



**GARDINER CITY COUNCIL  
AGENDA ITEM INFORMATION SHEET**



<b>Meeting Date</b>	02/07/2024	<b>Department</b>	City Manager
<b>Agenda Item</b>	4e. Advise and Consent to the awarding of the bid for the RFP for Reevaluation.		
<b>Est. Cost</b>	N/A		

<b>Background Information</b>	Please see the attached bids and memo from City Assessor Curt Lebel.		

<b>Requested Action</b>	"I move to award the bid for the tax reevaluation to _____ and direct the City Manager to enter into a contract."
<b>City Manager and/or Finance Review</b>	
<b>Council Vote/ Action Taken</b>	
<b>Departmental Follow-Up</b>	

<b>City Clerk Use Only</b>	1 <sup>st</sup> Reading _____	Advertised _____	<b>EFFECTIVE DATE</b> _____
	2 <sup>nd</sup> Reading _____	Advertised _____ w/in 15 Days	
	Final to Dept _____	Updated Book _____	Online _____

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INTEROFFICE MEMORANDUM

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**TO:** MAYOR HART AND CITY COUNCIL MEMBERS  
**FROM:** CURT LEBEL, ASSESSOR  
**SUBJECT:** AWARDING OF 2027 REVALUATION PROJECT  
**DATE:** 1/24/2024  
**CC:** ANDREW CARLTON, CITY MANAGER

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Dear Mayor Hart and Council Members,

The city has received two proposals in response to its RFP for a 2027 city-wide revaluation. KRT Appraisal of Haverhill, MA and Vision Government Solutions of Hudson, MA submitted proposals for the project. A review committee comprising of City Staff have reviewed the proposals and we are pleased to recommend that KRT Appraisal be awarded the contract for both the real and personal property 2027 revaluation project.

Project price proposals:

	KRT Appraisal	Vision Government Solutions
Real Estate	\$204,000	\$256,000
Personal Estate	\$21,000	No Proposal Submitted

KRT's proposal for real property was \$52,000 less than the competing bid received from Vision Government Solutions (VGSI). KRT also submitted the lone proposal for valuation of personal property. Both companies carry the capacity to perform the real property portion of the project within the guidelines of the RFP and within the time frame specified (VGSI proposed a 2026 revaluation). Both Companies are very familiar with the CAMA platform utilized by the city. VGSI owns the software platform, while KRT Appraisal is comprised of former VGSI staff who started their own company in 2010 and have completed over 60 projects since that time. KRT's was found to have greater overall and direct experience in Gardiner and other similar Maine municipalities. The three principal project managers and appraisers scheduled for the project were also directly involved in Gardiner's last revaluation project and already have a high level of familiarity with the city, despite the time that has elapsed. KRT has

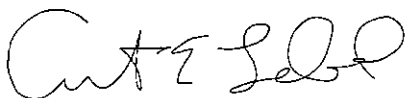
demonstrated a level of excellence in the development and implementation of mass appraisal models and public relations. All three of KRT's principal appraisers scheduled to work on this project are certified Maine assessors, which also differentiated KRT from the competition in terms of Maine specific qualifications. KRT's Personal property appraiser has also worked in Gardiner as part of the 2008 personal property revaluation with RRC. It was also the committee's conclusion that KRT demonstrated greater staff qualifications and longevity and consistency in its data collection team, which is the primary interface the company has with the taxpayer prior to valuations being released.

At KRT's quoted price of \$225,000 for a complete real and personal property project, strong firsthand knowledge of the City and staff experience, we found KRT to be the clear choice for recommendation to the Council.

A copy of both the KRT and VGSI proposals are attached to this memo.

We recommend the City Council award the 2027 revaluation project to KRT and authorize the City Manager to implement the contracting phase of the project.

Sincerely,

A handwritten signature in cursive script, appearing to read "Curt Lebel".

Curt Lebel, City Assessor



GOVERNMENT SOLUTIONS

RESPONSE TO THE REQUEST FOR PROPOSALS FOR:

Gardiner, Maine

Proposal – Property Revaluation Project

Due: December 12<sup>th</sup>, 2023 at 4:00pm

*Prepared by:*

*Patrick Donovan of Vision Government Solutions, Inc.*

*1 Cabot Rd, Hudson, MA 01749*

*Phone: 800.628.1013 ext. 3644 | Fax: 508.351.3798*

*Email: [pdonovan@vgsi.com](mailto:pdonovan@vgsi.com) | [www.vgsi.com](http://www.vgsi.com)*



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December 12<sup>th</sup>, 2023

City Assessor  
City of Gardiner  
6 Church Street  
Gardiner, ME 04345

Dear City Assessor:

Vision Government Solutions is pleased to propose Revaluation services for the Property Revaluation Project for the City of Gardiner in response to your RFP. We have been in the Revaluation and Municipal software business for over 40 years and have both the personnel and financial resources to complete your project. Our proposal is fully compliant with Maine certification and IAAO Standards requirements.

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

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

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

2. **Staffing and Reliability:** Unlike smaller firms with only a few staff members, Vision's New England appraisal team maintains a staff of over 60 full-time all the time. The best proof of our staff quality is in our retention rates, with 50% of our team having more than 20 years of experience at Vision. Specifically, we are proposing Steve Whalen as your Project Manager. Steve has extensive revaluation experience and will provide a detail-oriented project.
3. **The Value of Integration with the Raymond CAMA Software:** We plan to support the City of Gardiner's existing *Appraisal Vision*® CAMA software throughout the project. Vision's Appraisal Teams exclusively use our *Appraisal Vision*® CAMA software to conduct every revaluation. **There is no other vendor that has the level of experience on *Appraisal Vision*® Version 8 than the Vision appraisal team.** This is critical to the



GOVERNMENT SOLUTIONS

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

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

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

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

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

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

This proposal is good for 90 days.

Sincerely,

A handwritten signature in black ink, appearing to read "Sara Santos", with a long horizontal flourish extending to the right.

Sara Santos  
Chief Financial Officer

**BID PROPOSAL DOCUMENT**

This document is to be included in the bid package, clearly marked “**PROPOSAL – PROPERTY REVALUATION PROJECT**”.

Service	Total Price
1. Revaluation of all real property	\$ <u>256,000</u>
2. Revaluation of all personal property	\$ <u>No Bid</u>
3. Digital imaging services (If not included in #1 above)	\$ <u>Included in Item 1</u>
4. Web services during the revaluation public disclosure period (if not included in #1 above)	\$ <u>Included in Item 1</u>
5. Defense of values post commitment	\$ <u>Please see clarification page.</u>
6. Any other services available	\$ <u>N/A</u>

The above prices are to be considered separate, unbundled amounts. The City of Gardiner reserves the right to select or reject any or all prices, which ever arrangement it believes best serves its interests. The revaluation of real and personal property is to include data, loaded and operational in the City’s licensed Vision CAMA software.



**BID PROPOSAL FORM  
CITY OF GARDINER, MAINE**

**EXCEPTIONS & CLARIFICATIONS**

1. **Project Schedule:** We are proposal an April 1, 2026 effective date revaluation project, we have provided a detailed project schedule within our proposal.
2. **Pre-Data Collection Mailer:** We have included a notification mailer to be sent out to taxpayers prior to data collection to provide information on the revaluation project.
3. **On-Site Data Collection:** Vision will make an initial exterior inspection of all improved properties, utilizing existing city data, and attempt an interior inspection to obtain the interior property characteristics. If after the initial visit an interior inspection was not performed, Vision will provide a callback. Vision will send a callback notification letter to each property which has not had an interior inspection after the two attempts to arrange for an interior inspection.

Callbacks and Callback letters can be removed and replaced with sending Data Mailers and reviewing the returns from taxpayers, there is no price change for the change in scope of services.

No response to either letter would be considered a refusal.

4. **Imaging Services:** We have included a new image for each improved property in our proposal. Additional imaging services can be provided at a cost of \$2.75 per image. This cost includes the image capturing and the associated data entry into the CAMA system.
5. **Field Work Quality Checks:** We plan to utilize our Cloud services during the revaluation, from the commencement of data entry through to the completion of informal hearings. This will allow the assessor to quality control and monitor the progress of the project. Data Collection production, along with progress of other phases of the project, will be provided as part of monthly status reports that will be provided to the assessor. We have only included providing PDF field cards at the completion of the project.
6. **Field Review:** Vision will conduct a field review of all properties from the public ways utilizing appraisal staff level employees, at which time we will check the existing property characteristics after the data collection and apply the appropriate valuation methodology on each property.
7. **Web Hosting:** We have included our Web Hosting software as part of Public Relation program throughout the project.
8. **Software/Hardware:** We have not included any software, hardware, or equipment within our proposal.

9. **Exclusions:** Vision is only bidding on the Real Estate scope of services; we have not included any Personal Property/Utility scope of services in our proposal. The hydro dam is also excluded from our proposed scope of services.
10. **Valuation Notices/Informal Hearings:** We have included a valuation notice for every taxpayer as part of our proposal. This notice will be sent once preliminary values have been established. We will then provide Informal hearings, giving taxpayers an opportunity to discuss their new values. A second valuation notice will be sent to individuals that attend an informal hearing and/or have a valuation change.
11. **Liquidated Damages/Penalty:** Because the time from an initial bid to signing of a contract can vary widely, it is Vision's policy to assess the risk of a final date liquidated damages/penalty provision in the context of contract award when it is better known how long Vision will have to complete the project. Therefore, Vision reserves the right to negotiate any penalty provisions at the time of contracting. Once finalized, Vision will execute a contract/agreement. Vision would not have issue with liquidated damages/penalties associated with the project completion date but would take exception to any interim liquidated damages/penalties.
12. **Board of Assessment Review:** We have included three (3) days of Board of Review assistance. The City will review all Board of Assessment Review requests as a result of the project and will require a Vision Senior Appraiser to support only those requests requiring a value decision. The process will be a combined effort of both the City and Vision in an endeavor to handle all appeal requests effectively and expeditiously. Both staff will work together to resolve any outstanding valuation issues. Any additional assistance can be provided at a rate of One Thousand Dollars (\$1,000) per diem.
13. **Litigation:** We have included three (3) days of Litigation assistance. Any additional Litigation days, litigation preparation or Narrative Appraisal reports will be billed at the rate of One Thousand Two Hundred Dollars (\$1,200) per diem.

## **PROJECT SCOPE**

The scope of the project (Revaluation Project or Project) requires the complete appraisal and revaluation of all taxable real property, all tax-exempt real property, all taxable personal property and all tax exempted personal property located within the corporate limits of the City of Gardiner, Maine as of the effective date of the project.

The Company shall furnish all labor, materials, supplies, and equipment, and shall perform all work for the Project in strict accordance with the specifications outlined in this RFP.

The values to be determined shall be "just value" as defined in Maine Statutes and Maine Supreme Court decisions. The basis of valuation shall be the recognized methods of appraising real and personal property. It is anticipated that property will be valued at 100% of full market value, however a final determination of the ratio assigned will be determined by the City Assessor, dependent upon market conditions at the time of the effective date of the project.

## **SUBMISSION REQUIREMENTS**

All proposals shall include:

1. **Cover Letter:** A brief introductory letter.
2. **Company Personnel:** Provide relevant information regarding your project team including:
  - a) **Overview of the Firm:** Number of years engaged as a Company, corporation, partnership, or individual specializing in governmental tax revaluation services.
  - b) **Experience:** List of all municipal revaluations completed during the past five (5) years, including client contact, and telephone number, A list of Equalization Contracts for which the Company is currently committed.
  - c) **Project Team Member(s):** Name(s) of project team members, including the supervisor to be assigned to this project, along with project team member resumes/qualifications.
  - d) **Contact Details:** Name and telephone number of person(s) to be contacted for further information and clarification.
3. **Understanding:** Provide a (brief) summary of your understanding of the project.

4. **Approach:** Describe your recommended approach to complete the tasks outlined in the scope of services (above) including:
- a) Specifics of Company’s revaluation plan for the City.
  - b) Description of the Company’s public relations program that would be used during the Project such as scheduling, staffing, and conducting informal hearings.
  - c) Description of total cost and quality controls including:
    - i. Total cost of Real Property Revaluation
    - ii. Total cost of Personal Property Revaluation
    - iii. Effective date of proposed Project, with rationale for proposed effective date
    - iv. Time schedule filled out according to the Revaluation Schedule
    - v. Staged fee payments filled out according to the Revaluation Schedule
    - vi. Detailed Cost of appeals to State Board and Court
5. **References:** Names, addresses (including e-mail), and telephone numbers of representatives of current or recent clients familiar with the services your firm and project team (three suggested).
6. **Additional Information:** Any other supplementary information that in the opinion of the Company may assist the City in evaluating the Proposal.

**PROPOSAL DEADLINE AND BID OPENING**

Sealed Proposal shall be clearly marked “**PROPOSAL–PROPERTY REVALUATION PROJECT**” and addressed to **City Assessor, City of Gardiner, 6 Church St, Gardiner, ME 04345** and shall be supplemented by an electronic copy sent to [clebel@gardinermaine.com](mailto:clebel@gardinermaine.com).

**Anticipated RFP Timeframe:**

Proposal Deadline	Tuesday, December 12, 2023 4 PM EST
Proposal/Bid Opening	Wednesday, December 13, 2023
Proposal Evaluations/Selection of Company	Wednesday, January 24, 2024
Execution of Contract by Company	Wednesday, March 27, 2024
Performance Bond/!Guarantee	Agreed upon terms to be incorporated into contract

Proposals received prior to the time of opening will remain sealed. All Proposals shall be delivered by **4:00 P.M. on December 12, 2023**. Proposals shall be opened publicly at 1:00 pm on Wednesday, December 13, 2023.



## FINAL SELECTION EVALUATION CRITERIA

The City Assessor and City project staff will evaluate each proposal based upon the documentation requested herein using criteria which include but are not necessarily limited to or in the order of the following:

### 1. Organization, qualifications, and experience: 35%

- i. Describe the Proposer's experience providing services like those requested for this project. Identify at least 5 projects on which your company has performed work comparable to that required in this RFP in the last 5 years. Include company name, contact name, address, and phone number, as well as a description of the project, dates of the project and results.
- ii. Identify the key staff who will be assigned to fulfill the contract requirements. Provide resumes describing their educational and/or work experiences.

### 2. Project/Proposal Approach: 30%

- i. Describe how the proposed revaluation plan addresses the project scope.
- ii. Describe how the public relations plan addressed the project scope.
- iii. Describe how the proposal addresses any additional considerations outlined in the project scope.

### 3. Anticipated Schedule: 10%

- i. Stated Effective date of the project.
- ii. Anticipated Start date of property data collection (not more than 18 month prior to effective date of the project)
- iii. Provide a schedule of deliverables and any other relevant milestones.
- iv. Describe how the firm will manage its overall workload to meet deadlines for the deliverables and other relevant milestones listed above.

### 4. Fee Statement: 25%

- i. Proposed cost of services
- ii. Describe how the firm will control and monitor its costs

5. **Proposer's References:** Provide at least 3 work references with contact information and descriptions of resulting projects, with dates. The results of reference checks will be used in scoring proposals.

The City reserves the right to reject any, or any part of, or all Proposals; to waive informalities and technicalities and to accept that Proposal which the City deems to be in the best interest of the City whether it is the lowest dollar Proposal or not. **On or before January 31, 2024**, the City will notify the selected Company that it has been selected.

## **GENERAL CONTRACT CONDITIONS**

On or before **April 1, 2024**, the selected Company shall execute with the City a Contract based on the General Contract Conditions the following contract conditions, as outlined below, shall be included in greater detail in the contract between the Company and the City.

- Changes in the contract
- Subletting to specialists
- Performance surety bond
- Indemnification
- Insurance
- Severability, Waiver, Cancellation and Misrepresentation Clauses

**Periodic Payments:** The City will pay the Company amounts as billed less a retainage agreed upon through conclusion of the local appeal process.

### **Surety:**

1. The company shall provide a guarantee or other surety acceptable to the City of Gardiner to ensure the faithful fulfillment of all terms and conditions of the contract.
2. If Sub-Companies are used payment surety or guarantee must be submitted in a form as approved and accepted by the City of Gardiner.

### **Indemnification and Insurance:**

1. The Company agrees to defend and indemnify the City against claims for bodily injury, accidental death, and property damage, which may arise during the Company's performance of the contract, and, in all other respects, to hold the City harmless from both inadvertent and negligent acts of the Company, its employees, and agents.
2. The Company shall not be responsible for consequential or compensatory damages arising from the late performance or non-performance of the contract caused by special or unusual circumstances beyond its reasonable control, such as acts of God or force majeure.
3. The Company shall maintain public liability insurance, automobile liability insurance and workmen's compensation insurance, with appropriate endorsements to the City, as its interests may appear. The municipality and its officers, employees, and agents, other than those agents working for the Company must be named as additional insureds.
4. The public liability insurance shall be in the form of a standard commercial general liability policy with the inclusion of contractual liability coverage and shall provide coverage against claims for personal injury, death, or property damage with limits of at least:

- a) \$400,000, each person
  - b) \$400,000, each occurrence, for bodily injury liability, and
  - c) \$400,000, each occurrence, for property damage liability.
5. The automobile liability insurances shall be in the form of a standard comprehensive automobile liability policy.
  6. The Company shall not deny liability because of any legal defense to which the municipality is entitled by reason of being a municipality.
  7. The Company shall carry valuable papers insurance on any and all records applicable to the project against the loss or destruction of such records in an amount of not less than the contract price.
  8. Liability limits shall not be less than the limits established in the Maine Tort Claims Act, 14 M.R.S.A §8101-8166, as they may be amended from time to time.
  9. The Company shall provide to the City:
    - a) Certificates of insurance, written by an insurer or insurers licensed to do business in the State of Maine, confirming the required insurance coverage is in effect on the date of execution of the Project Contract, and
    - b) An agreement by insurer(s) that a 10-day written notice of impending cancellation or material change in insurance coverage by insurer(s) will be provided to the City before cancellation or change should occur.

**Liquidated Damages/Penalties:** Failure of the Company to meet contracted deadlines for completion of work and approval by the City Assessor as having met the standards of these Specifications and the Contract, shall be cause for payment of liquidated damages by the Company, on demand by the municipal officers, according to the following proposed schedule, to be agreed upon by both parties:

- Deadline for delivery of preliminary values = \$600 per day
- Deadline for delivery of final values and all revaluation records, items and systems are delivered to the City Assessor in accordance with the General Contract Conditions = \$1,200 per day.

These deadlines may be amended by mutual agreement by both parties if determined to be necessary due to extended informal hearings, the City Assessors review of values or other circumstances outside of the control of the Company.

The Company shall not be liable for delays caused by reason of war, terrorism, strike, explosion, Acts of God, Orders of Court, or other public authority.

**City Contact:** Unless otherwise indicated in this RFP, all correspondence to be sent to the City shall be sent to the following address:

Curt Lebel, City Assessor  
City of Gardiner  
6 Church Street  
Gardiner, Maine 04345

**Additional Requirements:** The City reserves the right to specify additional requirements for inclusion in the final agreement with the Company.

## **REVALUATION SCHEDULE**

The Company shall start the equalization project as soon as practicable after signing the Contract, or upon a date as agreed to by the City Assessor. Thereafter the Company must continue in a diligent manner to ensure completion within the schedule of completion dates as set forth below.

**Scheduled Completion Dates:** The Company shall submit a schedule for the phases of the Project which sets forth the dates for completion and that schedule shall be incorporated into the Contract. Key Completion deadlines specified\*, which may result in liquidation damages shall be binding upon the Company. The phases of the Project are as follows:

1. Assignment of the Project Manager who shall be the Company representative on the project.
2. Public information and media releases
3. Complete residential data collection: measuring, listing and photos.
4. Complete commercial, industrial, public utility, special purpose, and tax-exempt data
5. collection-measuring, listing and photos
6. Complete land study and value analysis and development of Land Pricing Schedules
7. Complete building cost manual and development of Cost Schedules
8. Complete market data study to begin appraisals.
9. Complete study of market rents, expenses and capitalization factors to begin appraisals.
10. Valuing of land
11. Valuing of buildings
12. \*Deliver completed residential appraisals on property record cards with all measurements, sketches, listings, pricing, review and values, incorporating all building permits up to and including the effective date of the project, to the City Assessor.
13. \*Deliver completed commercial, industrial, public utility, and special purpose appraisals on property record cards with all measurements, sketches, listings, pricing, review and values including assessment computation to the City Assessor.
14. Assessment notices mailed.
15. Informal hearings begin.
16. Informal hearings completed.
17. Determination notices mailed
18. \*Computer file is updated for all final appraisals
19. Assist the City Assessor with formal appeals as necessary.
20. Assist the City Assessor with appeals to Board of Assessment Review and or Superior/Supreme court as necessary.



## **RESPONSIBILITIES OF REVALUATION COMPANY**

The Company's Project Manager and City Assessor shall regularly discuss the progress and various other details of the Project. These discussions may be scheduled to occur more frequently if they are found to be necessary by the city.

Property data, and/or appraisals and records shall not be made public until after the assessment notices are mailed.

**Equipment and Supplies:** The Company shall provide all equipment and supplies at the Company's expense except as otherwise provided herein.

**Deliverable Products:** All documents, records, data, and other materials procured or produced in the performance of the Project will become the sole property of the City. The documents, records, data, and other materials will include:

1. Documentation of procedures used throughout the Project.
2. All manuals used in any phase of the Project.
3. Data collection and valuation manuals for use in maintaining and updating values.
4. Detailed valuation manuals, including tables and formulas used in applying the cost, sales comparison and income approaches to property valuation; grade and housing type descriptions for each grade and housing type.
5. Source information used in the development of cost, sales comparison and income approach schedules.
6. A field card for all properties
7. Digital photos of all buildings
8. All manual and computerized reports supporting valuation formulas and values for vacant land and improved properties.
9. All sales ratio studies utilized in the Project.
10. Field review documents reflecting preliminary values, adjusted preliminary values, and any notes relative to informal review actions.
11. A report on all informal hearings. Each meeting with property owners shall be documented stating the property owners' issue(s) and the Company representatives' response(s). A final report showing the number of hearings, the number and amounts of values changed.
12. Valuation List of new values
13. All documents shall be delivered as digital files, unless otherwise specified by the City Assessor
14. The Company shall provide training for appropriate City personnel, adequate to provide them with the knowledge necessary to understand and use the appraisal system and/or other software installed by the Company, if necessary.

**Public Relations:** The parties to this Project recognize that a good public relations program is required. The Company shall support the City Assessor in conducting a public information program. All public information releases shall be approved by the City Assessor prior to release. The Company shall submit a detailed public relations plan to the City with its proposal. The program must include but is not limited to:

*Prior to Data Collection:*

1. Press releases
2. Meetings with local officials
3. Public meetings on the following topics:
  - a) Laws concerning revaluation market value
  - b) General outline of revaluation project
  - c) Data Collection
  - d) Valuation procedures
  - e) Review procedures
  - f) Informal hearings
  - g) Taxpayer formal appeal proceeding
  - h) Pre-data collection leaflet/notice to property owners

*During Data Collection and Valuation:*

1. Press releases
2. Meetings with local officials
3. Meeting with civic groups
4. Public Meetings

*After Data Collection and Valuation:*

1. Press releases
2. Meetings with local officials
3. Public meetings
4. Informal Hearings
5. Board of Assessment Review meetings

**Conduct of Company Employees:** As a condition of this Contract, the Company's employees shall treat residents and City employees with respect and courtesy. The Company shall take appropriate and meaningful disciplinary measures against those who violate the terms of this provision and shall immediately remove any employee from the project if requested to do so by the City Assessor.

**Inspections:** All physical improvements shall be inspected, measured, and listed, noting all interior and exterior construction details, quality of construction, age, and condition.

**Sketches:** Sketches of all significant buildings shall be drawn to scale with dimensions given on the property record card.

**Data Entry:** All data entry will be entered into the City's CAMA system by the Company.

**Field Work Quality Check:** At the end of each month the Company shall provide the City Assessor report of properties inspected until the completion of the public hearings. The City Assessor may conduct checks to ensure the quality of data collection. The Company shall notify the City Assessor monthly of the region of City field collection will take place in the following month so that the information can be posted on the City's website.

**Sales Analysis:** The Company shall analyze qualified sales for the two (2) year period immediately preceding the effective date of the project. These sales shall be reduced to appropriate units of comparison and segregated into the following major categories: vacant residential land, vacant commercial land, vacant industrial land, mobile homes, residential condominiums, commercial condominiums, residential properties, commercial properties, apartment properties and industrial properties. Further subcategory breakdown such as ranch, split level, cape, retail, office, gas station, etc. will also be required. No values shall be set until such an analysis is presented to, reviewed, and accepted by the City Assessor.

**Assessment Notices:** A notice shall be sent, at the Company's expense, by first class mail, to each owner of record as of the effective date of the project, setting forth the new valuation that has been placed upon the property identified in the notice. If possible, at the time of the notice, an estimated tax rate will be included. The notice shall be prepared in duplicate and conformity with the Maine Law and approved by the City Assessor prior to mailing. The duplicate copies will be delivered to the City Assessor in electronic form (i.e. pdf) and arranged in map/lot sequence.

Further, the notices shall include information specifying the dates, times, and place of the informal hearings. Such notices and information shall be subject to approval by the City.

Prior to sending notices, the Company shall memorialize the proposed new values in the CAMA's Assessment History section as Interim values. The Company and City shall cooperatively update the City's Website to allow public access to the property interim property record cards.

**Informal Hearings:** The Company shall hold informal hearings, at such times and locations as the City may specify, so that owners of property, or legal representatives of owners, may discuss with qualified members of the Company's staff the assessed valuations of their property. The Company's personnel shall explain the manner and methods of arriving at value. Informal hearings, at the discretion of the City, may be held on weeknights and Saturdays as well as during business hours. Members of the City's Assessing Department staff may also be present at hearings.

The Company, in conjunction with recommendations of the City, shall schedule a sufficient number of hearings and provide sufficient qualified personnel certified by the State of Maine and approved by the City to handle said hearings expeditiously and fairly. **It is expected that a minimum of 3 weeks will be allocated to hearings, with the capacity to extend this timeframe, if deemed necessary by the City Assessor.**

Any information offered by the taxpayer shall be given consideration, and adjustments shall be made where warranted. The Company shall notify in writing each taxpayer who has appeared at an informal hearing of the results of that hearing whether the assessment has been changed or not. The content and form of such notices shall be subject to the prior approval of the City Assessor.

**Defense of Values:** For requests for abatements or appeals of assessments, the Company will follow the following procedures.

The Company agrees that the Project Manager or Field Appraiser of the Gardiner project shall be present or available at the request of the City Assessor for the period of time necessary to assist in considering abatement requests and to assist the City Assessor in explaining the basis of the revaluation to property owners.

The Company agrees that the Project Manager in charge of the Gardiner project should be present if requested at any hearing of local and/or state body of assessment appeals following completion of the project and to defend the values.

In the event of any appeal to the courts, the Project Manager in charge of the Gardiner project will be present at the hearing to testify as a witness, to outline the steps taken and give his opinion of value of the property which has been or is the subject of appeal.

The Company agrees to assume all costs for services rendered by it in connection with any and all hearings, reviews and/or court actions provided the filing of such hearing, review and/or court action is commenced within one (18) months of the revaluation effective date.

## **APPENDIX A - APPRAISAL SPECIFICATIONS**

**Appraisal of Land:** The Company shall appraise all types of land within the City.

**Land Inspection:** The Company shall be responsible for identifying and considering in its valuation of each land parcel the physical, legal, and economic factors which may affect its use and value.

**Land Value Study:** Vacant land sales occurring during the two-year period immediately preceding the effective date of the project shall be analyzed.

Improved property sales data shall be analyzed, at a minimum, for arms-length transactions occurring during the two (2) year period immediately preceding the effective date of the project, in order to estimate land values by the residual method.

The Company shall consider factors affecting land value, such as location, zoning, available utilities, size, shape, topography, view, improvements, special exceptions or zoning variances, nonconforming uses, flood plains, flood zones, and special purpose uses.

**Land Unit Value:** The City Assessor, in consultation with the Company, shall determine what type of land unit values and formulas shall be used for the various types of property and property locations. The front foot, square foot, acreage, fractional acreage and per lot units shall be considered, among other possibilities.

**Neighborhood Delineation:** The Company shall delineate neighborhood units within the City.

**Land Value Inspections:** The Company shall make a physical inspection of each plot of land from the public way and make necessary adjustments in value to compensate for topographical irregularities

such as high banks, steep slopes, swamps, irregular shape or any other factor which may detract from or enhance the value of the land.

## **RESIDENTIAL BUILDINGS AND STRUCTURES**

**Data Collection:** The Company shall view by physical inspection the exterior and interior of all real property in the City in compliance with Maine law.

The Company shall make a listing of physical construction details of all the structural improvements pertinent to residential property in the City on field cards for entry into the CAMA database. Details of all structural improvements are also to be listed on the field cards. Digital photos of each significant structure are to be taken at the first visit and entered into the CAMA database.

**Measurer/Lister Identified:** The field card and the property record card shall indicate the Lister and date(s) of the listing.

**Entrance Refused:** When entrance to a building for an inspection is refused, the Lister shall make note of the fact and within two (2) working days notify the City Assessor.

The Company shall not enter premises when only minor children are present. The Company shall make one (1) call back.

**Call Backs:** Where necessary it is expected that the Company shall make one (1) call back. The Lister making the call back shall note the time and date of call back on the field card and on the property record card.

**Notification Letter:** If after one (1) call back, contact was not established with a property owner, a notification letter (approved by the City) shall be mailed at the Company's expense, notifying the property owner that the representatives of the Company were not able to make contact, and request that within a prescribed time limit the property owner contact the Company to arrange an inspection.

**Preliminary City Acceptance:** Prior to the mailing of the assessment notices, the Company's Project Manager will review the valuations with the City Assessor, who shall approve the release of notices.

## **COMMERICAL, INDUSTRIAL, UTILITIES, EXEMPT & SPECIAL PURPOSE PROPERTIES**

All commercial, industrial, public utility, exempt, and special purpose buildings and improvements shall be inspected, classified, priced, and valued.

**Description:** All buildings shall be identified and described as component parts of construction, size, area, age, and usage.

**Income Approach:** Income and expense data shall be gathered by the Company on forms approved by the City Assessor, which shall become the property of the City. Proprietary information of property owners shall not become a public record.

The Company shall develop, with the involvement of the City Assessor, capitalization rates and gross rent multipliers through interviews with bankers, investors, realtors, appraisers, and other informed sources.

The Company shall determine market and economic rents, vacancy rates, operating expenses, capitalization rates, and/or gross rent multipliers applicable to the various classes of commercial, industrial, and special-purpose properties being valued. The Company shall document, in writing, its sources of information, and describe its use and analysis in estimating values.

The Company shall perform the income capitalization approach using generally accepted methods and techniques. Gross rent multipliers shall be used as an additional valuation check where applicable.

The Company shall mail income and expense questionnaires to all commercial and industrial property owners. Responses shall become the property of the City at the completion of the Project. Proprietary information shall not become a public record.

**Fixed Equipment:** All fixed machinery and equipment serving a building and taxable as real estate shall be listed within that building and valued in accordance with procedures as outlined in the applicable price schedule. If a question exists whether certain machinery or equipment is taxable as real estate, the Company shall bring that question to the attention of the City Assessor

The City Assessor shall be notified in writing of any item which might be considered personal property and is included in the valuation of the building. It shall be separately listed and described by the Company either on the property record card or separately on another record.

**Review:** The reviewer shall be competently trained, certified and fully experienced in the appraisal of the particular type and kind of commercial, industrial, public utility or special purpose building for which the reviewer is responsible.

## **PERSONAL PROPERTY**

The appraisal company shall provide a brief description of all personal property appraised. The company shall appraise and total separately each class or kind of personal property. The company shall conduct an examination of the property involved, sufficiently detailed to ascertain the reasonableness of the information provided. Where records or statements are of little assistance the company shall list and value major items of property individually. Minor or group items may be combined, listed, and valued in a total value for the group or kind. A major item is here considered as a unit, machine, or item of equipment for which the current value is \$2,000 or more.

The company shall load all valuation data into the City's Vision CAMA system.

The Company shall value and record in the city's CAMA system all BETE exempt equipment and exempt amounts and submit the qualifying applications to the City Assessor for approval.

All personal property shall be valued in accordance with accepted standards established by Maine Statute and the Bureau of Taxation. Where a question arises as to value and/or method(s) of valuation the City Assessor shall make the final determination.

**Preliminary City Acceptance:** Prior to the mailing of the assessment notices, the Company's Project Manager will review the final values, computed by the Company, with the City Assessor to ensure that the City is prepared to accept the Company's work. The City Assessor will make the final judgment on the final value.

## **APPENDIX B - RESPONSIBILITY OF CITY**

**Maps:** The City shall furnish one set of Tax Maps showing streets, property lines, and parcel identification numbers, along with PDF versions.

**Zoning:** The City will furnish one (1) set of the current City zoning regulations and a zoning map.

**CAMA Database & CAMA Software:** The City Assessor will make available to the Company the current CAMA database.

**Property Transfers:** The City shall notify the Company, on a regular basis, of property splits and transfers occurring after the initial establishment of the Company's database for this information. The Company shall update its records in accordance with this notification.

**Building Permits:** The City shall furnish the Company copies of all building permits issued during the course of the Project up to the effective date of the project.

**Introduction:** The City Assessor shall furnish letters of introduction and authority to inspect real estate in the City along with suitable identification badges.

**Mailing Address:** The City shall furnish through the Assessors Office the current mailing address of all property owners.

**Mail:** For any mail the Company is required to send in conjunction with this Project, it is the responsibility of the City to investigate all returned mail for updated name or address and to re-mail such mail.

**Office Space:** The City shall furnish the Company with sufficient office space, necessary office furniture and copier equipment to carry out the terms of this project.

**Assessing Personnel:** The City Assessor may, from time to time, accompany listers/appraisers on property visits.



## APPENDIX C – DEFINITIONS

**City Assessor:** shall mean the duly appointed Assessor of the City of Gardiner, Maine  
**CAMA:** shall mean Computer Assisted Mass Appraisal

**CMA:** shall mean Certified Maine Assessor

**Company or Company:** shall mean any person, firm, corporation, association, or other entity performing the revaluation work under contract.

**Contract:** shall mean the agreement between the Company and the City to provide services in accordance with this RFP

**Effective Date of the Project:** shall mean the statutory date of Assessment. April 1, 2025, or April 1, 2026 (whichever is specified in the Contract)

**Field Card:** shall mean the document used in the field to record information about the property when the property is listed and measured

**Project or Equalization Project:** shall mean the reappraisal and revaluation of all taxable real property and all tax-exempt real property within the corporate limits of the City of Gardiner

**Property Record Card:** shall mean the card generated from the CAMA system

**Proposal:** shall mean the Company or Company's proposal submitted in accordance with the RFP requirements

**RFP:** shall mean Requests for Proposals Specifications: shall mean the requirements of the RFP

**City:** shall mean the City of Gardiner, Maine



## *APPROACHES TO VALUE*

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

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

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

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

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

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

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



**Approaches to Value, *continued***

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

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

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

## SALES AND COST ANALYSIS

- a. The contractor will make an analysis of land sales and developed parcel sales that have occurred in at least the current and two previous years ending April 1, 2026. Sales utilized in this analysis will be summarized and bound in a loose-leaf book to be utilized as a valuation guide and a source of comparable sales for the valuation of property in the town. The binder shall include the property record card and valuation print out for the sold properties. Sales data will also be depicted on a set of tax maps for the town.
- b. Unit cost schedules will be developed based upon local construction costs. The schedules shall be suitable for the valuation of properties of the sizes and types found in the town.
- c. A building grading system and specifications of construction for various grades to be utilized in the valuation of property in this project will be developed.
- d. The land schedules developed may utilize front foot, square foot, or acreage units as appropriate for the valuation of areas and property types located in the town.
- e. An appraisal manual, including grading specifications, cost schedules, depreciation schedules, and land valuation schedules shall be developed for the project. It shall be entitled "Assessment Manual". Two copies of the appraisal manual will be delivered to the assessors' office upon completion of the project.
- f. The appraisal manual will be confirmed with a sales ratio analysis and coefficient analysis computed in a manner suggested by Maine Revenue Services. The goal is to obtain a residential sales ratio of between 95 and 100% with a coefficient of dispersion of 15 or less.

**PROPOSED SCHEDULE  
CITY OF GARDINER, MAINE  
2026 REVALUATION PROJECT**

<b><i>TASK</i></b>	<b><i>FROM</i></b>	<b><i>TO</i></b>
Project Startup	12/01/2024	01/01/2025
Public Relations	12/15/2024	07/01/2026
Data Collection, New Images & Data Entry	02/01/2025	02/01/2026
Land Study and Building Cost Manual	10/01/2025	03/01/2026
Market Data Study	11/01/2025	04/15/2026
Field Review	03/01/2026	05/28/2026
Commercial Study of Market Rents, Expenses & Capitalization Factors	03/21/2026	05/30/2026
Deliver Residential & Commercial Proposed Values to Assessor	06/01/2026	
Assessor review of values	06/01/2026	06/14/2026
Assessment hearing notices mailed	06/17/2026	
Informal Hearings and Hearing Changed notices mailed out	06/21/2026	07/21/2026
Finalization	07/21/2026	07/29/2026
<b>Project Completion</b>	<b>07/30/2026</b>	

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





## ***VISION GOVERNMENT SOLUTIONS INC. CORPORATE PROFILE***

### ***COMPANY***

Since 1975, Vision Government Solutions, Inc. has been providing quality Appraisal Services and CAMA Software to assessing departments located throughout the United States. During this time, our company has grown to be the largest New England based provider of revaluation services and software and we now enjoy a reputation that is unmatched in our industry. Our appraisal staff is comprised of professionals that have significant industry experience. Our Senior Appraisal personnel average over 20 years of experience, yet all remain committed to continuing their appraisal education and adopting new and innovative appraisal techniques. We complement our strong employee experience by providing technologically advanced CAMA software and we support this software with a well-staffed and fully trained group of programmers, help desk specialists and appraisal experts. Our software is currently installed in over 425 assessing jurisdictions located throughout the United States and the District of Columbia with installations that range from 500 parcels to more than 1,000,000.

### ***INNOVATION***

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

### ***COMMITMENT***

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



## ***SERVICES***

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



## Advantages and Benefits of Vision Government Solutions

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

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

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

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

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

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

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

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

***REVALUATION  
REFERENCES***

<i>Municipality</i>	<i>Contact</i>	<i>Phone</i>	<i>Email</i>
Bar Harbor, ME	Steven Weed	207-288-3320	<a href="mailto:sweed@barharbormaine.gov">sweed@barharbormaine.gov</a>
Falmouth, ME	Robert Sutherland	207-781-5253 x5323	<a href="mailto:assessor@cumberlandcounty.org">assessor@cumberlandcounty.org</a>
Gorham, ME	Mike Darcangelo	207-222-1600 x1601	<a href="mailto:mdarcangelo@gorham.me.us">mdarcangelo@gorham.me.us</a>
Wells, ME	Keeley Lambert	207-646-6081	<a href="mailto:klambert@wellstown.org">klambert@wellstown.org</a>

## VISION CURRENT COMMITTED LIST

<u>TOWN</u>	<u>PROJECT TYPE</u>	<u>FISCAL YEAR</u>
Bethlehem, CT	Update	2023
Bolton, CT	Update	2023
Brooklyn, CT	Partial Reval	2024
Burlington, CT	Update	2023
Canterbury, CT	Partial Reval	2024
Canton, CT	Hybrid Reval	2023
Chaplin, CT	Partial Reval	2023
East Granby, CT	Update	2023
Essex, CT	Reval	2023
Hampton, CT	Partial Reval	2023
Harwinton, CT	Update	2023
Kent, CT	Update	2023
Lebanon, CT	Partial Reval	2023
Litchfield, CT	Update	2023
Lyme, CT	Update	2023
Madison, CT	Reval	2023
New Hartford, CT	Update	2023
New London, CT	Partial Reval	2023
Norwich, CT	Update	2023
Norwalk, CT	Reval (No C&I)	2023
Old Saybrook, CT	Update	2023
Pomfret, CT	Partial Reval	2024
Sharon, CT	Update	2023
Union, CT	Partial Reval	2023
Wilton, CT	Data Mailer Reval	2023
Windham, CT	Partial Reval (Residential)	2023
Windsor, CT	Partial Update	2023
Boxford, MA	Update	2024
Clinton, MA	Update	2024
Dartmouth, MA	Data Collection	2023-2024
Dudley, MA	Data Collection	2023-2027
Framingham, MA	Update	2024
Ipswich, MA	Interims + Update	2025-2027
Lexington, MA	Data Collection/Valuation	2024
Mansfield, MA	Data Collection	2023-2025
Marion, MA	Update	2024
Marlborough, MA	Update	2024
Mattapoissett, MA	Update	2024
North Attleboro, MA	Data Collection	2022-2023

Norwell, MA	Update	2024
Norwood, MA	Update	2024
Princeton, MA	Update	2024
Sharon, MA	Data Collection	2022-2024
Westminster, MA	Data Collection	2022-2023
Westminster, MA	Update	2024
Worcester, MA	Update	2023
Casco, ME	Reval	2024
Wells, ME	Partial Reval	2023
Yarmouth, ME	Reval	2024
Bedford, NH	Update	2023
Claremont, NH	Data Collection	2023
Claremont, NH	Update	2023
Hooksett, NH	Update	2023
Clarion County, PA	Reval	2024
Huntingdon County, PA	Data Collection	2022
Perry County, PA	Reval	2025
Schuylkill County, PA	Reval	2025
Tioga County, PA	Reval	2023
Warren County, PA	Reval	2025
Cranston, RI	Reval	2023
Cumberland, RI	Reval	2022
Exeter, RI	Update	2023
Middletown, RI	Update	2023
New Shoreham, RI	Update	2023
Pawtucket, RI	Update	2023
Warwick, RI	Update	2022
Bridgewater, VT	Data Quality	2023

Revised 7/10/2023

## COMPLETED REVALUATION/UPDATES

### MASSACHUSETTS

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

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

Westminster  
Weston  
Westwood  
Wilbraham  
Wilmington  
Woburn  
Worcester  
Yarmouth

### MAINE

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

**VERMONT**

Bridgewater  
Castleton  
Colchester  
Hartford  
Newport  
Pittsford  
West Rutland  
Williston

**NEW HAMPSHIRE**

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

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

**CONNECTICUT**

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

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



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

New Shoreham  
North Kingstown  
North Smithfield  
North Providence  
Pawtucket  
Portsmouth  
Providence  
Richmond  
Smithfield  
South Kingstown  
Tiverton  
Warwick  
Westerly  
Woonsocket

**RHODE ISLAND**

Barrington  
Burrillville  
Central Falls  
Charlestown  
Cranston  
East Providence  
Exeter  
Foster  
Jamestown  
Johnston  
Lincoln  
Little Compton  
Middletown  
Narragansett  
Newport

## INSTALLED CAMA CLIENT LIST

Andover	CT	John	Chaponis	860-742-7305 ext.5
Ansonia	CT	Dayna	Casubolo	203-736-5950
Barkhamsted	CT	Carmen	Smith	860-379-3600
Berlin	CT	Joe	Ferraro	860-828-7067
Bethlehem	CT	Elizabeth	Paul	203-266-7510 ext. 204
Bloomfield	CT	Todd	Helems	860-769-3532
Bolton	CT	Helen	Totz	860-649-8066 ext. 6100
Branford	CT	Barbara	Neal	203-488-2039
Bridgeport	CT	Ron	Keilty	203-394-6968
Bridgewater	CT	Denise	Pinter	860-355-9379
Bristol	CT	Tom	DeNoto	860-584-6245
Brookfield	CT	Tammie	Fiske	203-775-7302
Brooklyn	CT	Maryann	Szela	860-774-5611 x21
Burlington	CT	Beth	Paul	860-673-3901 ext. 3
Canaan	CT	Hazel	McGuire	860-824-0707 ext. 14
Canterbury	CT	Lynn	Byberg	860-546-6035
Chaplin	CT	Chandler	Rose	860- 455-0073 ext. 314
Clinton	CT	Donna	Sempey	860-664-1119 or 860-669-9269
Colchester	CT	John	Chaponis	860-742-7305 x5
Colebrook	CT	Cory	Iacino	860-379-3738 ext 206
Cornwall	CT	Barbara	Bigos	860-672-2703
Coventry	CT	Mike	D'Amicol	860-742-4067 x123
Danbury	CT	Robert	Zarbock	203-797-4556
Deep River	CT	Robin	O'Loughlin	860-526-6029 ext. 232
East Granby	CT	Mary Ellen	Brown	860-653-2852
East Haddam	CT	Loreta	Zdanys, CCMAII	860-873-5026
East Hampton	CT	Debbie	Copp	860-267-2510 x3325
East Hartford	CT	Brian	Smith	860-291-7268
East Lyme (Niantic)	CT	Diane	Vitagliano	860-739-6931 ext. 1107
Enfield	CT	Della	Froment	860-253-6339
Essex	CT	Jessica	Sypher	860-767-4340 ext. 123
Fairfield	CT	Ross	Murray	203-256-3110
Glastonbury	CT	Nicole	Linteur	860-652-7604
Goshen	CT	Lucy	Hussman	860-491-2115 ext. 230
Granby	CT	Sue	Altieri	860-844-5312
Griswold	CT	Rosalyn	Dupuis	860-376-7060 x2106
Haddam	CT	Tammy	Anderson	860-345-8531 ext. 226
Hamden	CT	Tom	Molloy	203-287-7120
Hampton	CT	Kathy	Thornton	860-455-9132 ext. 5
Harwinton	CT	Michele	DeSilva	860-485-0898
Kent	CT	Patricia	Braislin	860-927-3160

Lebanon	CT	Emma	Sousa	860-642-6141
Ledyard	CT	Adrianna	Hedwall	860-464-3237
Lisbon	CT	Angel	Johnstone	860-376-5115
Litchfield	CT	Kathy	Brown	860-567-7559
Lyme	CT	Deborah	Yeomans	860-434-8092
Madison	CT	Orietta	Nucolo	203-245-5651
Manchester	CT	John	Rainaldi	860-647-3011
Mansfield	CT	Rochelle	Lambert	860-429-3311
Marlborough	CT	Marie	Hall	860-295-6201 ext. 213
Middlebury	CT	Chris	Kelsey	203-758-1447
Middlefield	CT	Christine	Barta	860-349-7111 ext. 16
Middletown	CT	Damon	Braasch	860-638-4930 ext. 0
Milford	CT	Marcus	Irrek	203-701-4420
Monroe	CT	Justin	Feldman	203-452-2800 ext. 1010
Morris	CT	Betsy	Quist	860-567-6096
Naugatuck	CT	Carol Ann	Tyler	203-720-7016
New Britain	CT	Michael	Konik	860-826-3326
New Fairfield	CT	Rich	Seman	203-312-5625
New Hartford	CT	Cory	Iacino	860-379-5235
New Haven	CT	Alex	Pullen	203-946-4800
New London	CT	Rochelle	Lambert	860-437-6317
New Milford	CT	Brian	Lastra	860-355-6070 x1 then x5
Newtown	CT	Joyce	Alegi	203-270-4241
Norfolk	CT	Cory	Iacino	860-542-5287
North Branford	CT	David	Ambrose	203-484-6013
Norwalk	CT	William	Ford	203-854-7941
Norwich	CT	Donna	Ralston	860-823-3722
Old Lyme	CT	Melinda	Kronfeld	860-434-1605 ext. 218
Old Saybrook	CT	Norm	Wood	860-395-3137
Orange	CT	Mark	Branchesi	203-891-4700 ext. 4722
Oxford	CT	Dan	Kenny	203-888-2543 ext. 3021
Plainfield	CT	Mary Ellen	Hall	860-230-3008
Pomfret	CT	Tina	Corriveau	860-974-1674
Preston	CT	Mildred	Peringer	860-889-2529 ext. 115
Putnam	CT	Angela	Sanchez	860-963-6802
Redding	CT	John	Ford	203-938-5001
Salem	CT	Michael	Kapinos	860-859-3873 ext. 130
Salisbury	CT	Kayla	Johnson	860-435-5176
Seymour	CT	Joseph	Kusiak	203-881-5013
Sharon	CT	Patricia	Braislin	860-364-0205
Somers	CT	Walter	Topliff	860-763-8203
South Windsor	CT	Mary	Huda	860-644-2511 ext. 213
Southbury	CT	Darcel	Peters	203-262-0674
Southington	CT	Jennifer	Lineaweaver, CCMA II	860-535-5098
Sprague	CT	Michael	Kapinos	860-822-3002
Stafford	CT	Tami	Rossi	860-684-1786

Stamford	CT	Greg	Stackpole	203-977-4018
Stonington	CT	Marsha	Standish	860-535-5005
Stratford	CT	Melinda	Fonda	203-385-4025
Thompson	CT	Paul	Hopkins	860-923-2259
Tolland	CT	Jason	Lawrence	860-871-3655
Trumbull	CT	Mark	Devestern	203-452-5015
Union	CT	Mary	Huda	860-684-5705
Wallingford	CT	Shelby	Jackson, III	203-294-2001
Waterford	CT	Paige	Walton	860-444-5822
West Hartford	CT	Joe	Dakers	860-561-7416
West Haven	CT	Ann Marie	Gradoia	203-937-3513 ext. 1
Westbrook	CT	Pam	Fogarty	860-399-3016 ext. 122
Westport	CT	Paul	Friia	203-341-1135
Willington	CT	Walter	Topliff	860-487-3122
Wilton	CT	Sarah	Scacco	203-563-0121
Winchester	CT	Rhonda	Roy	860-379-5461
Windham	CT	Chandler	Rose	860-465-3026
Windsor	CT	Lawrence	LaBarbera	860-285-1819
Wolcott	CT	Pamela	Deziel	203-879-8100 ext. 111
Woodbridge	CT	Betsy	Quist	203-389-3417
Woodstock	CT	Emily	Carlone	860-928-6929 ext. 326
Washington	DC	William	Nelson	202-442-6784
Pasco County	FL	Gary	Joiner	352-521-4433
Putnam County	FL	Tim	Parker	386-329-0300
Sumter County	FL	Shauna	Jordan	352-569-6791
Taylor County	FL	Bruce	Ratliff	850-838-3511
Abington	MA	Jolanta	Briffett	781-982-2107
Acton	MA	Brian	McMullen	978-264-9622
Agawam	MA	Carolyn	Reed	413-726-9704
Amesbury	MA	Jason	DiScipio	978-388-8102
Amherst	MA	David	Burgess	413-259-3024
Aquinnah	MA	Angela	Cywinski	508-645-2306
Ashburnham	MA	Board of	Assessors	978-827-4100
Athol	MA	Lisa	Aldrich	978-249-3880
Attleboro	MA	Julie	Hobson	508-223-2222 ext. 3135
Auburn	MA	Seth	Woolard	508-832-7740 ext 1234
Avon	MA	Paul	Sullivan	508-588-0414 ext. 1027
Barnstable	MA	Edward	O'Neil	508-862-4020
Barre	MA	Eileen	White	978-355-2504 ext 103
Berlin	MA	Molly	Reed	978-838-2256
Blackstone	MA	Patricia	Salamone	508-883-1500 ext. 121
Boxford	MA	Kristin	Hanlon	978-887-6000 ext. 142
Boylston	MA	Paul	O'Connor	508-869-6543
Cambridge	MA	Gayle	Willett	617-349-4343
Chelmsford	MA	Frank	Reen	978-244-3317
Chelsea	MA	Jim	Sullivan	617-466-4012

Chicopee	MA	Laura	McCarthy	413-594-1430
Clinton	MA	David	Baird	978-365-4117
Concord	MA	Lane	Partridge	978-318-3075
Dartmouth	MA	Richard	Gonsalves	508-910-1809
Dedham	MA	Richard	Henderson	781-751-9130
Dracut	MA	Karen	Golden	978-453-2451
Dudley	MA	Lisa	Berg	508-949-8006
Duxbury	MA	Steve	Dunn	781-934-1100 ext. 5430
East Brookfield	MA	Donna	Wentzell	508-867-6769 ext. 302
East Longmeadow	MA	Diane	Bishop MAA	413-525-5400 ext. 1601
Easthampton	MA	Lori	Stewart	413-529-1401
Easton	MA	Robbie	Alford	508-230-0520
Edgartown	MA	Jo Ann	Resendes	508-627-6141
Foxborough	MA	Hannelore	Simonds	508-543-1215
Gardner	MA	Celia	Jornet	978-632-1900 x8034
Georgetown	MA	Thomas	Berube	978-337-0492
Gloucester	MA	Nancy	Papows	978-281-9715
Gosnold	MA	Pat	Decosta	508-990-7408
Grafton	MA	Mary	Oliver	508-839-5335 ext. 1151
Granby	MA	Keri-Ann	Wenzel	413-467-7196
Groton	MA	Megan	Foster	978-448-1127
Hadley	MA	Dan	Zdonek	413-586-6320
Hampden	MA	Jane	Ferrentino	413-566-2151 ext.106
Hanover	MA	Elaine	Boidi	781-826-6401
Harvard	MA	Carol	Dearborn	978-456-4100 ext. 315
Hingham	MA	Erin	Walsh	781-804-2458
Hinsdale	MA	David	Zagorski	413-655-2300 ext. 315
Holden	MA	Rosemary	Scully	508-210-5516
Holland	MA	JoAnne	Higgins	413-245-7108 ext. 106
Hubbardston	MA	George	Bourgault	508-331-1153
Hudson	MA	JoAnne	McIntyre	978-568-9620
Kingston	MA	Meredith	Rafiki	781-585-0509
Lakeville	MA	Harald	Scheid	508-947-4428
Lawrence	MA	Alex	Vega	978-620-3192
Leominster	MA	William	Connor	978-534-7500
Lexington	MA	Rob	Lent	781-862-0500 ext. 84578
Longmeadow	MA	Jessica	Guerra	413-565-4115
Lowell	MA	Sue	Lemay	978-970-4212
Mansfield	MA	Dan	Brogie	508-851-6431
Marion	MA	Linda	Dessert	508-748-3518
Marlborough	MA	Patricia	Mespelli	508-460-3779
Mattapoissett	MA	Kathy	Costello	508-758-4106 ext. 3
Medford	MA	Ellen	Brideau	781-393-2435
Middleborough	MA	Ross	Lawrence	508-946-2410
Millbury	MA	Lee	Keomani	508-865-4732
Millis	MA	Teri	Gonsalves	508-376-7049 ext. 115

Monson	MA	Maryann	Wilkinson	413 267 4120
Nantucket	MA	Robert	Ranney	508-228-7200 ext 7037
New Salem	MA	Wayne	Hachey	978-544-2731
Newburyport	MA	Jill	Brennan	978-465-4403
Newton	MA	Jim	Shaugnessy	617-796-1160
Norfolk	MA	Don	Clarke	508-528-1120
North Attleborough	MA	Sheila	Scaduto	508-699-0117
Northbridge	MA	Robert	Fitzgerald	508-234-2740
Norwell	MA	Pam	David	781-659-8014
Norwood	MA	Timothy	McDonough	781-762-1240 ext.141
Oakham	MA	Priscilla	Johnson	508-882-5549 ext. 302
Orange	MA	Norman	Bartlett	978-544-1108
Otis	MA	Lyn	Minery	413-269-0100
Oxford	MA	Christopher	Pupka	508-987-6036
Palmer	MA	Rob	Leroux	413-283-2607
Paxton	MA	Kathleen	Stanley	508-799-7231 ext. 16
Pelham	MA	Lori	Turati	413-253-0734
Petersham	MA	Kelly	Garlock	978-724-6658
Phillipston	MA	Sue	Byrne	978-249-1732
Plainville	MA	Maurcen	Clarke	508-695-3010 ext. 14
Princeton	MA	Kathy	Stanley	978-464-2104
Quincy	MA	Colleen	Healy	617-376-1172
Randolph	MA	Christine	Lacerda	781-961-0906
Rehoboth	MA	Linda	Greaves	508-252-3352
Rochester	MA	Jana	Cavanaugh	508-763-5250
Rockport	MA	Diane	Lashua	978-546-2011
Rowley	MA	Sean	McFadden	978-948-2021
Russell	MA	Ted	Gloss	413-862-6214
Rutland	MA	Daymian	Bartek	508-886-4101
Sharon	MA	Jeffrey	Funk	781-784-1500 ext. 1150
Shrewsbury	MA	Chris	Reidy	508-841-8353
Shutesbury	MA	Kevin	Rudden	413-259-3790
Somerville	MA	Frank	Golden	978-921-6004
South Hadley	MA	Melissa	Couture	413-538-5027 ext. 105
Southampton	MA	Martha	Leamy	413-527-4741
Southbridge	MA	Wilfrid	Cournoyer	508-764-5404
Southwick	MA	Sue	Gore	413-569-0565
Spencer	MA	Linda	LeBlanc	508-885-7500 ext. 121
Sterling	MA	Debbie	Dreyer	978-422-8111 ext. 2313
Stockbridge	MA	Mike	Blay	413-298-4174 ext. 107
Stow	MA	Kristen	Fox	978-897-4597
Sturbridge	MA	Ann	Murphy	508-347-2503
Sutton	MA	Joyce	Sardagnola	508-865-8722
Swansea	MA	Thomas	Welch	508-324-6703
Taunton	MA	Lisa	Labelle	508-821-1011
Templeton	MA	Luanne	Royer	978-894-2760



Tewksbury	MA	Joanne	Foley	978-640-4330
Tisbury	MA	Ann Marie	Cywinski	508-696-4207
Wales	MA	Beverly	Poirier	413-245-7571 x 103
Walpole	MA	Dennis	Flis	508-660-7314
Warcham	MA	Jacqui	Nichols	508-291-3100 ext. 3169
Wayland	MA	Bruce	Morgan	508-358-3658
West Boylston	MA	Myra	Fortugo	774-261-4040
West Brookfield	MA	Elisabeth	DiMaio	508-867-1421 ext. 303
Westhampton	MA	David	Zagorski	413-203-3082
West Springfield	MA	Alex	Villar	413-263-3052
Westfield	MA	Robin	Johnson	413-572-6203
Westminster	MA	Robin	Holm	978-874-7401
Weston	MA	Eric	Josephson	781-786-5055
Westwood	MA	John	Curran	781-320-1003
Wilbraham	MA	David	Zagorski	413-596-2817 x209
Wilmington	MA	Karen	Rassias	978-658-3675
Winthrop	MA	Stephen	Roche	617-846-2716 ext. 1055
Woburn	MA	Andrew	Creen	781-897-5830
Worcester	MA	John	Valade	508-799-1024
Wrentham	MA	Ann	MacCarthy	508-384-5400
Yarmouth	MA	Andy	Machado	508-398-2231 ext. 1225
Arundel	ME	Beth	Newcombe	207-985-4201
Augusta	ME	Lisa	Morin	207-626-2320
Baldwin	ME	Ben	Thompson	207-699-2475
Bar Harbor	ME	Steve	Weed	207-288-3320
Bath	ME	Brenda	Cummings	207-443-8336
Berwick	ME	Paul	McKenney	603-534-2118
Biddeford	ME	Nick	Desjardins	207-284-9003
Boothbay Harbor	ME	Robert	Duplisea	207-633-3671
Brewer	ME	Mary	Stuart	207-989-7560
Brunswick	ME	Taylor	Burns	207-725-6650
Camden	ME	Kerry	Leichtman	207-236-3353 press 6
Casco	ME	David	Morton	207-627-4515 ext. 201
Cornish	ME	Katherine	Blake	207-625-4324
Cumberland	ME	John	Brushwein	207-829-2204
Eliot	ME	Martine	Painchaud	207-439-1813 ext. 111
Ellsworth	ME	Larry	Gardner, CMA	207-667-8674
Falmouth	ME	Jennifer	Phinney	207-699-5219
Freeport	ME	Robert	Konczal	207-865-4743 ext. 140
Fryeburg	ME	Katie	Haley	207-935-2805
Gardiner	ME	Curt	Lebel	207-582-6892 ext. 1107
Gorham	ME	Mike	D'Arcangelo	207-222-1600 ext. 1601
Harpswell	ME	Debbie	Turner	207-833-5771 ext. 114
Kennebunk	ME	Daniel	Robinson	207-985-2102 ext. 1310
Kennebunkport	ME	Werner	Gilliam	207-967-0402 ext. 102
Kittery	ME	Paul	McKenney	207-439-0452 ext. 306

Monmouth	ME	Laurie	Walker	207-933-2206 ext. 2
Mount Desert	ME	Kyle	Avila	207-276-5531 ext. 1
North Yarmouth	ME	Renee	Lachapelle	207-829-3705 ext. 209
Ogunquit	ME	Barbara	Kinsman	207-646-5140 opt 8 then 2
Old Orchard Beach	ME	George	Greene	207-934-5714 ext. 1535
Orono	ME	Mike	Noble	207-899-6911
Raymond	ME	Kaela	Gonzalez	207-655-4742 ext.133
Richmond	ME	Laurisa	Loon	207-737-4305 ext.208
Rockland	ME	Dawn	Overlock	207-594-0303
Rockport	ME	Kerry	Leichtman	207-236-6758
Sabattus	ME	Donna	Hayes	207-375-4331
Saco	ME	Kate	Kern	207-282-1611
Sanford	ME	George	Greene	207-646-6081
Scarborough	ME	Nicholas	Cloutier	207-730-4061
Skowhegan	ME	Leisa	Emery (Porter)	207-474-6903 ext. 119
South Portland	ME	Jim	Thomas	207-767-7604
South Thomaston	ME	Kevin	McCormick	207-596-6584
Standish	ME	Joseph	Merry	207-642-4572
Topsham	ME	Justin	Hennessy	207-725-1722
Waterville	ME	Paul	Castonguay	207-680-4200 ext. 4220
Wells	ME	Keeley-Anne	Lambert	207-646-6081
West Bath	ME	Robert	Morris	207-443-4342
Westbrook	ME	Jim	Thomas	207-854-0638 ext. 3
Windham	ME	Elisa	Trepanier	207-894-5900 ext.6512
Winslow	ME	Judy	Mathiau	207-872-2776 ext. 5205
Winthrop	ME	Linda	Huff	207-377-7206
Yarmouth	ME	Dawn	Madden	207-846-9036
York	ME	Rick	Mace	207-363-1005 ext. 1
Bloomington	MN	Matthew	Gersemehl	952-563-8708
Chisago County	MN	Chase	Peloquin	651-213-8563
Hennepin	MN	Jim	Atchison, CAE	612-348-4567
Acworth	NH	Kathi	Bradt	603-835-6879
Amherst	NH	Michele	Crowley	603-673-6041 ext. 202
Bedford	NH	Bill	Ingalls	603-792-1316
Belmont	NH	Jeanne	Beaudin	603-267-8300 ext. 124
Berlin	NH	Lise	Barrette	603-752-5245
Bethlehem	NH	Claudia	Brown	603-869-3351
Bow	NH	Monica	Hurley	603-228-1187 ext. 115
Bridgewater	NH	Terry	Murphy	603-744-5055
Candia	NH	Linda	Chandonnet	603-483-5985
Charlestown	NH	Kelly	Wright	603-826-4400
Chesterfield	NH	Board of	Selectmen	603-363-4624
Claremont	NH	Bob	McCarthy	603-542-7004 x2
Concord	NH	Kathy	Temchack	603-225-8550
Derry	NH	Mark	Jesionowski	603-432-6104 ext. 5499
Dunbarton	NH	Line	Comeau	603-774-3541 ext. 102

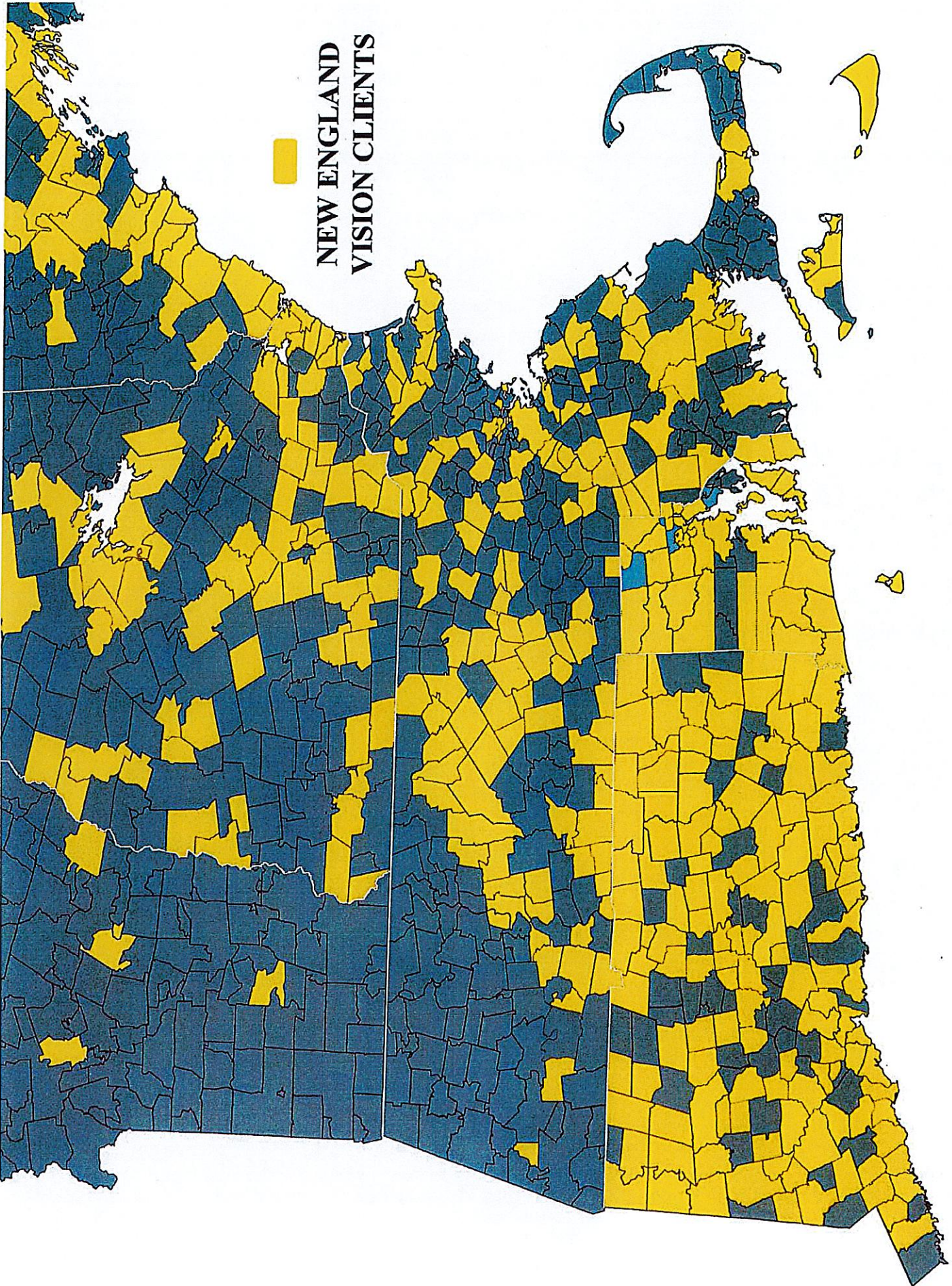
Durham	NH	Jim	Rice	603-868-8064
Epping	NH	Joyce	Blanchard	603-679-5441 ext. 20
Exeter	NH	Janet	Whitten	603-778-0591 ext. 110
Fremont	NH	Heidi	Carlson	603-895-9035 ext. 10
Goffstown	NH	Scott	Bartlett	603-497-8990 ext. 113
Grantham	NH	Melissa	White	603-863-6021 ext. 301
Greenland	NH	Matt	Scruton	603-431-7111 ext. 100
Hampton	NH	Beth	Frongillo	603-929-5837
Henniker	NH	Helga	Winn	603 428 3221 ext. 2
Hinsdale	NH	Kathryn	Lynch	603-336-5727 ext. 17
Hollis	NH	Connie	Cain	603-465-2209 ext. 105
Hooksett	NH	Jon	Duhamel	603-268-0003
Jaffrey	NH	Erlene	Lemire	603-532-7445 ext. 102
Keene	NH	Dan	Langille	603-352-2125
Laconia	NH	Deb	Derrick	603-527-1268
Lincoln	NH	Johnna	Hart	603-745-8971
Littleton	NH	Amy	Hatfield	603-444-3996 ext. 12
Londonderry	NH	Ashley	Dumont	603-432-1100 x190
Lyme	NH	Diana	Calder	603-795-4639
Manchester	NH	Bob	Gagne	603-624-6520 ext. 6795
Meredith	NH	Jim	Commerford	603-677-4226
Milford	NH	Marti	Noel	603-249-0615 ext. 240
New Durham	NH	Scott	Kinmond	603-859-2091
Newington	NH	Susan	Henderson	603-436-7640
Newmarket	NH	Steve	Fournier	603-659-3073 ext. 1313
North Hampton	NH	Mike	Pelletier	603-964-8087
Pelham	NH	Susan	Snide	603-508-3080
Pembroke	NH	Elaine	Wesson	603-485-4747 ext. 213
Plaistow	NH	Lori	Sadewicz	603-382-5200 ext. 230
Portsmouth	NH	Rosann	Maurice-Lentz	603-610-7212
Raymond	NH	Donna	Giberson	603-895-4735 ext. 102
Rindge	NH	David	DuVernay	603-899-5181 ext. 113
Rochester	NH	Jonathan	Rice	603-332-5109
Rye	NH	Kristin	Hanlon	978-887-6000 ext. 142
Salem	NH	Chris	Ruel	603-890-2018
Sandown	NH	Lynn	Blaisdell	603-887-8392
Seabrook	NH	Angela	Silva	603-474-2966
Strafford	NH	Linda	Pape	603-664-2192 ext. 5
Troy	NH	Joe	Byk	603-831-3228
Wilton	NH	Todd	Haywood	603-496-7293
Windham	NH	Jennifer	Zins	603-434-7530 ext. 3006
Carmel	NY	Glenn	Droese	845-628-1500
New York City	NY	Howard	Wong	212-291-2572
Bradford County	PA	Donna	Roof	570-265-1714 ext. 2827
Crawford County	PA	Joe	Galbo	814-333-7305
Greene County	PA	Mary Ann (Lou)	Lewis	724-852-5241

Tioga County	PA	Joshua	Zeyn	570-723-8149
Warren County	PA	Brian	Bull	814-728-3423
Burrillville	RI	Jennifer	Mooney	401-568-4300 ext. 126
Charlestown	RI	Ken	Swain	401-364-1233
Cranston	RI	Mark	Capuano	401-780-3188
Cumberland	RI	Ken	Mallette	401-728-2400 ext. 149
East Providence	RI	Sarah	Frew	401-435-7500 ext. 11060
Exeter	RI	Kerri	Petrarca	401-294-5734
Foster	RI	Kaitlyn	Boyer	(401) 392-9206
Glocester	RI	Jessica	Parker	(401) 568-6206 x213
Hopkinton	RI	Liz	Monty	401-377-7780
Jamestown	RI	Christine	Brochu	401-423-9802
Johnston	RI	Kim	Gallonio	401-553-8824
Lincoln	RI	Brenda	Keeble	401-333-8448
Little Compton	RI	Denise	Cosgrove	401-635-4509
Middletown	RI	George	Durgin	401-847-7300
New Shoreham	RI	Joan	Wholey	4014663217
North Kingstown	RI	Deb	Garneau	401-268-1530
Pawtucket	RI	Robert	Burns	401-728-0500 ext. 218
Portsmouth	RI	Matt	Helfand	401-683-1536
Providence	RI	Elyse	Pare	401-680-5229 ext. 5495
Richmond	RI	Elizabeth	Fournier	401-539-9000 ext. 7
Smithfield	RI	Chris	Celeste	401 233-1000 x 6
South Kingstown	RI	Mark	Capuano	401-789-9331 ext 1222
Warwick	RI	Neal	Dupuis	401-738-2000 ext. 4
Westerly	RI	Dave	Thompson	401-348-2544
Woonsocket	RI	John	Pagliami	401-767-9280
Albemarle County	VA	Peter	Lynch	434 296 5856
Charlottesville City	VA	Jeffrey	Davis	434-970-3136
Chesapeake City	VA	Greg	Daniels, CAE	757-382-6756
Culpeper County	VA	William "Jason"	Kilby	540-727-3411
Essex County	VA	Tom	Blackwell	804-443-4737
Gloucester County	VA	Dan	Thomas	804-693-1323
Halifax County	VA	Brenda	Powell	434-476-3185
Hanover County	VA	Richard	Paul	804-365-6027
Harrisonburg City	VA	Lisa	Neunlist	540-432-7795
Henrico County	VA	Jason	Hughes	804-501-5346
Henry County	VA	Linda	Love	276-634-4611
King William County	VA	Karena	Funkhouser	804-769-4941
Manassas City	VA	Doug	Waldron	703-257-8298
Martinsville City	VA	Ruth	Easley	276-403-5130
New Kent County	VA	Cindie	Reddington	(804) 966-9610
Northampton County	VA	Charlene	Gray	757-678-0440 ext. 506
Poquoson City	VA	Stephenie	Love	757-868-3080
Portsmouth City	VA	Patrick	Dorris	757-393-8631 x2161
Prince George County	VA	Brian	Gordineer	804-722-8639

Rockingham County	VA	Matt	Armstrong	540-564-3145
Salem City	VA	Justin	Kuzmich	540-378-0175
Shenandoah	VA	Kathy	Block	540-459-6174
Staunton City	VA	Charley	Haney	540-332-3827
Suffolk City	VA	Billy	Butt	757-514-7479
Waynesboro	VA	Mary	Honbarrier	(540) 942-6722
Williamsburg City	VA	Derek	Green	757-220-6185
York County	VA	Maria	Kattman	757-890-3720
Bridgewater	VT	Spencer	Potter	(802) 672-3334
Colchester	VT	Robert	Vickery	802-264-5671
Hartford	VT	Joe	Turner	(802) 478-1109
Killington	VT	Chet	Hagenbarth	802-422-3241
Newport City	VT	Spencer	Potter	802-334-6992
Pittsford	VT	Lisa	Wright	(802) 483-6500 ext 15
Sheffield	VT	William	St. Peter	802-626-8862
Stratton	VT	Candie	Bernard	802-896-6184
West Rutland	VT	Lisa	Wright	802-438-2263
Waukesha City	WI	Paul	Klauck	262-524-3510

*Revised 12/1/2023*





**NEW ENGLAND  
VISION CLIENTS**





## *Vision Government Solutions Public Relations Program*

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

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

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

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

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



 **VISION**  
GOVERNMENT SOLUTIONS  
*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.

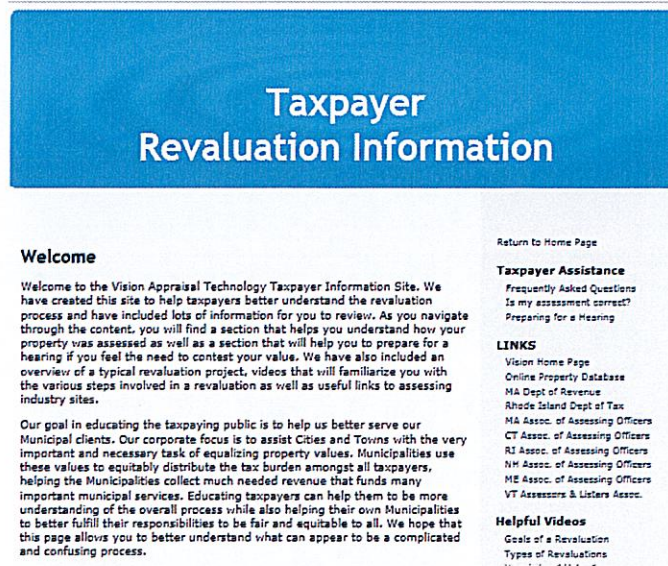
5. **Specialty Items:** Priced outside of the contract.

- 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.



**Taxpayer Revaluation Information**

**Welcome**

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

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

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**Taxpayer Assistance**

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

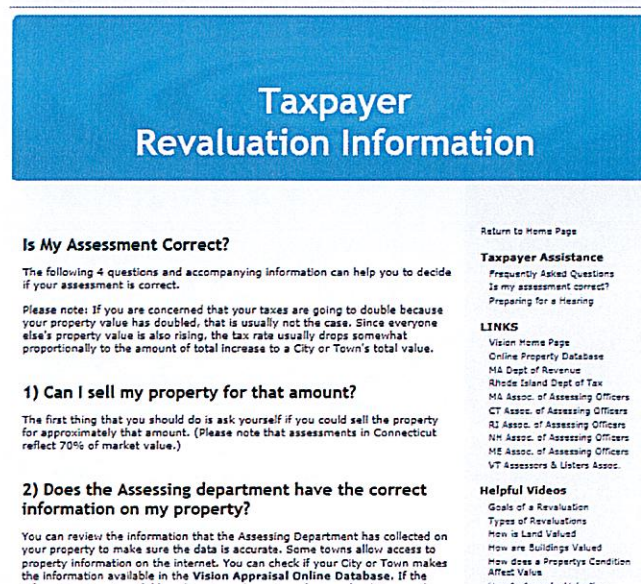
**LINKS**

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

**Helpful Videos**

[Goals of a Revaluation](#)  
[Types of Revaluations](#)

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



**Taxpayer Revaluation Information**

**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 proportionally to the amount of total increase 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

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[VT Assessors & Listers Assoc.](#)

**Helpful Videos**

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



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

**Danbury, CT  
Revaluation Information**

**Welcome**

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**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](#)
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- [VT Assessors & Listers Assoc.](#)

**Helpful Videos**

- [Goals of a Revaluation](#)

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

**Taxpayer  
Revaluation Information**

**Goals of a Revaluation**



Click below to view a copy of the chart referred to in this Video.

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**Taxpayer Assistance**

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

**LINKS**

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**Helpful Videos**

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

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

# **Stephen P. Whalen**

25 Lincoln Street  
Weymouth, MA 02191  
Cell (617) 462-6091

## **Career Profile**

Senior Project Manager for Vision Government Solutions with more than 35 years' experience in real estate valuation. Responsible for the on-time and on-budget oversight of revaluation projects throughout New England. Vision Government Solutions is a real estate revaluation company with over three hundred clients throughout New England.

### **Appraisal Experience**

**Vision Government Solutions**  
**Hudson, MA**  
**Project Manager**  
**(2005 to Present)**

Responsibilities include project management, residential and commercial property valuation, consulting, and court work. Specific expertise in the valuation of commercial and industrial properties. Responsible for handling over a dozen town/city contracts annually.

### **Other Professional Experience**

**Weymouth, MA Board of Assessors member (2023- Present)**

**Hingham, MA William Raveis Real Estate**  
**Real Estate Realtor (2014-2020)**

**Saugus, MA – Assessor's Office**  
**Property Appraiser (1999 – 2014)**

Performs inspections of all residential and commercial properties that have filed building permits and re-inspection of properties that have filed for a tax abatement. Additional responsibilities include income and expense analysis and commercial and industrial valuation. And implement the D.O.R. commercial required reval update. Including land values, cost modeling, income and expense analysis, and final value correlation.

**West Newbury, MA – Assessor's Office**  
**Property Appraiser (2005 – 2012) (2020 – 2021)**

Responsibilities included field review and verification of all residential properties that have filed building permits and re-inspection of properties that had sold within the past year. Also performed all commercial analysis for D.O.R. required state revaluation. Including setting of land values, cost modeling, commercial table building, and all required D.O.R. spreadsheets.

**Wellesley, MA – Assessor's Office**  
**Property Appraiser (2008 – 2012)**

Performed field review and verification of all residential properties that filed building permits. Re-inspection of properties that filed for tax abatements or had sold within the last year.

**CLT/TYLER  
Tolland, CT  
Senior Project Manager (1987 – 2005)**

Supervised several revaluation projects throughout New England and is experienced in all phases of the revaluation process. Responsibilities included hiring and training of both colleagues and clients, defense of values at both informal and formal levels, establishing market rents for commercial and industrial properties based on income and expense reports, and utilizing the income, cost, and sales approaches to value for state mandated revaluations.

**Education**

**University of Massachusetts – Boston, MA**  
Bachelor of Arts Degree – Economics  
**University of Massachusetts – Dartmouth, MA**  
Liberal Arts and Computer Science Courses

**Massachusetts Association of Assessing Officers**  
Course 1: Comparable Sales Approach

**International Association of Assessing Officers**  
Site Analysis and Evaluation  
Introduction to the Cost Approach to Value  
Introduction to the Market Approach to Value  
Course 1: Fundamentals of Real Property Appraisal  
Course 2: Income Approach to Valuation  
Course 301: Mass Appraisal of Residential Property  
Course 400: Assessment Administration

**Other Courses/Seminars**

2019 NH State Statutes Course#1 (40) hours  
2019 NH State Statutes Course#2 (32) hours  
The Rushmore Model for Hotel Valuation  
Complex Industrial Property  
Mass Appraisal of High-End Residences  
Valuation of Regional Malls and Golf Courses  
Specialty Properties: Hospital Exemptions and Assisted Living  
Valuation Telecommunications Property and Wireless Technology

**The Appraisal Foundation**  
National Uniform Standards of Professional Appraisal Practice Course (USPAP 2020-2021)

**Professional Real Estate Training Institute**  
Completed forty (40) hours of pre-licensure salesperson education

**Computer/Software Experience**

Experienced in using multiple CAMA revaluation company's software.

**Certifications/Licenses**

MA Licensed Real Estate Salesperson #00953264  
CT Certified Residential Appraiser  
NH Certified Property Assessor Supervisor  
VT Certified Supervisor



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**SANDRA SCHMUCKI**

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**PROFESSIONAL EXPERIENCE**

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

**2008 – Present, Project Manager**

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

**1999 – 2001, Staff Appraiser**

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

**1998 – 1999, Crew Chief**

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

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

**1996 – 1998, Accounting Manager**

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

**1987 – 1996, Accountant/Accounting Supervisor**

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

**EDUCATION**

**University of Massachusetts- Lowell, MA**

1987 Bachelor of Science Degree: Business

**SPECIAL QUALIFICATIONS**

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

**State of New Hampshire DRA Certified Real Estate Appraiser** 2005, Assessor Assistant 2010, DRA-Certified Property Assessor 2015, DRA-Certified Property Assessor Supervisor 2020-2024

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

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

**IAAO Course 201 Appraising Income Properties:** Certificate of Completion 2002

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

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

**MBREA Course – Basic Appraisal Principles:** Certificate of Completion 2018

**MBREA Course – Basic Appraisal Procedures:** Certificate of Completion 2018



# **LAWRENCE CHAYER**

## **PROFESSIONAL EXPERIENCE**

### **VISION GOVERNMENT SOLUTIONS, INC., HUDSON, MA**

#### **December 2021 – Present, Data Collector**

Responsibilities include accurately locating, identifying and measuring the exterior dimensions of assigned properties. Making a thorough inspection of the interior of each property and accurately recording all pertinent data used in the valuation of the property.

### **LOCAL UNION 550, BOSTON, MA**

#### **April 2018 – September 2021, Sprinkler Fitter**

Install and maintain fire sprinkler systems

### **LOWE'S HOME IMPROVEMENT, PORT ORCHARD, WA**

#### **January 2013 – October 2013, Delivery Driver**

Delivery and installation of large appliances

## **EDUCATION**

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

Pittsfield NH High School Diploma

# **CHRIS RUEL**

## **PROFESSIONAL EXPERIENCE**

### **VISION GOVERNMENT SOLUTIONS, INC., HUDSON, MA**

#### **July 2022–Present, Senior Appraiser**

Responsible for hands-on final valuation and review process, completing a full field review on-site of appraisal related data to ensure 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. Responsible for the coordination of timelines for sales inspections, images, and permit field work

### **SALEM, NH ASSESSOR'S OFFICE, SALEM, NH**

#### **July 2019 – July 2022, Chief Assessor**

Management of all workflows within the Assessing Office. Management of Town revaluation processes. CAMA table maintenance, statistical testing of property stratifications, and spread sheet analysis to ensure proper maintenance of CAMA relevancy. Defense of values included Superior Court mediation, BTLA mediation, and negotiations.

### **WESTFORD, MA ASSESSOR'S OFFICE, WESTFORD, MA**

#### **April 2016 – July 2019, Assistant Assessor**

Facilitated Board of Assessor's meetings with Principal Assessor, processed exemption, credits, deferrals, abatements and provided Board with information concerning property in order to make decisions and render opinions. Applied statistical analysis, sales review, and other traditional analysis in order to manage valuations (Quickly changing site values/Land Curve Measures). Analysis/interpretation of I&E data and organized into a comprehensive database to maintain relevant market metrics and cap rates applied to assessing methodologies.

### **PORTSMOUTH, NH ASSESSOR'S OFFICE, PORTSMOUTH, NH**

#### **February 2014 – April 2016, Appraiser II / Deputy Assessor II**

Managed communication between Assessing Department and revaluation contractor team, developed assessing neighborhoods, assisted commercial revaluation contractor providing data concerning cap rate development, managed with City Assessor utility revaluation team to redefine objectives and reach goals.

### **Certified General Appraiser NH & MA**

**1994 - Present**

**EDUCATION**

Massachusetts Institute of Technology (MIT) 6/2016; Certificate in Real Estate Development and Finance

MBA and MS Business Education, Southern NH University

BS Economics/Finance, Southern NH University

The Appraisal Foundation, Certified AQB USPAP Instructor

# TODD E. BEETY

## PROFESSIONAL EXPERIENCE

### **Vision Government Solutions, Inc., Hudson, MA**

#### **March 2023–Present, Data Collector**

Responsibilities include accurately locating, identifying, and measuring the exterior dimensions of assigned properties. Making a thorough inspection of the interior of each property and accurately recording all pertinent data used in the valuation of the property.

### **Mermaid Transportation**

#### **October 2015, Medical Transport Driver**

### **Best Transit**

#### **September 2015, Medical Transport**

### **North East Mobile Health Service**

#### **2014-2015, Medical Transport**

### **Maine Smoke Shop**

#### **2012-2013, Cashier/Asst. Manager**

### **The Irrigation Company**

#### **1998-Present, Owner**

The company designs, installs and maintains residential and commercial irrigation systems in York and Cumberland County. As the owner of the company my responsibilities include:

Verify water pressure and flow rate.

Design a system that will function within the customer's parameters.

Ensure a matched precipitation rate for turf and flower beds.

Manage inventory and personnel to maintain growth in a competitive market.

### **Housing Inspector**

#### **1998-Present**

Independent Contractor to Federal Emergency Management Agency (FEMA).

Certified to provide housing inspection during federally declared disasters. Responsibilities include:

Schedule, inspect and return inspection within 72 hours. (Currently 34 hrs.)

Maintain above an 90% quality rate. (Currently 92%)

Communicate to applicant FEMA grant, loan and assistance programs.

### **Todd E. Beety Appraisals**

#### **1981-1998**

Appraise Real Property for Financial Institutions in Maine. Responsibilities include:

Schedule, inspect and value real estate.

Data collection of comparable properties.

Appraised Personal Property for municipalities in Maine. Responsibilities include:

Inventory business equipment for tax purposes.

Maintain pricing library used in valuation.

Defend tax values to business owners.

**Real And Personal Property Lister**

**1975 -1981**

Employed by United Appraisal, Conn., Cole, Layer and Trumble, Ohio and S.L.F. Inc., Maine.  
Gathered valuable knowledge and information on appraisal practice and techniques

**EDUCATION**

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

**1975 Graduate So. Portland High School**

**1977 Certified Maine Assessor**

**Yearly Assessing re-certification programs**

**1996 Disaster Housing Inspector**

**1996 to2011 Yearly inspector re-certification programs**

**1998 Certified Irrigation Design by Irrigation Association**

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

## **PROFESSIONAL EXPERIENCE**

### **2016 – Present, Vice President Appraisal Operations**

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

### **1997 – 2015, District Manager**

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

### **1992 – 1996, Director of Fee Appraisal Division**

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

### **1990 – 1992, Commercial Senior Appraiser**

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

### **1987 – 1990, Staff Appraiser**

Appraisal assignments throughout New England and New Jersey.

## **CAMERON BISHOP FINANCIAL SERVICES, STONEHAM, MA**

### **1986 – 1987, Fee Appraiser**

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

### **1985 – 1986, Builder**

## **EDUCATION**

### **University of Massachusetts, Amherst, Massachusetts**

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



**Western New England University, Springfield, Massachusetts**

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

**Appraisal Institute**

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

**International Association of Assessing Officers**

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

**SPECIAL QUALIFICATIONS**

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

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

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

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

**Massachusetts Appellate Tax Board:** Qualified as Expert Appraisal Witness

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

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

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

**Vermont Department of Taxes:** Certified as Revaluation Project Supervisor

**Virginia Department of Taxation:** Certified Professional Assessor

**Ujenzi Trust:** Treasurer and Board of Director

**State of Maine:** Certified Maine Assessor (CMA)

**State of Massachusetts:** Certified General Appraiser #660

**State of New Hampshire:** Certified General Appraiser #154

**State of Rhode Island:** Certified General Appraiser #A00325G

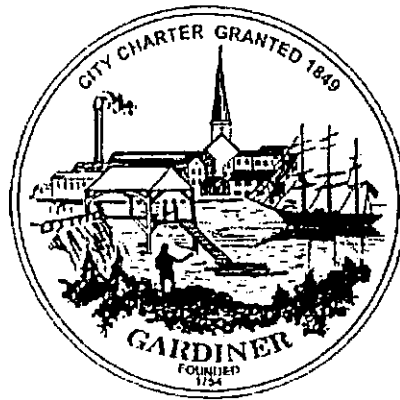
**State of Maine:** Certified General Appraiser

**State of Connecticut:** Certified General Appraiser

**State of Virginia:** Certified General Appraiser #4001017831

 ORIGINAL

# City of Gardiner, Maine



## Proposal for a 2027 Property Revaluation Project

### KRT Appraisal

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

December 7, 2023

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December 7, 2023

Curt Lebel  
Gardiner Assessing Department  
6 Church Street  
Gardiner, ME 04345

### Price Proposal

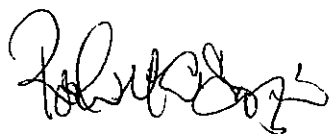
Dear Mr. Lebel:

KRT Appraisal (KRT) is pleased to submit a proposal in response to your Request for Proposal (RFP) for a Property Revaluation Project. KRT will provide all services necessary to complete the revaluation, while conforming to all Maine State Laws.

Based on the estimated total real estate parcels (2,711), total personal property accounts (265) and scope of services contained in this proposal, the cost for a 2027 Property Revaluation Project is **Two Hundred Twenty Five Thousand Dollars (\$225,000)** using the City's Vision CAMA system. This cost includes five (5) days for defense of value to any Local/State Board. The additional cost for defense of values above the included five (5) days is **One Hundred Twenty Five Dollars per Hour (\$125.00/Hour)**.

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

Sincerely,



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

## BID PROPOSAL DOCUMENT

This document is to be included in the bid package, clearly marked "PROPOSAL – PROPERTY REVALUATION PROJECT".

Service	Total Price
1. Revaluation of all real property	\$ <u>204,000.00</u>
2. Revaluation of all personal property	\$ <u>21,000.00</u>
3. Digital imaging services (If not included in #1 above)	\$ <u>Included</u>
4. Web services during the revaluation public disclosure period (if not included in #1 above)	\$ <u>Included</u>
5. Defense of values post commitment (5 Days Included)	\$ <u>125.00/Hour</u>
6. Any other services available	\$ <u>N/A</u>

The above prices are to be considered separate, unbundled amounts. The City of Gardiner reserves the right to select or reject any or all prices, which ever arrangement it believes best serves its interests. The revaluation of real and personal property is to include data, loaded and operational in the City's licensed Vision CAMA software.

December 7, 2023

Curt Lebel  
Gardiner Assessing Department  
6 Church Street  
Gardiner, ME 04345

**Letter of Transmittal**

Dear Mr. Lebel:

The following report is submitted in response to your Request for Proposals (RFP), for the City of Gardiner, Maine. This proposal will remain in effect for at least ninety (90) days from the deadline for this proposal. KRT has read the RFP and fully understands the scope of services requested. KRT shall provide all of the services needed to ensure a successful revaluation.

This proposal will serve to provide the City with our qualifications and experience in providing similar services in the past. KRT has the capability to perform the services requested in the RFP while meeting all established deadlines and quality expectations in an effective and efficient manner.

As a small company, KRT's upper management will be solely responsible for all aspects of the valuation process. Our experience, solid references, and proven track record make KRT an excellent candidate to complete the revaluation.

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

Sincerely,



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



## Why Hire KRT Appraisal?

It is with great pleasure that KRT Appraisal (KRT) submits a proposal for a 2027 Property Revaluation Project. When it comes to selecting a revaluation firm, KRT knows you have many choices, so what sets KRT apart from the competition? KRT has some of the most experienced team members in New England. KRT offers a personalized approach and level of service that is unmatched by any firm, large or small. KRT is dedicated to completing projects on time and with the utmost quality. KRT is always client focused and takes pride in our work and the relationships we build with clients. KRT's goal is to offer superior services at a competitive price.

### **Strengths and Advantages of KRT Appraisal**

#### KRT Ownership Heavily Involved in Revaluation Process

KRT was founded by Ken Rodgers and Rob Tozier, two former large appraisal firm managers that know clients deserve more than being just another dollar sign. We are heavily involved in all aspects of the revaluation process, from supervising data collection to running analysis and setting values. No value goes out the door without having been reviewed in some capacity by one of us.

#### Education and Experience

KRT strives to bring attained knowledge and experience to clients and provide quality over quantity, shedding the large overhead of CEO/CFO salaries. KRT's employees are all certified in the individual states they work in. On average, each appraiser and manager complete over fifteen hours of continuing education credits annually. KRT's upper management has on average almost thirty years of appraisal experience and has successfully implemented over one hundred revaluations of all scopes and sizes. KRT has extensive experience with waterfront properties, knowledge of both commercial and residential properties, and has valued both rural and urban communities. Having a team with extensive knowledge and specialties allows us to ensure the project is done correctly from the ground up to completion. We are one of the only companies in the area that uses a *Zeb 3D Laser Scanner* and employees trained to use it. It allows us to precisely measure complex commercial or residential properties with speed and accuracy to minimize errors that can result in a loss of revenue or costly abatements.

#### CAMA Versatility

All KRT employees are experienced and trained on multiple CAMA systems including Vision's Appraisal Vision (all versions), Patriot's AssessPro (all versions), Avitar, and Trio.

KRT Appraisal is a small company that treats its employees like family and each client like they are the only client. This mindset, along with unwavering principles, have helped build KRT from a company of two owners and a client list of zero in 2010, to a family of twenty employees and a growing list of over sixty past and current clients.

**STATEMENT OF SERVICES**  
**2027 PROPERTY REVALUATION PROJECT**

**1) PROFILE OF GARDINER, MAINE**

**1.1:** Gardiner is a city in Kennebec County, Maine, United States. The population was 5,961 at the 2020 census. Popular with tourists, Gardiner is noted for its culture and old architecture. Gardiner is a nationally accredited Main Street America community. It is included in the Augusta, Maine micropolitan New England City and Town Area. Gardiner contains approximately 2,711 parcels and 265 personal property accounts.

**2) SCOPE OF THE PROJECT**

**2.1:** Subject to the terms and conditions of this Statement of Services, KRT shall measure, list and update the value for all classes of property located in the City of Gardiner as identified in Section 1 while conforming to Maine State Law and the guidelines in determining "Just Value". The determined "Just Value" will be reflected as of April 1, 2027.

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

**2.3:** To describe the revaluation process, the scope will be divided into five (5) main groups of project requirements, each extensively detailed. The five (5) main groups are as follows: Data Collection, Analysis, Field Review, Informal Hearings, and Reporting. KRT welcomes Assessor involvement in any of these phases to ensure the project is being completed in a manner sufficient to the City.

**A) Data Collection**

**2.A.1:** Before starting the revaluation, KRT shall meet with the City Assessor and local officials to review the Data Collection Manual to ensure that all data will be collected according to the City's established specifications. If no such manual exists, KRT will provide one to be tailored to the needs of the City.

**2.A.2:** KRT will conduct an on-site exterior measurement and attempt an interior inspection of all properties within the City. All KRT employees will have proper identification (KRT Badge or City ID) as well as a letter from the City with a vehicle description and purpose for visiting the property. If entrance is not gained after the initial visit and one (1) attempted callback, KRT will mail a letter requesting a phone call for an interior inspection appointment.

**2.A.3:** KRT will verify all information on the property record card. This includes all construction detail, sketch measurements, year built, property condition, outbuildings/extra features, sale conditions, and land detail information. A visit history code with the KRT employee's initials and date will be added for each visit to the property.

**2.A.4:** KRT will input all data changes at each stage of the revaluation project into the Vision CAMA system.

**2.A.5:** KRT will take phone calls from letters sent and schedule callback appointments using a schedule convenient for the City and the property owners.

**2.A.6:** KRT will update the City's image file by taking a new photo of all improved properties within the City. This photo will be at least six (6) megapixels and loaded into the Vision CAMA System.

## **B) Analysis**

**2.B.1:** KRT will analyze all qualified sales for the time period of two (2) years prior to the assessment date of April 1, 2027. If sufficient data exists, KRT will focus on the most recent year of sale data. All strata tested (style, size, sale price, age, sale date, neighborhood, and grade) will be within five percent (5%) of the desired median for all classes of property.

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

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

**2.B.4:** Residential building values will be generated utilizing a "market adjusted" cost approach. To achieve this, a cost analysis will be done to determine the Replacement Cost New (RCN) for all building types within the City. Factor's to be considered include the style, grade or quality, size, number of bedrooms and bathrooms, and other various amenities that affect value. Once the RCN is established, an analysis of the physical condition of the property relative to its age will be conducted. The resulting depreciation tables will calculate a depreciation percentage. Once the depreciated building value is established, it is added to any outbuildings and the land value to come up with the overall market value. All values and tables are generated directly from the sales analysis.

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

adjusted" cost value. KRT shall be responsible for costs associated with mailing Income and Expense forms.

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

### **C) Field Review**

**2.C.1:** KRT will review all sale properties in the field. The personnel conducting this phase of the project will have a minimum of five (5) years of mass appraisal experience and be a Certified Maine Assessor (CMA).

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

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

### **D) Informal Hearings**

**2.D.1:** Once the preliminary values have been approved by the City KRT will develop an Assessment Change Notice. The notice will, at a minimum, contain the following information: brief description of the assessment process, how to appeal, the phone number to call to schedule a hearing, parcel MBLU, parcel ID number, property location, owner's address, and the total parcel value.

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

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

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

**2.D.5:** KRT will hold hearings for a period of time that ensures any property owner who calls during the specified timeframe will get the chance to have an informal hearing. KRT will offer phone appointments to accommodate property owners who are unavailable to meet in person during the day.

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

### **E) Reporting/Defense**

**2.E.1:** KRT will submit to the City one (1) assessment manual titled "*Assessment Manual, City of Gardiner, Maine*" which contains procedures, analysis, and standards, as well as classifications for all types of property. Delivery of this final USPAP documentation manual will be made by October 31, 2027.

**2.E.2** KRT shall provide five (5) days of defense of value services for appeals to any Local, County or State Board for no additional cost. For days above the first five, refer to the Price Proposal outlining costs in Section A of this proposal.

### **3) PUBLIC RELATIONS**

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

**3.2:** KRT, if requested by the City, will hold informational meetings for Gardiner taxpayers. This meeting(s) will serve to inform and educate the public of the following points:

- a) Necessity of a revaluation.
- b) Progress and status of the project.
- c) Goals of the project.
- d) Roles of the City and KRT.
- e) Qualifications of KRT.
- f) Necessity of taxpayer cooperation.
- g) Disclosure aspects throughout the project.
- h) On-going nature of completed system.
- i) Any other related revaluation information.

**3.3:** KRT shall make available the project supervisor for all speaking endeavors and meetings with various groups as a means of establishing and promoting understanding and support for the project. All prepared releases shall be submitted to the assessor for review prior to public dissemination.

**3.4:** KRT shall post on its website information regarding the project. Such information shall include an initial Press Release, a Frequently Asked Questions (FAQ) pamphlet, a Microsoft PowerBI analysis showing analysis before and after the revaluation, a list of personnel with data collector photos and lists of final values once the project is complete. This information will remain available for public viewing for at least six (6) months following the completion of the revaluation.



#### 4) PROGRESS AND CONTROL

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

<u>Task</u>	<u>Start Date</u>	<u>Completion Date</u>
Execution of Contract		03/27/24
Start-Up Meeting	04/01/24	04/05/24
Public Relations	On-going	
Data Collection/Callbacks	04/08/24	03/17/27
Data Entry	04/08/24	03/19/27
Field Review Sales	03/22/27	04/02/27
Update Tables	04/05/27	04/30/27
Field Review	05/03/27	05/21/27
Final Valuations	05/24/27	06/11/27
City Review	06/14/27	06/25/27
Impact Notices	06/28/27	07/02/27
Informal Hearings	07/05/27	07/16/27
Hearing Review	07/19/27	07/23/27
Final Products Delivered	07/26/27	07/30/27
Project Completion		07/30/27

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

4.3: The City shall charge KRT a penalty of \$600 per calendar day for failure to turn over all deliverables, excluding the USPAP Manual, required by the contract deadline date of July 30, 2027.

#### 5) EQUIPMENT AND SUPPLIES

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

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

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

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

The City shall further assist KRT in providing or making available any information in its' possession or is conveniently available that may be required for the execution of the project.

**5.3:** KRT will be responsible for delivering the following to the City:

- a) Database in good working order with updated values.
- b) A USPAP compliant manual detailing the methodology used on this project.

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

## **6) PAYMENT SCHEDULE**

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

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

**6.3:** The City is required to make timely percentage payments on the contract to KRT, within thirty (30) days, equal to eighty five percent (85%) of the contract amount represented by work completed during the month as finally determined by them.

**6.4:** If the City determines that KRT's invoice is inaccurate, the City shall give written notice specifying exactly which portion(s) is found to be unsatisfactory. KRT shall make every effort to correct the inaccuracy. The City shall retain the right to delay payment only for the specified item(s), until said item(s) is resolved to the satisfaction of both the City and KRT. Upon satisfactory resolution, the City shall pay KRT said amount due, less fifteen percent (15%).

**6.5:** The fifteen percent retainage shall be released using the following schedule:

- a) Five percent (5%) before the Preliminary values are delivered to the City before the hearings.
- b) Five percent (5%) before the final values are delivered to the City after the hearings.
- c) Five percent (5%) once the revaluation USPAP manual has been received by the City.

## 7) INSURANCE

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

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

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

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

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

## 8) TERMINATION

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

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

**9) ASSIGNMENT OF CONTRACT**

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

**KRT APPRAISAL**  
**COMPANY PROFILE**

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

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

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

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

**KRT APPRAISAL  
QUALIFICATIONS/REFERENCES**

**1) PROJECT STAFFING**

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

<b>Title</b>	<b>Name</b>	<b>Years of Experience</b>
Project Manager	Robert Tozier, CMA	23 Years
Appraiser	Kenneth Rodgers, CMA4	33 Years
Appraiser	Kevin Leen, CMA	38 Years
Data Collector	Doug Rollins	9 Years
Data Collector	Gerry Lortie	7 Years
Data Collector	Dan Bourkas	1 Year

Resumes of each KRT associate are provided in Section G. Each resume contains prior work experience, positions held, responsibilities of each position, appraisal/assessing education and professional affiliations for each individual. All KRT associates employed on this project shall be at least eighteen years old.

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

**2) REFERENCES/CURRENT ASSIGNMENTS**

KRT has completed dozens of revaluations/updates over the past five years. KRT has valued some of the most diverse communities in New England, including many Cities of similar size. The following page contains a complete list of those projects as well as KRT's current commitments.



## KRT Appraisal Current/Completed Work Over Five Years

<u>City/Town</u>	<u>Approx Size</u>	<u>Services</u>	<u>Year</u>	<u>Contact</u>	<u>Phone Number</u>
Raymond, ME	3,900	Full Revaluation	2026	Curt Lebel	(207) 655-4742
Bangor, ME	11,100	Full Revaluation	2026	Phil Drew	(207) 992-4215
Oakland, ME	3,530	Full Revaluation	2026	Nichole Stenberg	(207) 465-2750
Danville, NH	2,110	Cyclical Revaluation (2023-2026)	2026	Kimberly Burnham	(603) 382-8253
South Berwick, ME	3,400	Full Revaluation	2025	Verna Sharpe	(207) 384-3010
Rockport, ME	6,260	Full Revaluation	2025	Kerry Leichtman	(207) 236-6758
Monmouth, ME	2,775	Full Revaluation	2025	Justin Poirier	(207) 481-9400
Waterford, ME	1,925	Full Revaluation	2025	John Bell	(207) 583-4403
Farmington, ME	3,705	Full Revaluation	2025	Steve Eldridge	(207) 778-6530
Nobleboro, ME	1,650	Full Revaluation	2025	Dennis Reed	(207) 563-8816
New Sharon, ME	1,275	Full Revaluation	2024	Paula Nason	(207) 778-4046
Starks, ME	725	Full Revaluation	2024	Erin Norton	(207) 696-8069
Gray, ME	4,995	Full Revaluation	2024	Nate Rudy	(207) 657-3339
Cape Elizabeth, ME	4,500	Full Revaluation (Finished in 2023, implementing in 2024)	2024	Clint Swett	(207) 799-1619
Camden, ME	3,230	Full Revaluation	2024	Kerry Leichtman	(207) 236-3353
Norwich, VT	1,580	Full Revaluation	2024	Cheryl Lindberg	(802) 649-1419
Putney, VT	1,100	Full Revaluation	2024	Geordie Heller	(802) 387-5862
Windsor, ME	1,620	Full Revaluation	2024	Theresa Haskell	(207) 445-2598
Lisbon, NH	1,300	Cyclical Revaluation (2022-2024)	2024	Krystle Dow	(603) 838-6376
Buckfield, ME	1,415	Full Revaluation	2024	Cameron Hinkley	(207) 336-2521
Haverhill, NH	3,800	Contract Assessor, Cyclical Revaluation (2023-2026)	Current	Brigitte Codling	(603) 787-6800
Lisbon, NH	1,300	Contract Assessor, Cyclical Revaluation (2022-2024)	Current	Krystle Dow	(603) 838-6376
Duxbury, MA	150	C&I Revaluation	Current	Steve Dunn	(781) 934-1100
Warren, NH	1,050	Cyclical Revaluation (2022-2026)	Current	Austin Albro	(603) 764-7705
Belmont, NH	4,300	Statistical Revaluation (Years 2022, 2023 and 2024)	Current	Alicia Jipson	(603) 267-8300
Littleton, NH	3,400	Contract Assessor	Current	Jim Gleason	(603) 444-3996
Landaff, NH	550	Contract Assessor, Cyclical Revaluation (2022-2026)	Current	Jennifer Locke	(603) 838-2308
Nantucket, MA	9,500	C&I Interim Revaluation, Commercial Data Collection	Current	Rob Ranney	(508) 228-7200
Dunstable, MA	225	Cyclical Data Collection	Current	Vicki Tidman	(978) 649-4514
Grantham, NH	2,500	Contract Assessor	Current	Melissa White	(603) 863-6021
Harpswell, ME	4,500	Valuation Consultant	Current	Debbie Turner	(207) 833-5771
Rindge, NH	2,800	Contract Assessor	Current	Lori Rautiola	(603) 899-5181
Strafford, NH	3,500	Contract Assessor	Current	Ellen White	(603) 664-2192
Bethlehem, NH	2,200	Contract Assessor	Current	Mary Moritz	(603) 869-3351
Belmont, NH	4,300	Contract Assessor	Current	Alicia Jipson	(603) 267-8300
Agawam, MA	398	Cyclical Data Collection	Current	Sam Konieczny	(413) 726-9704
Troy, NH	1,200	Contract Assessor	Current	Mary Guild	(603) 242-7722
Warren, NH	1,050	Contract Assessor	Current	Austin Albro	(603) 764-7705
Sullivan, ME	1,275	Full Revaluation	2023	Ray Weintraub	(207) 422-6282
Bethlehem, NH	2,200	Cyclical Revaluation (2021-2023)	2023	Mary Moritz	(603) 869-3351
Gorham, NH	1,700	Contract Assessor	2023	Michelle Lutz	(603) 466-3322
Kingston, NH	3,150	Contract Assessor/Cyclical Revaluation (2019-2023)	2023	Susan Ayer	(603) 642-3342
Biddeford, ME	800	Commercial Revaluation	2023	Nicholas Desjardins	(207) 284-9003
Troy, NH	1,200	Full Revaluation	2023	Mary Guild	(603) 242-7722
Oxford, ME	2,975	Full Revaluation	2023	Adam Garland	(207) 539-4431
Franklin, NH	3,750	Statistical Revaluation	2023	Judie Milner	(603) 934-3900
Winslow, ME	3,300	Cyclical Revaluation (2021-2023)	2023	Judy Mathiau	(207) 872-2776
Gorham, NH	1,700	Cyclical Revaluation (2019-2022)	2022	Michelle Lutz	(603) 466-3322
Grantham, NH	2,500	Statistical Revaluation	2022	Melissa White	(603) 863-6021
Marlborough, MA	13,500	1,300 Building Permits and Cyclical Data Collection	2022	John Valade	(508) 460-3779
Amherst, NH	5,000	Contract Assessor/Cyclical Data Collection	2022	Gail Stout	(603) 673-6041
Camden, ME	3,150	Interim Revaluation	2022	Kerry Leichtman	(207) 236-3353
Rockport, ME	2,600	Interim Revaluation	2022	Kerry Leichtman	(207) 236-6758
Duxbury, MA	150	C&I Revaluation	2021	Steve Dunn	(781) 934-1100
Easton, MA	9,200	Building Permits, Cyclical Data Collection	2021	Robbie Alford	(508) 230-0520
Strafford, NH	3,500	Statistical Revaluation	2021	Ellen White	(603) 664-2192
Landaff, NH	550	Statistical Revaluation	2021	Jennifer Locke	(603) 838-2308
Warren, NH	1,050	Statistical Revaluation	2021	Austin Albro	(603) 764-7705
Milford, NH	6,250	Statistical Revaluation	2021	Marti Noel	(603) 249-0615
Newburyport, MA	400	Data Collection	2021	Dave Glynn	(978) 465-4403
Hudson, NH	2,500	Data Collection	2021	Jim Michaud	(603) 434-7530



## Town of Rockport, Maine

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### Assessing Department

101 Main Street  
Rockport, Maine 04856  
Telephone: 207.236.6758 ext5  
Fax: 207.230.0112

### Kerry Leichtman, Assessor

kleichtman@rockportmaine.gov  
Caitlin Thompson, Assistant Assessor  
cthompson@rockportmaine.gov  
Molli Bennett, Admin Assistant  
mbennett@rockportmaine.gov

May 16, 2022

### To Whom This May Concern:

I first became aware of KRT Appraisal in 2014 as we were preparing to conduct a town-wide revaluation, our first in Rockport since 2005. KRT began the work in early 2015. Because of a restriction I placed on their work, I can offer you commentary based on a great deal of first-hand observation. That restriction was that I wanted to work with KRT. I didn't want them to come to Rockport, do the reval, then hand me a book of results and leave. I wanted to participate so that when they did leave I would be able to explain and defend the reval.

I visited properties with KRT, made decisions regarding neighborhood delininations, construction grades and depreciation conditions, and attended hearings.

Rockport was still stuck in the recession in 2015. People were nervous about the reval. KRT and I did a lot of PR, explaining the process and calming people down wherever possible. Once the reval was finished we held hearings. I sat in on at least half of them. Some taxpayers expressed a lack of confidence in the company "from away" and requested that I attend their hearing. The company from away did fine. They exhibited compassion at people's angst but did not compromise their professionalism. They did not change values because of a compelling story, but they did make the story tellers understand they were listened to. And they readily changed values when new, useful information came to light.

There were, of course, a few people who could not/would not be satisfied, but those people aren't satisfied with me either – they simply don't want to pay taxes. Every municipality has a handful of them. KRT showed the same patience and professionalism with them as they did with the more routine situations.

I was so pleased with KRT's work that I hired them again in Camden (the two towns have an agreement whereby my assistant assessor and I assess both towns). This time KRT was not the lowest bidder but we chose them anyway, because my experience in Rockport was so positive.

In Rockport, we only visited properties that had sold during the previous two years. We changed the parameters in Camden so that we visited every property. Again, I worked with KRT as much as my time would allow. We visited properties, made valuation decisions together, and conducted hearings. The results were the same. At the reval's conclusion, all of my ratios fell between 94 and 99% and my quality ratings were under 10. The work was completed on time. Almost all of my taxpayers were fine with the results. Again, those who weren't weren't going to be happy with anything.

Despite my hands-on involvement I called KRT many times after the revals to get particulars on how a property was valued. It always amazed me at how well they remembered details about a site visit or a conversation they'd had with a taxpayer.

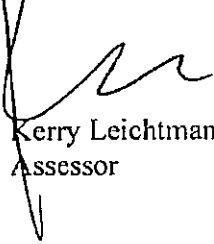
Long after the revals, I would still, on occasion, call KRT with questions when stumped on an assessing issue or about using Vision software because I'm so impressed with how well KRT knows assessing and how much experience they've had in so many different valuation situations. I have a tremendous amount of respect for their capabilities, and appreciation for their willingness to be involved beyond the contract.

Now in 2022, real estate values have dramatically increased in Camden and Rockport. My ratios, which were declining gracefully by a few points each year, crashed through the floor hitting unimagined lows. Camden last year was 91%. This year 75%. Rockport went from 90% to 79%. I did not hesitate to retain KRT to help me get values back on track. Together, we studied my local market and made appropriate adjustments. Then held hearings and made further adjustments as necessary.

I have recommended and continue to recommend KRT to my colleagues here in Maine, without hesitation.

If you have any follow-up questions I'd be pleased to address them.

Sincerely,



Kerry Leichtman, CMA  
Assessor



Assessor's Office • 1 Union Square • Milford, NH 03055  
Phone 603.249-0615 • Fax 603.673.2273  
[www.milford.nh.gov](http://www.milford.nh.gov)

May 16, 2022

To Whom It May Concern,

I have been the Chief Assessor in Milford NH since September of 2008. In that capacity I have had several opportunities to work closely with KRT Appraisal (KRT), where KRT has completed several statistical revaluations including 2011, 2016, and 2021 as well as two partial revaluation in 2013 and 2019. Each time Milford has prepared to conduct revaluation work, KRT rose to the top during the competitive bidding process and were ultimately hired by the town to complete the work. In every instance, I have found Rob Tozier and Ken Rodgers and their staff competent, reliable, knowledgeable and always accessible to address questions and concerns that have arisen. Each contract was completed in a timely manner; the follow-up for hearings was respectful and efficient, and concerns were addressed quickly and fully.

It's a given that revaluations can be anxiety producing for tax payers. The KRT team, from data collectors to President, treated every taxpayer with respect and patience, remained positive and helpful in their attitude throughout the process, and provided follow-up support whenever asked. The nature of assessments today, with the busy schedules of taxpayers, makes it impossible to enter every home, but when interior estimates were required or requested, they were done with reasonableness and care. While every revaluation will have some abatement requests where individual assessments are further fine-tuned on the granular level, I can attest that these were minimal and usually reasonable resolved.

I appreciate the opportunity to describe my experiences with KRT appraisal and would highly recommend their services.

Sincerely,

Marti Noel, Assessor CNHA  
Milford, NH 03055  
[mnoel@milford.nh.gov](mailto:mnoel@milford.nh.gov)



# THE CITY OF NASHUA

"The Gate City"

*Financial Services Division  
Office of the Chief Financial Officer*

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December 17, 2019

To Whom It May Concern:

The City of Nashua contracted with KRT Appraisal for a full statistical revaluation during 2018. I served as the contracting officer for this project. I found both Ken Rodgers and Rob Tozier very knowledgeable, professional, responsive and reliable. We had a very tight deadline to complete the project and KRT met each and every deliverable. The City of Nashua has over 29,000 parcels which made the revaluation quite challenging.

Of significant note was KRT's involvement in the informal hearings that were held in each of the City's nine wards. We had not held such informal hearings in several years and as the City's valuation rose from \$8 billion to \$10 billion with this revaluation, it was extremely important that residents and businesses had a venue to be heard prior to the publication of the final values.

Ken and Rob were always accessible during the entire project, which was much appreciated by the City's administrative team.

I would highly recommend KRT Appraisal without hesitation.

Sincerely,

A handwritten signature in black ink, appearing to read "John L. Griffin".

John L. Griffin

Chief Financial Officer

# ROBERT A. TOZIER

## MASS APPRAISAL EXPERIENCE

### **KRT APPRAISAL, HAVERHILL, MA**

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

Present Responsible in part for all aspects of daily operations including proposals, contracts, budgeting, marketing, customer acquisition, and company growth. Responsible for planning, implementing and running revaluation projects for municipalities. Duties include the mass appraisal of residential, commercial, industrial, and exempt properties. Specific duties include property sales review and verification, statistical analysis, model calibration, the supervision of data collectors and field review appraisers, taxpayer hearings, defense of values, and generation of USPAP compliant revaluation manuals.

### **VISION APPRAISAL TECHNOLOGY, NORTHBOROUGH, MA**

10/2006- **Project Manager**

04/2010 Responsible for planning, implementing and running revaluation projects for municipalities. Duties include the mass appraisal of residential, commercial, industrial, and exempt properties. Specific duties include property sales review and verification, statistical analysis, model calibration, the supervision of data collectors and field review appraisers, taxpayer hearings, defense of values, and all reporting requirements as they relate to project certification.

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

09/2006 Review residential and commercial properties for revaluation purposes. Responsibilities include delineating neighborhoods and setting factors for land based on market data, review and analyze income and expense reports for commercial and industrial properties, market research and formulation of cap rates, commercial and industrial review and reconciliation.

### **COLE LAYER TRUMBLE, TOLLAND, CT**

12/2000- **Appraiser Trainee**

05/2003 Worked on Revaluations in over twenty cities and towns across New England and Nation-wide. Duties included residential and commercial listing, quality control, permit pick-ups, sales verification, pre-review, final review, informal hearings, and training/supervising data collectors in the field.

## EDUCATION

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

B.S. Health & Fitness

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



Physical Therapy Undergraduate Coursework

## **APPRAISAL EDUCATION/CERTIFICATIONS**

### **IAAO/Appraisal Institute**

- 1) Fundamentals of Real Estate Appraisal (2002)
- 2) NH State Statutes Part 1 (2010)
- 3) NH State Statutes Part 2 (2010)
- 4) Mathematics for Assessors (2012)
- 5) Site Analysis (2012)
- 6) Assessment Administration (2013)
- 7) NH State Statute One Day Update (2016)
- 8) Understanding Real Property Appraisal (2017)
- 9) Intro to the Sales Comparison Approach (2018)
- 10) Workshop 171-Standards of Professional Practice and Ethics (2018)
- 11) Workshop 155-Depreciation Analysis (2018)
- 12) Forum 960-Marshall & Swift Residential Square Foot Method (2019)
- 13) Forum 962-Marshall & Swift Commercial Square Foot Method (2019)
- 14) NH State Statute One Day Update (2020)
- 15) USPAP 7 Hour Update (2021)
- 16) Workshop 171-Standards of Professional Practice and Ethics (2021)

### **JMB Real Estate Academy, Lowell, MA**

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

### **Massachusetts Association of Assessing Officers**

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

### **Maine Association of Assessing Officers**

- 1) Low-End Residential Properties (2021)
- 2) Valuation of Mobile Home Parks (2021)

**State Of New Hampshire Department of Revenue Administration: Certified Property Supervisor.**

**Certified Maine Assessor (CMA) No. 764**

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

# KENNETH J. RODGERS

## MASS APPRAISAL EXPERIENCE

### **KRT Appraisal, Haverhill, MA**

04/10- Present

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

### **Vision Appraisal Technology, Northborough, MA**

01/07-04/10

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

1/01- 12/06

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

### **Assessing Department, Town of Auburn, MA**

04/96- 01/01

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

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

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

### **Assessing Department, Town of Northborough, MA**

07/98- 06/01

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

## PROFESSIONAL DESIGNATIONS AND CERTIFICATIONS:

Massachusetts Accredited Assessor (MAA) inactive

Certified Maine Assessor-(CMA)

Certified Assessor Supervisor, Department of Revenue Administration, New Hampshire

Certified Project Supervisor, Department of Taxes, State of Vermont

**EDUCATION, MILITARY AND APPRAISAL COURSES:**

United States Marine Corps, Honorable Discharge  
Haverhill High School, Haverhill MA

**International Association of Assessing Officers/McKissock:**

Commercial Land Valuation  
Appraisal of Industrial and Flex Buildings  
Appraisal of Owner-Occupied Commercial Properties  
2020-2021 USPAP Update  
Appraisal of Fast Food Facilities  
The Basics of Expert Witness for Commercial Appraisers  
Expert Witness Testimony for Appraisers  
Appraisal of Assisted Living Facilities  
Marshall & Swift Residential  
Marshall & Swift Commercial  
Depreciation Analysis Workshop  
Appraising Single Tenant Distribution Centers  
Appraising Self-Storage Facilities  
Tax Policy  
Principles and Techniques of Cadastral Mapping  
Mass Appraisal of Residential Properties  
Assessment Administration  
Income Approach to Value  
Fundamentals of Mass Appraisal  
Fundamentals of Real Property Appraisal  
Fundamentals of Assessment Ratio Studies  
Site Analysis  
Understanding Real Property Appraisal

**Massachusetts Association of Assessing Officers:**

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

**Other Related Courses and Seminars:**

New Hampshire Statutes Update Course  
New Hampshire Statutes Course 1 and 2  
Multiple Regression Analysis, SPSS  
Intro to Statistics, SPSS  
Data Management, SPSS  
Exterior Construction Components, MBREA  
Project Management, AMA  
Geographical Information Systems, IAAO  
Appraising 1-4 Family Properties; J.M.B. Real Estate Academy  
USPAP, J.M.B. Real Estate Academy (15 Hour)  
Course 1A; Massachusetts Board of Real Estate Appraisers

**Expert Witness**

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

## KEVIN T. LEEN

### MASS APPRAISAL EXPERIENCE

#### KRT APPRAISAL, HAVERHILL, MA

04/2018- Senior Appraiser/Project Manager

Present Responsible for budgeting, planning, implementing, & running revaluation projects for various municipalities. Specific duties include the mass appraisal of residential & commercial properties. Duties include property sales review & verification via applicable state forms & recorded legal instruments, statistical analysis, analyze & interpret financial statements, model calibration, the supervision of data collectors & field review appraisers, taxpayer hearings, assist assessing clients with CAMA systems, all reporting requirements relating to project certification & USPAP-compliant mass assessment manuals, & jurisdictional ad valorem defense of value.

#### VISION GOVERNMENT SOLUTIONS, NORTHBOROUGH, MA

08/2004- Senior Appraiser/Project Manager

04/2018 Responsible for budgeting, planning, implementing, & running revaluation projects for various municipalities. Specific duties include the mass appraisal of residential and commercial properties. Duties include property sales review & sales verification via applicable state forms & recorded legal instruments, statistical market analysis, model calibration, analyze & interpret financial statements, GIS parcel mapping valuation, the supervision of data collectors & field review appraisers, taxpayer hearings, assist municipal assessing clients with CAMA systems & public relations, all reporting requirements relating to project certification & USPAP-compliant mass assessment manuals, & jurisdictional ad valorem defense of value.

09/2001- Senior Appraiser

08/2004 Review residential & commercial properties for revaluation purposes. Responsibilities include sales & non-sales review, sales verification via applicable state forms & recorded legal instruments, statistical market analysis, set neighborhood factors for land based on sales analysis, establish land & building methodology, building cost pricing & analysis, analyze & interpret financial statements, GIS parcel mapping valuation, coordinate field review operations, taxpayer hearings & assist in client consultations. Assist in reporting requirements in relation to project certification & USPAP-compliant assessment manuals, & jurisdictional ad valorem defense of value.

04/1999- Staff Appraiser

09/2001 Review residential properties for revaluation purposes. Responsible for overseeing sales data collection, sales verification via applicable state forms & recorded legal instruments, total data collection efforts & completing complex data collection assignments which may be beyond the scope of normal data collection personnel, quality control of data, & hearings with taxpayers. Maintaining a high level of

operating competence & efficiency and monitoring & evaluation of the data collection personnel.

### **PROFESSIONAL APPRAISAL EXPERIENCE**

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

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

### **EDUCATION**

**Boston College, Chestnut Hill, MA**  
Bachelor of Arts

### **APPRAISAL EDUCATION**

101 Introduction to Appraising Real Property  
102 Applied Residential Property Valuation  
410 Standards of Professional Appraisal Practice, Part A  
420 Standards of Professional Appraisal Practice, Part B  
The Expert Witness/ Introduction to Review Appraisal  
Residential & Commercial Building Components  
Valuing Apartment Buildings/ Factory Built Housing  
Supporting Sales Comparison Grid Adjustments for Residential Properties  
IAAO Course 300: Fundamentals of Mass Appraisal  
MAAO Course 3: The Income Approach to Value  
Residential Report Writing Case Studies/Excel for Assessors  
Issues Pertaining to Shoreland Properties-Maine  
IAAO Course 400: Assessment Administration  
Maine IAAO: Valuing Large Scale Solar  
IAAO Course 171: Standards of Professional Practice & Ethics  
Maine Revenue Service: Low-End Residential Properties  
Maine Revenue Service: Valuation of Mobile Home Parks  
McKissock Learning: Land & Site Valuation  
NHAAO/State of New Hampshire DRA State Statues Part I (2010) & Part II (2010)  
NHAAO/State of New Hampshire DRA State Statues Update (2018)  
National USPAP Update Course (1999), (2003), (2007), (2012), (2014), (2016), (2018)

### **CERTIFICATIONS/SPECIAL QUALIFICATIONS**

**State of New Hampshire:** Certified Residential Appraiser, NHCR385 (Inactive)  
**State of New Hampshire Department of Revenue Administration:**  
Certified Real Estate Appraiser Supervisor #214  
**New Hampshire Board of Tax & Land Appeals:** Qualified as Expert Appraisal  
Witness  
**Rockingham (NH) County Probate Court:** Admitted as Expert Appraisal Witness

**Windham (VT) County District Court:** Admitted as Expert Appraisal Witness  
**State of Maine:** Certified Maine Assessor (#740)  
**State of Vermont:** Project Supervisor



# DOUGLAS ROLLINS

## MASS APPRAISAL EXPERIENCE

### **KRT APPRAISAL, HAVERHILL, MA**

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

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

## WORK EXPERIENCE

### **ASSET MANAGEMENT SPECIALISTS, PORTSMOUTH, NH**

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

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

### **LIBERTY REALTY GROUP, LYNFIELD, MA**

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

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

### **STAPLES, BEVERLY, MA**

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

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

## EDUCATION

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

Diploma

## **APPRAISAL EDUCATION**

### **JMB Real Estate Academy**

Basic Appraisal Principles (2016)

### **IAAO**

Income Approach to Valuation (2022)

Fundamentals of Assessment Ratio Studies (2022)

Fundamentals of Mass Appraisal (2022)

### **NH Department of Revenue Administration**

NH State Statutes Part I (2022)

### **KRT Appraisal, Haverhill, MA**

80 Hour In-house Training Program (2014)

**NH Certified Assessor (Expires 2026)**

# GERARD LORTIE

## MASS APPRAISAL EXPERIENCE

### **KRT Appraisal, Haverhill, MA**

May 2016 - Present

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

## WORK EXPERIENCE

### **Home Inspection Directory Corp., Melvin Village, NH**

1999 – Present

**President/Owner** – Owner of an internet based business that helps consumers find home inspectors and related real estate services nationwide. Plan and execute day-to-day operations that include website maintenance, internet hosting, database entry, sales, marketing, customer service, payroll, taxes, accounts payable, accounts receivable, etc.

### **United Parcel Service, Inc, Laconia, NH**

2014 – 2015

**Package Handler** – Worked in a fast-paced team environment lifting, moving, sorting and handling packages. Loaded and unloaded packages from trucks to be delivered.

## EDUCATION AND AWARDS

Wentworth Institute of Technology, Boston, MA

- Architectural Engineering & Building Technology Undergrad Coursework

## APPRAISAL COURSES

### **JMB Real Estate Academy**

Basic Appraisal Principles, 2016

### **KRT Appraisal, Haverhill, MA (2016)**

80 Hour In-house Training Program

# DAN BOURKAS

## MASS APPRAISAL EXPERIENCE

### **KRT Appraisal, Haverhill, MA**

January 2023 - Present

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

## WORK EXPERIENCE

### **Treeworks, Rockport, ME**

2021 – 2023

**Business Office Manager** – Interact with customers daily on incoming calls. Set schedules for estimates completion. Coordinate and set schedule for work completion. Work in QuickBooks to process payroll, estimates, invoices and payments. Complete field estimates as needed.

### **J&H Property Management, Damariscotta, ME**

2017 – 2021

**Property Manager** – Manage client properties. Complete house and storm checks as required. Complete maintenance projects as requested by clients.

### **AthenaHealth, Belfast, ME**

2012 – 2017

**Claims Resolution Analyst** – Identify payer trends and provide solutions to support department goals and track completion. Resolve claim denials across all payers and work with others sharing information to strengthen the overall team. Mentor new team members as needed.

## EDUCATION/MILITARY

Mt. Pleasant High School, Mt. Pleasant, SC

United States Navy, E5, Honorable Discharge

## APPRAISAL COURSES

**KRT Appraisal, Haverhill, MA (2023)**  
80 Hour In-House Training Program



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# **Request for Proposals**

# **Property Revaluation Project**

Gardiner Assessing Department | 6 Church Street | Gardiner, ME 04345  
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## **PROJECT SUMMARY**

The City of Gardiner seeks competitive proposals for a complete revaluation of all taxable and tax-exempt real and personal property within the City of Gardiner, Maine (City) effective **no later than** April 1, 2027 (The effective date). The expected tax commitment date, using these values, is mid-August immediately following the effective date.

The real and personal property components of the project may be considered separate, unbundled projects. Prospective bidders may offer proposals on either one or both components. However, The City may consider the merits of selecting a single company for both components or awarding the projects separately.

## **BACKGROUND**

Gardiner, located in southern Kennebec County, is nestled among the string of communities lining the Kennebec River. Gardiner is also conveniently located at the confluence of two major highways, Interstates 95 and 295, allowing for quick transit to the Lewiston/Auburn, Brunswick/Mid Coast area, Greater Portland and the State Capital of Augusta.

Gardiner is a nationally accredited Main Street America community. Popular with tourists, Gardiner is an authentic New England community with a vibrant downtown known for its historic cultural architecture. Offering history, convenience, arts, and entertainment as well as a variety of unique shopping and outdoor activities for visitors and residents alike. The city boasts ever expanding recreational trails, a beautiful waterfront park and boating facilities on the tidal Kennebec River. A small City, Gardiner spans 16.57 square miles. According to the 2020 U.S decennial Census, the City's population is 5,900.

Governmentally, Gardiner's legislative body and municipal officers consist of an elected Mayor and 7 councilors. Gardiner has a City Manager who serves as the administrative head of the City. Regarding property assessments, the City has a single City Assessor, appointed by the City Manager, with advice and consent of the City Council.

The last full revaluation was in 2008. With updates performed in 2010 and 2013.

The City uses Vision (VGSI) CAMA system Version 8 for both real and personal property, which is hosted and maintained via VGSI's Cloud services. This system is utilized for the valuation of both real and personal estates. CAI's Axis GIS serves as the web host of Gardiner's assessment data online.

There are approximately 2,711 total real estate accounts. Included in which are approximately 2004 residential properties, 260 commercial and industrial properties, 70 four+ Unit apartment properties, and 147 tax exempt properties. The commercial properties consist of a downtown village area, a widespread mixed commercial district along US route 201, and larger scale manufacturing/distribution facilities located in and around the City's business park. Gardiner currently has three solar farm facilities sited and one small hydroelectric dam which produces approximately 5,430 MWh annually. There are approximately 215 business personal property accounts with BETE accounts averaging approximately 50 per year.

The City's preliminary 2024 equalized State Valuation is \$586,550,000.



## BID PROPOSAL DOCUMENT

This document is to be included in the bid package, clearly marked “**PROPOSAL – PROPERTY REVALUATION PROJECT**”.

Service	Total Price
1. Revaluation of all real property	\$ _____
2. Revaluation of all personal property	\$ _____
3. Digital imaging services (If not included in #1 above)	\$ _____
4. Web services during the revaluation public disclosure period (if not included in #1 above)	\$ _____
5. Defense of values post commitment	\$ _____
6. Any other services available	\$ _____

The above prices are to be considered separate, unbundled amounts. The City of Gardiner reserves the right to select or reject any or all prices, which ever arrangement it believes best serves its interests. The revaluation of real and personal property is to include data, loaded and operational in the City’s licensed Vision CAMA software.

## **PROJECT SCOPE**

The scope of the project (Revaluation Project or Project) requires the complete appraisal and revaluation of all taxable real property, all tax-exempt real property, all taxable personal property and all tax exempted personal property located within the corporate limits of the City of Gardiner, Maine as of the effective date of the project.

The Company shall furnish all labor, materials, supplies, and equipment, and shall perform all work for the Project in strict accordance with the specifications outlined in this RFP.

The values to be determined shall be "just value" as defined in Maine Statutes and Maine Supreme Court decisions. The basis of valuation shall be the recognized methods of appraising real and personal property. It is anticipated that property will be valued at 100% of full market value, however a final determination of the ratio assigned will be determined by the City Assessor, dependent upon market conditions at the time of the effective date of the project.

## **SUBMISSION REQUIREMENTS**

All proposals shall include:

1. **Cover Letter:** A brief introductory letter.
2. **Company Personnel:** Provide relevant information regarding your project team including:
  - a) **Overview of the Firm:** Number of years engaged as a Company, corporation, partnership, or individual specializing in governmental tax revaluation services.
  - b) **Experience:** List of all municipal revaluations completed during the past five (5) years, including client contact, and telephone number, A list of Equalization Contracts for which the Company is currently committed.
  - c) **Project Team Member(s):** Name(s) of project team members, including the supervisor to be assigned to this project, along with project team member resumes/qualifications.
  - d) **Contact Details:** Name and telephone number of person(s) to be contacted for further information and clarification.
3. **Understanding:** Provide a (brief) summary of your understanding of the project.

4. **Approach:** Describe your recommended approach to complete the tasks outlined in the scope of services (above) including:
- a) Specifics of Company's revaluation plan for the City.
  - b) Description of the Company's public relations program that would be used during the Project such as scheduling, staffing, and conducting informal hearings.
  - c) Description of total cost and quality controls including:
    - i. Total cost of Real Property Revaluation
    - ii. Total cost of Personal Property Revaluation
    - iii. Effective date of proposed Project, with rationale for proposed effective date
    - iv. Time schedule filled out according to the Revaluation Schedule
    - v. Staged fee payments filled out according to the Revaluation Schedule
    - vi. Detailed Cost of appeals to State Board and Court
5. **References:** Names, addresses (including e-mail), and telephone numbers of representatives of current or recent clients familiar with the services your firm and project team (three suggested).
6. **Additional Information:** Any other supplementary information that in the opinion of the Company may assist the City in evaluating the Proposal.

## PROPOSAL DEADLINE AND BID OPENING

Sealed Proposal shall be clearly marked "**PROPOSAL-PROPERTY REVALUATION PROJECT**" and addressed to **City Assessor, City of Gardiner, 6 Church St, Gardiner, ME 04345** and shall be supplemented by an electronic copy sent to [clebel@gardinermaine.com](mailto:clebel@gardinermaine.com).

### Anticipated RFP Timeframe:

Proposal Deadline	Tuesday, December 12, 2023 4 PM EST
Proposal/Bid Opening	Wednesday, December 13, 2023
Proposal Evaluations/Selection of Company	Wednesday, January 24, 2024
Execution of Contract by Company	Wednesday, March 27, 2024
Performance Bond <sup>1</sup> /Guarantee	Agreed upon terms to be incorporated into contract

Proposals received prior to the time of opening will remain sealed. All Proposals shall be delivered by **4:00 P.M. on December 12, 2023**. Proposals shall be opened publicly at 1:00 pm on Wednesday, December 13, 2023.

## FINAL SELECTION EVALUATION CRITERIA

The City Assessor and City project staff will evaluate each proposal based upon the documentation requested herein using criteria which include but are not necessarily limited to or in the order of the following:

### 1. Organization, qualifications, and experience: 35%

- i. Describe the Proposer's experience providing services like those requested for this project. Identify at least 5 projects on which your company has performed work comparable to that required in this RFP in the last 5 years. Include company name, contact name, address, and phone number, as well as a description of the project, dates of the project and results.
- ii. Identify the **key** staff who will be assigned to fulfill the contract requirements. Provide resumes describing their educational and/or work experiences.

### 2. Project/Proposal Approach: 30%

- i. Describe how the proposed revaluation plan addresses the project scope.
- ii. Describe how the public relations plan addressed the project scope.
- iii. Describe how the proposal addresses any additional considerations outlined in the project scope.

### 3. Anticipated Schedule: 10%

- i. Stated Effective date of the project.
- ii. Anticipated Start date of property data collection (not more than 18 month prior to effective date of the project)
- iii. Provide a schedule of deliverables and any other relevant milestones.
- iv. Describe how the firm will manage its overall workload to meet deadlines for the deliverables and other relevant milestones listed above.

### 4. Fee Statement: 25%

- i. Proposed cost of services
- ii. Describe how the firm will control and monitor its costs

5. **Proposer's References:** Provide at least 3 work references with contact information and descriptions of resulting projects, with dates. The results of reference checks will be used in scoring proposals.

The City reserves the right to reject any, or any part of, or all Proposals; to waive informalities and technicalities and to accept that Proposal which the City deems to be in the best interest of the City whether it is the lowest dollar Proposal or not. **On or before January 31, 2024**, the City will notify the selected Company that it has been selected.

## **GENERAL CONTRACT CONDITIONS**

On or before **April 1, 2024**, the selected Company shall execute with the City a Contract based on the General Contract Conditions the following contract conditions, as outlined below, shall be included in greater detail in the contract between the Company and the City.

- Changes in the contract
- Subletting to specialists
- Performance surety bond
- Indemnification
- Insurance
- Severability, Waiver, Cancellation and Misrepresentation Clauses

**Periodic Payments:** The City will pay the Company amounts as billed less a retainage agreed upon through conclusion of the local appeal process.

### **Surety:**

1. The company shall provide a guarantee or other surety acceptable to the City of Gardiner to ensure the faithful fulfillment of all terms and conditions of the contract.
2. If Sub-Companies are used payment surety or guarantee must be submitted in a form as approved and accepted by the City of Gardiner.

### **Indemnification and Insurance:**

1. The Company agrees to defend and indemnify the City against claims for bodily injury, accidental death, and property damage, which may arise during the Company's performance of the contract, and, in all other respects, to hold the City harmless from both inadvertent and negligent acts of the Company, its employees, and agents.
2. The Company shall not be responsible for consequential or compensatory damages arising from the late performance or non-performance of the contract caused by special or unusual circumstances beyond its reasonable control, such as acts of God or force majeure.
3. The Company shall maintain public liability insurance, automobile liability insurance and workmen's compensation insurance, with appropriate endorsements to the City, as its interests may appear. The municipality and its officers, employees, and agents, other than those agents working for the Company must be named as additional insureds.
4. The public liability insurance shall be in the form of a standard commercial general liability policy with the inclusion of contractual liability coverage and shall provide coverage against claims for personal injury, death, or property damage with limits of at least:

- a) \$400,000, each person
  - b) \$400,000, each occurrence, for bodily injury liability, and
  - c) \$400,000, each occurrence, for property damage liability.
5. The automobile liability insurances shall be in the form of a standard comprehensive automobile liability policy.
  6. The Company shall not deny liability because of any legal defense to which the municipality is entitled by reason of being a municipality.
  7. The Company shall carry valuable papers insurance on any and all records applicable to the project against the loss or destruction of such records in an amount of not less than the contract price.
  8. Liability limits shall not be less than the limits established in the Maine Tort Claims Act, 14 M.R.S.A §8101-8166, as they may be amended from time to time.
  9. The Company shall provide to the City:
    - a) Certificates of insurance, written by an insurer or insurers licensed to do business in the State of Maine, confirming the required insurance coverage is in effect on the date of execution of the Project Contract, and
    - b) An agreement by insurer(s) that a 10-day written notice of impending cancellation or material change in insurance coverage by insurer(s) will be provided to the City before cancellation or change should occur.

**Liquidated Damages/Penalties:** Failure of the Company to meet contracted deadlines for completion of work and approval by the City Assessor as having met the standards of these Specifications and the Contract, shall be cause for payment of liquidated damages by the Company, on demand by the municipal officers, according to the following proposed schedule, to be agreed upon by both parties:

- Deadline for delivery of preliminary values = \$600 per day
- Deadline for delivery of final values and all revaluation records, items and systems are delivered to the City Assessor in accordance with the General Contract Conditions = \$1,200 per day.

These deadlines may be amended by mutual agreement by both parties if determined to be necessary due to extended informal hearings, the City Assessors review of values or other circumstances outside of the control of the Company.

The Company shall not be liable for delays caused by reason of war, terrorism, strike, explosion, Acts of God, Orders of Court, or other public authority.



**City Contact:** Unless otherwise indicated in this RFP, all correspondence to be sent to the City shall be sent to the following address:

Curt Lebel, City Assessor  
City of Gardiner  
6 Church Street  
Gardiner, Maine 04345

**Additional Requirements:** The City reserves the right to specify additional requirements for inclusion in the final agreement with the Company.

## **REVALUATION SCHEDULE**

The Company shall start the equalization project as soon as practicable after signing the Contract, or upon a date as agreed to by the City Assessor. Thereafter the Company must continue in a diligent manner to ensure completion within the schedule of completion dates as set forth below.

**Scheduled Completion Dates:** The Company shall submit a schedule for the phases of the Project which sets forth the dates for completion and that schedule shall be incorporated into the Contract. Key Completion deadlines specified\*, which may result in liquidation damages shall be binding upon the Company. The phases of the Project are as follows:

1. Assignment of the Project Manager who shall be the Company representative on the project.
2. Public information and media releases
3. Complete residential data collection: measuring, listing and photos.
4. Complete commercial, industrial, public utility, special purpose, and tax-exempt data
5. collection-measuring, listing and photos
6. Complete land study and value analysis and development of Land Pricing Schedules
7. Complete building cost manual and development of Cost Schedules
8. Complete market data study to begin appraisals.
9. Complete study of market rents, expenses and capitalization factors to begin appraisals.
10. Valuing of land
11. Valuing of buildings
12. \*Deliver completed residential appraisals on property record cards with all measurements, sketches, listings, pricing, review and values, incorporating all building permits up to and including the effective date of the project, to the City Assessor.
13. \*Deliver completed commercial, industrial, public utility, and special purpose appraisals on property record cards with all measurements, sketches, listings, pricing, review and values including assessment computation to the City Assessor.
14. Assessment notices mailed.
15. Informal hearings begin.
16. Informal hearings completed.
17. Determination notices mailed
18. \*Computer file is updated for all final appraisals
19. Assist the City Assessor with formal appeals as necessary.
20. Assist the City Assessor with appeals to Board of Assessment Review and or Superior/Supreme court as necessary.

## **RESPONSIBILITIES OF REVALUATION COMPANY**

The Company's Project Manager and City Assessor shall regularly discuss the progress and various other details of the Project. These discussions may be scheduled to occur more frequently if they are found to be necessary by the city.

Property data, and/or appraisals and records shall not be made public until after the assessment notices are mailed.

**Equipment and Supplies:** The Company shall provide all equipment and supplies at the Company's expense except as otherwise provided herein.

**Deliverable Products:** All documents, records, data, and other materials procured or produced in the performance of the Project will become the sole property of the City. The documents, records, data, and other materials will include:

1. Documentation of procedures used throughout the Project.
2. All manuals used in any phase of the Project.
3. Data collection and valuation manuals for use in maintaining and updating values.
4. Detailed valuation manuals, including tables and formulas used in applying the cost, sales comparison and income approaches to property valuation; grade and housing type descriptions for each grade and housing type.
5. Source information used in the development of cost, sales comparison and income approach schedules.
6. A field card for all properties
7. Digital photos of all buildings
8. All manual and computerized reports supporting valuation formulas and values for vacant land and improved properties.
9. All sales ratio studies utilized in the Project.
10. Field review documents reflecting preliminary values, adjusted preliminary values, and any notes relative to informal review actions.
11. A report on all informal hearings. Each meeting with property owners shall be documented stating the property owners' issue(s) and the Company representatives' response(s). A final report showing the number of hearings, the number and amounts of values changed.
12. Valuation List of new values
13. All documents shall be delivered as digital files, unless otherwise specified by the City Assessor
14. The Company shall provide training for appropriate City personnel, adequate to provide them with the knowledge necessary to understand and use the appraisal system and/or other software installed by the Company, if necessary.

**Public Relations:** The parties to this Project recognize that a good public relations program is required. The Company shall support the City Assessor in conducting a public information program. All public information releases shall be approved by the City Assessor prior to release. The Company shall submit a detailed public relations plan to the City with its proposal. The program must include but is not limited to:

*Prior to Data Collection:*

1. Press releases
2. Meetings with local officials
3. Public meetings on the following topics:
  - a) Laws concerning revaluation market value
  - b) General outline of revaluation project
  - c) Data Collection
  - d) Valuation procedures
  - e) Review procedures
  - f) Informal hearings
  - g) Taxpayer formal appeal proceeding
  - h) Pre-data collection leaflet/notice to property owners

*During Data Collection and Valuation:*

1. Press releases
2. Meetings with local officials
3. Meeting with civic groups
4. Public Meetings

*After Data Collection and Valuation:*

1. Press releases
2. Meetings with local officials
3. Public meetings
4. Informal Hearings
5. Board of Assessment Review meetings

**Conduct of Company Employees:** As a condition of this Contract, the Company's employees shall treat residents and City employees with respect and courtesy. The Company shall take appropriate and meaningful disciplinary measures against those who violate the terms of this provision and shall immediately remove any employee from the project if requested to do so by the City Assessor.

**Inspections:** All physical improvements shall be inspected, measured, and listed, noting all interior and exterior construction details, quality of construction, age, and condition.

**Sketches:** Sketches of all significant buildings shall be drawn to scale with dimensions given on the property record card.

**Data Entry:** All data entry will be entered into the City's CAMA system by the Company.

**Field Work Quality Check:** At the end of each month the Company shall provide the City Assessor report of properties inspected until the completion of the public hearings. The City Assessor may conduct checks to ensure the quality of data collection. The Company shall notify the City Assessor monthly of the region of City field collection will take place in the following month so that the information can be posted on the City's website.

**Sales Analysis:** The Company shall analyze qualified sales for the two (2) year period immediately preceding the effective date of the project. These sales shall be reduced to appropriate units of comparison and segregated into the following major categories: vacant residential land, vacant commercial land, vacant industrial land, mobile homes, residential condominiums, commercial condominiums, residential properties, commercial properties, apartment properties and industrial properties. Further subcategory breakdown such as ranch, split level, cape, retail, office, gas station, etc. will also be required. No values shall be set until such an analysis is presented to, reviewed, and accepted by the City Assessor.

**Assessment Notices:** A notice shall be sent, at the Company's expense, by first class mail, to each owner of record as of the effective date of the project, setting forth the new valuation that has been placed upon the property identified in the notice. If possible, at the time of the notice, an estimated tax rate will be included. The notice shall be prepared in duplicate and conformity with the Maine Law and approved by the City Assessor prior to mailing. The duplicate copies will be delivered to the City Assessor in electronic form (i.e. pdf) and arranged in map/lot sequence.

Further, the notices shall include information specifying the dates, times, and place of the informal hearings. Such notices and information shall be subject to approval by the City. Prior to sending notices, the Company shall memorialize the proposed new values in the CAMA's Assessment History section as Interim values. The Company and City shall cooperatively update the City's Website to allow public access to the property interim property record cards.

**Informal Hearings:** The Company shall hold informal hearings, at such times and locations as the City may specify, so that owners of property, or legal representatives of owners, may discuss with qualified members of the Company's staff the assessed valuations of their property. The Company's personnel shall explain the manner and methods of arriving at value. Informal hearings, at the discretion of the City, may be held on weeknights and Saturdays as well as during business hours. Members of the City's Assessing Department staff may also be present at hearings.

The Company, in conjunction with recommendations of the City, shall schedule a sufficient number of hearings and provide sufficient qualified personnel certified by the State of Maine and approved by the City to handle said hearings expeditiously and fairly. **It is expected that a minimum of 3 weeks will be allocated to hearings, with the capacity to extend this timeframe, if deemed necessary by the City Assessor.**

Any information offered by the taxpayer shall be given consideration, and adjustments shall be made where warranted. The Company shall notify in writing each taxpayer who has appeared at an informal hearing of the results of that hearing whether the assessment has been changed or not. The content and form of such notices shall be subject to the prior approval of the City Assessor.

**Defense of Values:** For requests for abatements or appeals of assessments, the Company will follow the following procedures.

The Company agrees that the Project Manager or Field Appraiser of the Gardiner project shall be present or available at the request of the City Assessor for the period of time necessary to assist in considering abatement requests and to assist the City Assessor in explaining the basis of the revaluation to property owners.

The Company agrees that the Project Manager in charge of the Gardiner project should be present if requested at any hearing of local and/or state body of assessment appeals following completion of the project and to defend the values.

In the event of any appeal to the courts, the Project Manager in charge of the Gardiner project will be present at the hearing to testify as a witness, to outline the steps taken and give his opinion of value of the property which has been or is the subject of appeal.

The Company agrees to assume all costs for services rendered by it in connection with any and all hearings, reviews and/or court actions provided the filing of such hearing, review and/or court action is commenced within one (18) months of the revaluation effective date.

## **APPENDIX A - APPRAISAL SPECIFICATIONS**

**Appraisal of Land:** The Company shall appraise all types of land within the City.

**Land Inspection:** The Company shall be responsible for identifying and considering in its valuation of each land parcel the physical, legal, and economic factors which may affect its use and value.

**Land Value Study:** Vacant land sales occurring during the two-year period immediately preceding the effective date of the project shall be analyzed.

Improved property sales data shall be analyzed, at a minimum, for arms-length transactions occurring during the two (2) year period immediately preceding the effective date of the project, in order to estimate land values by the residual method.

The Company shall consider factors affecting land value, such as location, zoning, available utilities, size, shape, topography, view, improvements, special exceptions or zoning variances, nonconforming uses, flood plains, flood zones, and special purpose uses.

**Land Unit Value:** The City Assessor, in consultation with the Company, shall determine what type of land unit values and formulas shall be used for the various types of property and property locations. The front foot, square foot, acreage, fractional acreage and per lot units shall be considered, among other possibilities.

**Neighborhood Delineation:** The Company shall delineate neighborhood units within the City.

**Land Value Inspections:** The Company shall make a physical inspection of each plot of land from the public way and make necessary adjustments in value to compensate for topographical irregularities

such as high banks, steep slopes, swamps, irregular shape or any other factor which may detract from or enhance the value of the land.

## **RESIDENTIAL BUILDINGS AND STRUCTURES**

**Data Collection:** The Company shall view by physical inspection the exterior and interior of all real property in the City in compliance with Maine law.

The Company shall make a listing of physical construction details of all the structural improvements pertinent to residential property in the City on field cards for entry into the CAMA database. Details of all structural improvements are also to be listed on the field cards. Digital photos of each significant structure are to be taken at the first visit and entered into the CAMA database.

**Measurer/Lister Identified:** The field card and the property record card shall indicate the Lister and date(s) of the listing.

**Entrance Refused:** When entrance to a building for an inspection is refused, the Lister shall make note of the fact and within two (2) working days notify the City Assessor.

The Company shall not enter premises when only minor children are present. The Company shall make one (1) call back.

**Call Backs:** Where necessary it is expected that the Company shall make one (1) call back. The Lister making the call back shall note the time and date of call back on the field card and on the property record card.

**Notification Letter:** If after one (1) call back, contact was not established with a property owner, a notification letter (approved by the City) shall be mailed at the Company's expense, notifying the property owner that the representatives of the Company were not able to make contact, and request that within a prescribed time limit the property owner contact the Company to arrange an inspection.

**Preliminary City Acceptance:** Prior to the mailing of the assessment notices, the Company's Project Manager will review the valuations with the City Assessor, who shall approve the release of notices.

## **COMMERICAL, INDUSTRIAL, UTILITIES, EXEMPT & SPECIAL PURPOSE PROPERTIES**

All commercial, industrial, public utility, exempt, and special purpose buildings and improvements shall be inspected, classified, priced, and valued.

**Description:** All buildings shall be identified and described as component parts of construction, size, area, age, and usage.

**Income Approach:** Income and expense data shall be gathered by the Company on forms approved by the City Assessor, which shall become the property of the City. Proprietary information of property owners shall not become a public record.

The Company shall develop, with the involvement of the City Assessor, capitalization rates and gross rent multipliers through interviews with bankers, investors, realtors, appraisers, and other informed sources.

The Company shall determine market and economic rents, vacancy rates, operating expenses, capitalization rates, and/or gross rent multipliers applicable to the various classes of commercial, industrial, and special-purpose properties being valued. The Company shall document, in writing, its sources of information, and describe its use and analysis in estimating values.

The Company shall perform the income capitalization approach using generally accepted methods and techniques. Gross rent multipliers shall be used as an additional valuation check where applicable.

The Company shall mail income and expense questionnaires to all commercial and industrial property owners. Responses shall become the property of the City at the completion of the Project. Proprietary information shall not become a public record.

**Fixed Equipment:** All fixed machinery and equipment serving a building and taxable as real estate shall be listed within that building and valued in accordance with procedures as outlined in the applicable price schedule. If a question exists whether certain machinery or equipment is taxable as real estate, the Company shall bring that question to the attention of the City Assessor

The City Assessor shall be notified in writing of any item which might be considered personal property and is included in the valuation of the building. It shall be separately listed and described by the Company either on the property record card or separately on another record.

**Review:** The reviewer shall be competently trained, certified and fully experienced in the appraisal of the particular type and kind of commercial, industrial, public utility or special purpose building for which the reviewer is responsible.

## **PERSONAL PROPERTY**

The appraisal company shall provide a brief description of all personal property appraised. The company shall appraise and total separately each class or kind of personal property. The company shall conduct an examination of the property involved, sufficiently detailed to ascertain the reasonableness of the information provided. Where records or statements are of little assistance the company shall list and value major items of property individually. Minor or group items may be combined, listed, and valued in a total value for the group or kind. A major item is here considered as a unit, machine, or item of equipment for which the current value is \$2,000 or more.

The company shall load all valuation data into the City's Vision CAMA system.

The Company shall value and record in the city's CAMA system all BETE exempt equipment and exempt amounts and submit the qualifying applications to the City Assessor for approval.



All personal property shall be valued in accordance with accepted standards established by Maine Statute and the Bureau of Taxation. Where a question arises as to value and/or method(s) of valuation the City Assessor shall make the final determination.

**Preliminary City Acceptance:** Prior to the mailing of the assessment notices, the Company's Project Manager will review the final values, computed by the Company, with the City Assessor to ensure that the City is prepared to accept the Company's work. The City Assessor will make the final judgment on the final value.

## **APPENDIX B - RESPONSIBILITY OF CITY**

**Maps:** The City shall furnish one set of Tax Maps showing streets, property lines, and parcel identification numbers, along with PDF versions.

**Zoning:** The City will furnish one (1) set of the current City zoning regulations and a zoning map.

**CAMA Database & CAMA Software:** The City Assessor will make available to the Company the current CAMA database.

**Property Transfers:** The City shall notify the Company, on a regular basis, of property splits and transfers occurring after the initial establishment of the Company's database for this information. The Company shall update its records in accordance with this notification.

**Building Permits:** The City shall furnish the Company copies of all building permits issued during the course of the Project up to the effective date of the project.

**Introduction:** The City Assessor shall furnish letters of introduction and authority to inspect real estate in the City along with suitable identification badges.

**Mailing Address:** The City shall furnish through the Assessors Office the current mailing address of all property owners.

**Mail:** For any mail the Company is required to send in conjunction with this Project, it is the responsibility of the City to investigate all returned mail for updated name or address and to re-mail such mail.

**Office Space:** The City shall furnish the Company with sufficient office space, necessary office furniture and copier equipment to carry out the terms of this project.

**Assessing Personnel:** The City Assessor may, from time to time, accompany listers/appraisers on property visits.

## APPENDIX C – DEFINITIONS

**City Assessor:** shall mean the duly appointed Assessor of the City of Gardiner, Maine **CAMA:** shall mean Computer Assisted Mass Appraisal

**CMA:** shall mean Certified Maine Assessor

**Company or Company:** shall mean any person, firm, corporation, association, or other entity performing the revaluation work under contract.

**Contract:** shall mean the agreement between the Company and the City to provide services in accordance with this RFP

**Effective Date of the Project:** shall mean the statutory date of Assessment. April 1, 2025, or April 1, 2026 (whichever is specified in the Contract)

**Field Card:** shall mean the document used in the field to record information about the property when the property is listed and measured

**Project or Equalization Project:** shall mean the reappraisal and revaluation of all taxable real property and all tax-exempt real property within the corporate limits of the City of Gardiner

**Property Record Card:** shall mean the card generated from the CAMA system

**Proposal:** shall mean the Company or Company's proposal submitted in accordance with the RFP requirements

**RFP:** shall mean Requests for Proposals Specifications: shall mean the requirements of the RFP

**City:** shall mean the City of Gardiner, Maine

## RFP Exceptions/Clarifications

KRT has the following exceptions/clarifications to the RFP:

1. The RFP calls for the project supervisor to be available for 18 months to complete defense of value and assume all costs. This isn't the preferred approach for KRT as we would have to guess how many days would be needed. The fairest approach so neither party gets over-charged is to use an hourly rate. KRT is proposing to include five (5) days within the stated price, then charge the Town \$125.00/hour for time needed beyond the five days.
2. The RFP suggests that a performance bond be included to protect the Town and ensure that if selected for the project, that KRT will enter into a contract. As a small partnership, KRT has never utilized any type of bond, but instead offers a higher retainage in the amount of fifteen percent (15%) of the contract price for a total of thirty three thousand seven hundred fifty dollars (\$33,750). This money shall be held from each invoice and returned to KRT upon successful completion of the project (see proposal for release details).
3. The RFP uses the following schedule to calculate late penalties.

1 to 10 working days = \$300 per day

11-20 working days = \$600 per day

Over 20 working days = \$1,200 per day

KRT suggests using a blended rate of \$600/day for all days late.