



Town of Raymond
Select Board ePacket
September 12, 2023
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Agenda



SELECT BOARD Agenda

September 12, 2023

5:30pm – Regular Meeting

At Broadcast Studio &
Via Zoom & on YouTube

Resolution: We, the Raymond Select Board, recognize our individual and collective responsibilities as leaders and representatives of our community. To this end, we pledge to conduct ourselves in a manner befitting these roles and duties. We pledge and encourage others to "Be the Influence" and to recognize that decisions matter.

- 1) **Call to order**
- 2) **COLAB Broadband High Speed Access Presentation** – Andrew Davis, Sebago Fiber & Wifi LLC owner, and Clara McCool, Regional Broadband Coordinator
- 3) **Minutes of previous meetings**
 - a) August 15, 2023
 - b) September 5, 2023
- 4) **Old Business**
 - a) Consideration of Liquor License Application – East Shore Tavern – Kyle Bancroft, owner
 - b) Consideration of Special Amusement License Application – East Shore Tavern – Kyle Bancroft, owner
- 5) **New Business**
 - a) Consideration of Business License Application – Paul & Adelen Philippine Store – Paul Wells, owner
 - b) Consideration of Business License Application – Camp Masters – Santino Tarsetti, owner
 - c) Consideration of Awarding Revaluation Contract to KRT Appraisal – Curt Lebel, Contract Assessor
 - d) Consideration of Setting the FY 2023-2024 Mill Rate – Curt Lebel, Contract Assessor
 - e) Consideration of update of the POST ISSUANCE COMPLIANCE POLICY – Charisse Keach, Finance Director
 - f) Consideration of Annual Update to General Assistance Ordinance – Sue Look, Interim Town Manager

6) Public Comment

7) Selectman Comment

8) Town Manager's Report and Communications

a) Confirm Dates for Upcoming Regular Meetings

- October 10, 2023
- November 14, 2023

9) Executive Session

a) Discussion of Personnel Issue - pursuant to 1 MRSA §405 (6) (A)

10) Adjournment

COLAB Letter of Support



Select Board
401 Webbs Mills Road
Raymond, Maine 04071

207-655-4742

September 12, 2023

Maine Connectivity Authority
PO Box 817
125 Forest Ave.
Portland, ME 04104

Dear MCA,

The Town of Raymond fully supports Sebago Fiber's application to MCA's Connect the Ready Program to build out Fiber to the Home (FTTH) in the Town of Sebago.

Raymond has worked alongside Town of Sebago as part of the Cumberland Oxford Lakes Area Broadband (COLAB) Initiative since 2021. After an in-depth RFP process including multiple interviews with various Internet Service Providers, the COLAB Steering Committee agreed that Sebago Fiber was their recommended solution. A grant award to the Town of Sebago is a beneficial first step for the entire Sebago Lake region. With this build, the Town of Sebago can act as an anchor, bringing Raymond and other Sebago Lake towns closer to the three-ring binder providing open access fiber with expanded connectivity options.

Sebago Fiber and their Community Partner, the Town of Sebago receiving this grant will greatly assist the Town of Raymond, and other COLAB towns, in meeting the goals and objectives of our community-driven broadband project.

Sincerely,

Joseph Bruno, Chair

Rolf Olsen, Vice-Chair

Teresa Sadak

Samuel Gifford

Derek Ray

Previous Meeting Minutes - August 15, 2023



Resolution: We, the Raymond Select Board, recognize our individual and collective responsibilities as leaders and representatives of our community. To this end, we pledge to conduct ourselves in a manner befitting these roles and duties. We pledge and encourage others to "Be the Influence" and to recognize that decisions matter.

SELECT BOARD Minutes

August 15, 2023

5:30pm – Special Town Meeting

Directly Followed by the Regular Meeting

At Broadcast Studio &
Via Zoom & on YouTube

1) Special Town Meeting

Town of Raymond August 15, 2023 SPECIAL TOWN MEETING WARRANT

TO: Don McClellan, a resident of the Town of Raymond, in the County of Cumberland and State of Maine.

GREETINGS:

In the name of the State of Maine, you are hereby required to notify and warn the inhabitants of the Town of Raymond, qualified by law to vote in Town affairs, to meet at the Broadcast Studio at 423 Webbs Mills Road in said town on Tuesday, August 15, 2023, at 5:30 P.M., then and there to act on Articles 1 through 2 as set out below.

ARTICLE 1: To elect a moderator to preside at said meeting.

Nomination made and seconded for Joe Bruno. Call for nominations to cease.
Voted 3-0

Mr Bruno was sworn in by Town Clerk Look

ARTICLE 2: To see if the Town will authorize medical cannabis retail store locations operating with municipal approval as of December 13, 2018, to operate pursuant to a medical cannabis dispensary registration or a caregiver registration, in compliance with all applicable state and local requirements?

NOTE OF EXPLANATION: *This change in no way allows any sale of recreational use cannabis in the Town of Raymond. It does allow the 2 medical use sites currently grandfathered to operate in Raymond to register with the State of Maine as either a medical caregiver or a medical dispensary.*

The Maine State Statues (Title 22, Chapter 558-C: Maine Medical Use of Cannabis Act)

* Taken out of order

Select Board Meeting Minutes

(Page 1 of 5)

August 15, 2023

§2422. Definitions include the following:

1-F. Caregiver retail store. "Caregiver retail store" means a store that has attributes generally associated with retail stores, including, but not limited to, a fixed location, a sign, regular business hours, accessibility to the public and sales of goods or services directly to a consumer, and that is used by a registered caregiver to offer cannabis plants or harvested cannabis for sale to qualifying patients.

6. Registered dispensary or dispensary. "Registered dispensary" or "dispensary" means an entity registered under section 2425-A that acquires, possesses, cultivates, manufactures, delivers, transfers, transports, sells, supplies or dispenses cannabis plants or harvested cannabis or related supplies and educational materials to qualifying patients and the caregivers of those patients.

Motion to approve as presented by Mrs Sadak. Seconded by Mr Olsen.

Vote 9-0

2) Adjourn Special Town Meeting

Motion to adjourn at 5:35pm by Mrs Sadak. Seconded by Mr Olsen.

Unanimously approved

3) Called regular meeting to order at 5:37pm by Chair Bruno

4) Minutes of previous meetings

a) June 19, 2023 – Regular Meeting

Motion to approve as presented by Select Olsen. Seconded by Select Sadak.

Unanimously approved

b) June 27, 2023 – Special Meeting

Motion to approve as presented by Select Gifford. Seconded by Select Olsen.

Unanimously approved

c) July 18, 2023 - Special Meeting

Motion to approve as presented by Select Sadak. Seconded by Select Ray.

Unanimously approved

5) Public Hearing

* Taken out of order

Select Board Meeting Minutes

(Page 2 of 5)

August 15, 2023

- a) Special Amusement Application – East Shore Tavern (formerly Café Sebago), Kyle Bancroft, owner

Chair Bruno opened the public hearing.

Mr Bancroft was called out-of-state today and is unable to attend.

CEO Sirois discussed with the Select Board that the parking area in the back still has not been fixed. This area was created without permits, they were going to get after-the-fact permits and then said they would reseed, neither have happened as yet.

Mr Bancroft has gotten an extension from the State of Maine of another month.

Peter Leavitt recommended no action on this until the violation has been corrected.

Marilyn Wescott asked what a Special Amusement Permit is. CEO Sirois explained it was any entertainment.

Fire Inspector Jones said that the Special Amusement Permit is a component of the Liquor License and the fire inspection has not as yet been scheduled

Chair Bruno declared the public hearing closed.

6) New Business

- a) Consideration of Budget-Finance Committee Vacancy – Sue Look, Town Clerk

This seat is vacant due to no one running for the position. If the Budget-Finance Committee wants to have this position filled, they will put forward a candidate. This is a 7-member committee and will still require 4 members present for a quorum.

- b) Consideration of Planning Board Resignation – Sue Look, Town Clerk

Mr Mike D'Arcangelo is moving out of Raymond and sent in a resignation letter for the position he has held on the Planning Board. He is also a member of the Board of Assessment Review. There are currently no applicants for either position.

The Select Board would like the Town to advertise on the website, electronic sign, Facebook, and the Road Runner for these positions.

Motion to accept Mr D'Arcangelo's resignation by Select Olsen. Seconded by Select Ray.

Unanimously approved

Chair Bruno thanked Mr D'Arcangelo for his years of service and stated that we certainly appreciate all the volunteers in this town.

- c) * Consideration of East Shore Tavern (formerly Café Sebago) Liquor License – Kyle Bancroft, owner

Motion to table by Select Olsen. Seconded by Select Sadak.

Unanimously approved

- d) * Consideration of East Shore Tavern (formerly Café Sebago) Special Amusement Application – Kyle Bancroft, owner

* Taken out of order

Motion to table by Select Sadak. Seconded by Select Olsen.

Unanimously approved

- e) Consideration of Quit Claim Deed(s) – Sue Carr, Tax Collector

Danielle Emerson – Map 4 Lot 14 – Roosevelt Trl - \$4,088.47

Motion to approve as presented by Select Sadak. Seconded by Select Olsen.

Unanimously approved

7) Public Comment

Peter Leavitt spoke regarding the Comprehensive Plan Committee. The process is 1 year old now. The committee is satisfied with North Star Planning. Thank you to Sue Look, Don Willard and Chris Hanson who have been very helpful. All Town staff have been helpful. The committee is very diverse and committed to this process. The committee acts as facilitators for the citizens in the Town to formulate the report. A lot has changed since the last report in 2004. The department head interviews are wrapping up. The plan also has to fit the State requirements for Comprehensive Plans. Ultimately the Town will need to vote to adopt the plan or not. Please fill out the current survey online which will help the committee develop the required vision statement. Anyone, resident or not, can and should take the survey.

8) Selectman Comment

Congratulations to the Gray – New Gloucester – Raymond Little League Team! Great job getting that far!

9) Town Manager's Report and Communications

- a) **Confirm Dates for Upcoming Regular Meetings**

- September 12, 2023
- October 10, 2023

- b) **Upcoming Holiday Reminder**

- Monday, September 4, 2023 – Labor Day

10) Executive Session

- a) Discussion of Personnel Issue – pursuant to 1 MRSA §405 (6) (F)

Motion to enter executive session at 5:59pm by Select Sadak. Seconded by Select Olsen.

Unanimously approved

* Taken out of order

Motion to leave executive session at 6:52pm by Select Olsen. Seconded by Select Ray.

Unanimously approved

11) Adjournment

Motion to adjourn at 6:52pm by Select Olsen. Seconded by Select Sadak.

Unanimously approved

Respectfully submitted,

Susan L Look, Town Clerk

* Taken out of order

Previous Meeting Minutes - September 5, 2023



SELECT BOARD Minutes

September 5, 2023

5:30pm – Emergency Meeting

At Broadcast Studio &
Via Zoom & on YouTube

Resolution: We, the Raymond Select Board, recognize our individual and collective responsibilities as leaders and representatives of our community. To this end, we pledge to conduct ourselves in a manner befitting these roles and duties. We pledge and encourage others to "Be the Influence" and to recognize that decisions matter.

Select Board members in attendance: Joe Bruno, Rolf Olsen, Teresa Sadak, Samuel Gifford, Derek Ray

Town Staff in attendance:
Sue Look – Town Clerk

1) **Called meeting to order** at 5:30pm by Chair Bruno

2) **Executive Session**

a) Discussion of Personnel Issue – pursuant to 1 MRSA §405 (6) (A)

Motion to enter executive session as noted above at 5:30pm by Select Olsen.
Seconded by Select Gifford.

Unanimously approved

Motion to leave executive session at 6:27pm by Select Olsen. Seconded by Select Gifford.

Unanimously approved

Motion to approve transition agreement with Town Manager Don Willard by Select Olsen. Seconded by Select Sadak.

Unanimously approved

Chair Bruno made the following statement:

Town Manager Don Willard has been out on sick leave and will continue to be out on leave through early next year, at which time he has informed us that he will be retiring. We thank Don for his long service to the town and wish him well. Until such time, Sue Look will continue as interim Town Manager.

3) **Adjournment**

Motion to adjourn at 6:38pm by Select Olsen. Seconded by Select Sadak.

Unanimously approved

*Respectfully submitted,
Susan L Look, Interim Town Manager*

Liquor License Application - East Shore Tavern



STATE OF MAINE
DEPARTMENT OF ADMINISTRATIVE AND FINANCIAL SERVICES
BUREAU OF ALCOHOLIC BEVERAGES AND LOTTERY OPERATIONS
DIVISION OF LIQUOR LICENSING AND ENFORCEMENT

Application for an On-Premises License

All Questions Must Be Answered Completely. Please print legibly.

Division Use Only	
License No:	
Class:	By:
Deposit Date:	
Amt. Deposited:	
Payment Type:	
OK with SOS: Yes <input type="checkbox"/> No <input type="checkbox"/>	

Section I: Licensee/Applicant(s) Information; Type of License and Status

Legal Business Entity Applicant Name (corporation, LLC): BATALI HOLDINGS LLC	Business Name (D/B/A): EAST SHORE TAVERN
Individual or Sole Proprietor Applicant Name(s):	Physical Location: 1248 ROOSEVELT TRAIL RAYMOND, ME
Individual or Sole Proprietor Applicant Name(s):	Mailing address, if different: P.O. BOX 846 RAYMOND, ME 04071
Mailing address, if different from DBA address:	Email Address: KTSBANCROFT@HOTMAIL.COM
Telephone # Fax #: 207-807-0842	Business Telephone # Fax #: 207-655-6481
Federal Tax Identification Number: 85-1174601	Maine Seller Certificate # or Sales Tax #: 1207642
Retail Beverage Alcohol Dealers Permit:	Website address: N/A

1. New license or renewal of existing license? ☐ New Expected Start date: _____

☒ Renewal Expiration Date: **8/19/21**

2. The dollar amount of gross income for the licensure period that will end on the expiration date above:

Food: **\$100,000.00** Beer, Wine or Spirits: **\$110,000.00** Guest Rooms: **0**

3. Please indicate the type of alcoholic beverage to be sold: (check all that apply)

☒ Malt Liquor (beer) ☒ Wine ☒ Spirits

4. Indicate the type of license applying for: (choose only one)

- | | | |
|--|---|---|
| <input type="checkbox"/> Restaurant
(Class I, II, III, IV) | <input checked="" type="checkbox"/> Class A Restaurant/Lounge
(Class XI) | <input type="checkbox"/> Class A Lounge
(Class X) |
| <input type="checkbox"/> Hotel
(Class I, II, III, IV) | <input type="checkbox"/> Hotel – Food Optional
(Class I-A) | <input type="checkbox"/> Bed & Breakfast
(Class V) |
| <input type="checkbox"/> Golf Course (included optional licenses, please check if apply)
(Class I, II, III, IV) | <input type="checkbox"/> Auxiliary | <input type="checkbox"/> Mobile Cart |
| <input type="checkbox"/> Tavern
(Class IV) | <input type="checkbox"/> Other: _____ | |
| <input type="checkbox"/> Qualified Caterer | <input type="checkbox"/> Self-Sponsored Events (Qualified Caterers Only) | |

Refer to Section V for the License Fee Schedule on page 9

5. Business records are located at the following address:

1252 ROOSEVELT TRAIL RAYMOND, ME 04071

6. Is the licensee/applicant(s) citizens of the United States? ☒ Yes ☐ No

7. Is the licensee/applicant(s) a resident of the State of Maine? ☒ Yes ☐ No

NOTE: Applicants that are not citizens of the United States are required to file for the license as a business entity.

8. Is licensee/applicant(s) a business entity like a corporation or limited liability company?

☒ Yes ☐ No If Yes, complete Section VII at the end of this application

9. For a licensee/applicant who is a business entity as noted in Section I, does any officer, director, member, manager, shareholder or partner have in any way an interest, directly or indirectly, in their capacity in any other business entity which is a holder of a wholesaler license granted by the State of Maine?

☐ Yes ☒ No

☐ Not applicable – licensee/applicant(s) is a sole proprietor

10. Is the licensee or applicant for a license receiving, directly or indirectly, any money, credit, thing of value, endorsement of commercial paper, guarantee of credit or financial assistance of any sort from any person or entity within or without the State, if the person or entity is engaged, directly or indirectly, in the manufacture, distribution, wholesale sale, storage or transportation of liquor.

☐ Yes ☒ No

If yes, please provide details: _____

11. Do you own or have any interest in any another Maine Liquor License? ☐ Yes ☒ No

If yes, please list license number, business name, and complete physical location address: (attach additional pages as needed using the same format)

Name of Business	License Number	Complete Physical Address

12. List name, date of birth, place of birth for all applicants including any manager(s) employed by the licensee/applicant. Provide maiden name, if married. (attach additional pages as needed using the same format)

Full Name	DOB	Place of Birth
KYLE J. BANCROFT	10/14/1985	PORTLAND, MAINE
Residence address on all the above for previous 5 years		
Name	Address:	
KYLE BANCROFT	244 MEADOW RD. RAYMOND, ME 04071	
Name	Address:	
Name	Address:	
Name	Address:	

13. Will any law enforcement officer directly benefit financially from this license, if issued?

☐ Yes ☒ No

If Yes, provide name of law enforcement officer and department where employed:

14. Has the licensee/applicant(s) ever been convicted of any violation of the liquor laws in Maine or any State of the United States? ☐ Yes ☒ No

If Yes, please provide the following information and attach additional pages as needed using the same format.

Name: _____ Date of Conviction: _____

Offense: _____ Location: _____

Disposition: _____

15. Has the licensee/applicant(s) ever been convicted of any violation of any law, other than minor traffic violations, in Maine or any State of the United States? ☐ Yes ☒ No

If Yes, please provide the following information and attach additional pages as needed using the same format.

Name: _____ Date of Conviction: _____

Offense: _____ Location: _____

Disposition: _____

16. Has the licensee/applicant(s) formerly held a Maine liquor license? ☐ Yes ☒ No

17. Does the licensee/applicant(s) own the premises? ☐ Yes ☒ No

If No, please provide the name and address of the owner:

WILLIAM HAM 142 DARRICK TERRACE HOLLIS, ME

18. If you are applying for a liquor license for a Hotel or Bed & Breakfast, please provide the number of guest rooms available: N/A

19. Please describe in detail the area(s) within the premises to be licensed. This description is in addition to the diagram in Section VI. (Use additional pages as needed)

BAR, DINING AREA, DECK & PATIO AREA

20. What is the distance from the premises to the nearest school, school dormitory, church, chapel or parish house, measured from the main entrance of the premises to the main entrance of the school, school dormitory, church, chapel or parish house by the ordinary course of travel?

Name: LAXE REGION BAPTIST CHURCH

Distance: 0.2 MILES

Section II: Signature of Applicant(s)

By signing this application, the licensee/applicant understands that false statements made on this application are punishable by law. Knowingly supplying false information on this application is a Class D Offense under Maine's Criminal Code, punishable by confinement of up to one year, or by monetary fine of up to \$2,000 or by both.

Please sign and date in blue ink.

Dated: 7/1/23


Signature of Duly Authorized Person

Signature of Duly Authorized Person

KYLE BANCROFT
Printed Name Duly Authorized Person

Printed Name of Duly Authorized Person

Section III: For use by Municipal Officers and County Commissioners only

The undersigned hereby certifies that we have complied with the process outlined in 28-A M.R.S. §653 and approve this on-premises liquor license application.

Dated: _____

Who is approving this application? ☒ Municipal Officers of Raymond

☐ County Commissioners of _____ County

- ☐ **Please Note:** The Municipal Officers or County Commissioners must confirm that the records of Local Option Votes have been verified that allows this type of establishment to be licensed by the Bureau for the type of alcohol to be sold for the appropriate days of the week. Please check this box to indicate this verification was completed.

Signature of Officials	Printed Name and Title
	Joseph Bruno, chair
	Rolf Olsen, Vice-Chair
	Teresa Sadak
	Samuel Gifford
	Derek Ray

**This Application will Expire 60 Days from the date of
Municipal or County Approval unless submitted to the Bureau**

Included below is the section of Maine's liquor laws regarding the approval process by the municipalities or the county commissioners. This is provided as a courtesy only and may not reflect the law in effect at the time of application. Please see <http://www.mainelegislature.org/legis/statutes/28-A/title28-Asec653.html>

§653. Hearings; bureau review; appeal

1. Hearings. The municipal officers or, in the case of unincorporated places, the county commissioners of the county in which the unincorporated place is located, may hold a public hearing for the consideration of applications for new on-premises licenses and applications for transfer of location of existing on-premises licenses. The municipal officers or county commissioners may hold a public hearing for the consideration of requests for renewal of licenses, except that when an applicant has held a license for the prior 5 years and a complaint has not been filed against the applicant within that time, the applicant may request a waiver of the hearing.

A. The bureau shall prepare and supply application forms.

B. The municipal officers or the county commissioners, as the case may be, shall provide public notice of any hearing held under this section by causing a notice, at the applicant's prepaid expense, stating the name and place of hearing, to appear on at least 3 consecutive days before the date of hearing in a daily newspaper having general circulation in the municipality where the premises are located or one week before the date of the hearing in a weekly newspaper having general circulation in the municipality where the premises are located.

C. If the municipal officers or the county commissioners, as the case may be, fail to take final action on an application for a new on-premises license or transfer of the location of an existing on-premises license within 60 days of the filing of an application, the application is deemed approved and ready for action by the bureau. For purposes of this paragraph, the date of filing of the application is the date the application is received by the municipal officers or county commissioners. This paragraph applies to all applications pending before municipal officers or county commissioners as of the effective date of this paragraph as well as all applications filed on or after the effective date of this paragraph. This paragraph applies to an existing on-premises license that has been extended pending renewal. The municipal officers or the county commissioners shall take final action on an on-premises license that has been extended pending renewal within 120 days of the filing of the application.

D. If an application is approved by the municipal officers or the county commissioners but the bureau finds, after inspection of the premises and the records of the applicant, that the applicant does not qualify for the class of license applied for, the bureau shall notify the applicant of that fact in writing. The bureau shall give the applicant 30 days to file an amended application for the appropriate class of license, accompanied by any additional license fee, with the municipal officers or county commissioners, as the case may be. If the applicant fails to file an amended application within 30 days, the original application must be denied by the bureau. The bureau shall notify the applicant in writing of its decision to deny the application including the reasons for the denial and the rights of appeal of the applicant.

2. Findings. In granting or denying an application, the municipal officers or the county commissioners shall indicate the reasons for their decision and provide a copy to the applicant. A license may be denied on one or more of the following grounds:

A. Conviction of the applicant of any Class A, Class B or Class C crime;

B. Noncompliance of the licensed premises or its use with any local zoning ordinance or other land use ordinance not directly related to liquor control;

C. Conditions of record such as waste disposal violations, health or safety violations or repeated parking or traffic violations on or in the vicinity of the licensed premises and caused by persons patronizing or employed by the licensed premises or other such conditions caused by persons patronizing or employed by the licensed premises that unreasonably disturb, interfere with or affect the ability of persons or businesses residing or located in the vicinity of the licensed premises to use their property in a reasonable manner;

D. Repeated incidents of record of breaches of the peace, disorderly conduct, vandalism or other violations of law on or in the vicinity of the licensed premises and caused by persons patronizing or employed by the licensed premises;

D-1. Failure to obtain, or comply with the provisions of, a permit for music, dancing or entertainment required by a municipality or, in the case of an unincorporated place, the county commissioners;

E. A violation of any provision of this Title;

F. A determination by the municipal officers or county commissioners that the purpose of the application is to circumvent the provisions of section 601; and

G. After September 1, 2010, server training, in a program certified by the bureau and required by local ordinance, has not been completed by individuals who serve alcoholic beverages.

3. Appeal to bureau. Any applicant aggrieved by the decision of the municipal officers or county commissioners under this section may appeal to the bureau within 15 days of the receipt of the written decision of the municipal officers or county commissioners. The bureau shall hold a public hearing in the city, town or unincorporated place where the premises are situated. In acting on such an appeal, the bureau may consider all licensure requirements and findings referred to in subsection 2.

A. Repealed

B. If the decision appealed from is an application denial, the bureau may issue the license only if it finds by clear and convincing evidence that the decision was without justifiable cause.

4. Repealed

5. Appeal to District Court. Any person or governmental entity aggrieved by a bureau decision under this section may appeal the decision to the District Court within 30 days of receipt of the written decision of the bureau.

An applicant who files an appeal or who has an appeal pending shall pay the annual license fee the applicant would otherwise pay. Upon resolution of the appeal, if an applicant's license renewal is denied, the bureau shall refund the applicant the prorated amount of the unused license fee.

Section IV: Terms and Conditions of Licensure as an Establishment that sells liquor for on-premises consumption in Maine

- The licensee/applicant(s) agrees to be bound by and comply with the laws, rules and instructions promulgated by the Bureau.
- The licensee/applicant(s) agrees to maintain accurate records related to an on-premise license as required by the law, rules and instructions promulgated or issued by the Bureau if a license is issued as a result of this application.
 - The licensee/applicant(s) authorizes the Bureau to obtain and examine all books, records and tax returns pertaining to the business, for which this liquor license is requested, and also any books, records and returns during the year in which any liquor license is in effect.
- Any change in the licensee's/applicant's licensed premises as defined in this application must be approved by the Bureau in advance.
- All new applicants must apply to the Alcohol and Tobacco Tax and Trade Bureau (TTB) for its [Retail Beverage Alcohol Dealers](https://www.ttb.gov/nrc/retail-beverage-alcohol-dealers) permit. See the TTB's website at <https://www.ttb.gov/nrc/retail-beverage-alcohol-dealers> for more information.

Section V: Fee Schedule

Filing fee required. In addition to the license fees listed below, a filing fee of \$10.00 must be included with all applications.

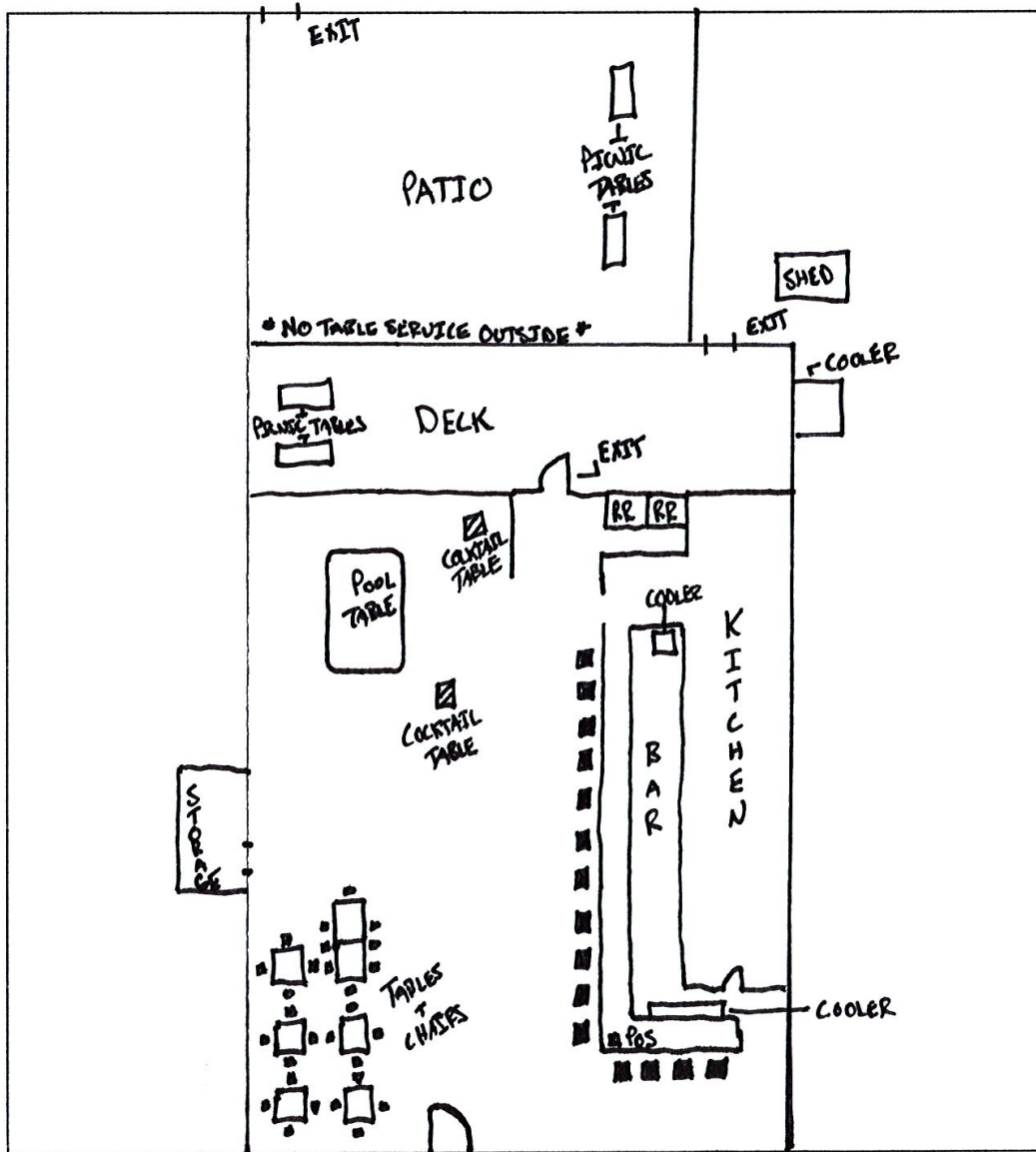
Please note: For Licensees/Applicants in unorganized territories in Maine, the \$10.00 filing fee must be paid directly to County Treasurer. All applications received by the Bureau from licensees/applicants in unorganized territories must submit proof of payment was made to the County Treasurer together with the application.

Class of License	Type of liquor/Establishments included	Fee
Class I	For the sale of liquor (malt liquor, wine and spirits) This class includes: Airlines; Civic Auditoriums; Class A Restaurants; Clubs with catering privileges; Dining Cars; Golf Courses; Hotels; Indoor Ice-Skating Clubs; Indoor Tennis Clubs; Vessels; Qualified Caterers	\$ 900.00
Class I-A	For the sale of liquor (malt liquor, wine and spirits) This class includes only hotels that do not serve three meals a day.	\$1,100.00
Class II	For the Sale of Spirits Only This class includes: Airlines; Civic Auditoriums; Class A Restaurants; Clubs with catering privileges; Dining Cars; Golf Courses; Hotels; Indoor Ice-Skating Clubs; Indoor Tennis Clubs; and Vessels.	\$ 550.00
Class III	For the Sale of Wine Only This class includes: Airlines; Civic Auditoriums; Class A Restaurants; Clubs with catering privileges; Dining Cars; Golf Courses; Hotels; Indoor Ice-Skating Clubs; Indoor Tennis Clubs; Restaurants; Vessels; Pool Halls; and Bed and Breakfasts.	\$ 220.00
Class IV	For the Sale of Malt Liquor Only This class includes: Airlines; Civic Auditoriums; Class A Restaurants; Clubs with catering privileges; Dining Cars; Golf Courses; Hotels; Indoor Ice-Skating Clubs; Indoor Tennis Clubs; Restaurants; Taverns; Pool Halls; and Bed and Breakfasts.	\$ 220.00
Class III and IV	For the Sale of Malt Liquor and Wine Only This class includes: Airlines; Civic Auditoriums; Class A Restaurants; Clubs with catering privileges; Dining Cars; Golf Courses; Hotels; Indoor Ice-Skating Clubs; Indoor Tennis Clubs; Restaurants; Vessels; Pool Halls; and Bed and Breakfasts.	\$ 440.00
Class V	For the sale of liquor (malt liquor, wine and spirits) This class includes only a Club without catering privileges.	\$ 495.00
Class X	For the sale of liquor (malt liquor, wine and spirits) This class includes only a Class A Lounge	\$2,200.00
Class XI	For the sale of liquor (malt liquor, wine and spirits) This class includes only a Restaurant Lounge	\$1,500.00

Section VI Premises Floor Plan

In an effort to clearly define your license premise and the areas that consumption and storage of liquor authorized by your license type is allowed, the Bureau requires all applications to include a diagram of the premise to be licensed.

Diagrams should be submitted on this form and should be as accurate as possible. Be sure to label the following areas: entrances, office area, coolers, storage areas, display cases, shelves, restroom, point of sale area, area for on-premise consumption, dining rooms, event/function rooms, lounges, outside area/decks or any other areas on the premise that you are requesting approval. Attached an additional page as needed to fully describe the premise.



Section VII: Required Additional Information for a Licensee/Applicant for an On-Premises Liquor License Who are Legal Business Entities

Questions 1 to 4 of this part of the application must match information in Section I of the application above and match the information on file with the Maine Secretary of State's office. If you have questions regarding your legal entity name or DBA, please call the Secretary of State's office at (207) 624-7752.

All Questions Must Be Answered Completely. Please print legibly.

1. Exact legal name: BATALE HOLDINGS LLC
2. Doing Business As, if any: EAST SHORE TAVERN
3. Date of filing with Secretary of State: 5/26/2020 State in which you are formed: MAINE
4. If not a Maine business entity, date on which you were authorized to transact business in the State of Maine:
N/A
5. List the name and addresses for previous 5 years, birth dates, titles of officers, directors, managers, members or partners and the percentage ownership any person listed: (attached additional pages as needed)

Name	Address (5 Years)	Date of Birth	Title	Percentage of Ownership
KYLE BANCROFT	244 MEADOW RD. RAYMOND ME	10/14/85	MANAGER	100%

(Ownership in non-publicly traded companies must add up to 100%.)

Special Amusement Application - East Shore Tavern



Town of Raymond
401 Webbs Mills Road
Raymond, Maine 04071
207.655.4742

SPECIAL AMUSEMENT APPLICATION

Pursuant to the Town of Raymond Special Amusement Ordinance and 28-A MRSA §1054

1. Name of Applicant: BATALI HOLDINGS LLC
2. Address of Applicant: P.O. BOX 896 RAYMOND, ME 04071
3. Name of Business: EAST SHORE TAVERN
4. Business Street Address: 1248 ROOSEVELT TRAIL RAYMOND, ME 04071
5. Business Mailing Address: P.O. BOX 896 RAYMOND, ME 04071
6. Telephone – Cell: 207-807-0842 Business: 207-655-6481
7. List the names and addresses of all officers and their residency for the preceding 3 years.

KYLE BANCROFT P.O. BOX 846 RAYMOND, ME 04071

8. Have any of the officers been convicted of a Class A, B, or C crime in the last 3 years?
If so, who and describe the offense:

NONE

9. Please describe the premises including security measures being taken, size, seating, etc.

OPEN ROOM, PATIO AREA, SECURITY LATE / WEEKENDS

10. Has applicant ever had a license denied or revoked? If so, describe the circumstances.

NO

11. Please specify the type of entertainment in detail: [If extra space is required, please attach a separate piece of paper.]

DJ, LIVE MUSIC, OPEN MIC NIGHT

12. List the days and hours of entertainment:

8PM - 12AM

NOTE: "I understand that false statements made on this form are punishable by law. Knowingly supplying false information on this form is a Class D offense under the Criminal Code, punishable by confinement of up to one year or by monetary fine of up to \$500.00 for each offense or by both. Each day that a violation occurred shall be considered a separate offense."

13. The fee must be paid at the time of application. The application fee is \$50.00 plus all advertising costs if a public hearing is necessary.



Signature of Applicant

7/28/23

Date

NOTE: Special amusement permits expire at the same time as the liquor license.

Conditions of Approval: _____

Authorizing signatures:

Code Enforcement Officer: _____

Public Safety: _____

Town Manager: _____

Select Board: _____

Business License Application - Paul & Adelen Phillippine Store



Business License Application

OFFICIAL USE

Permit Fee: \$25.00

Application Date: 8/15/23

Map-Lot: _____

Zone: _____

Business Name: Paul's & Adele's Philippine Store
Business Location: 302 Raymond (1263 Roosevelt Trl Unit 6)
Applicant: Paul Wells
Mailing Address: 32 DAWN ST.
City State Zip: Mechanic Falls 04256
Home Telephone: 207-500-1198 Work Telephone: Same
Email Address: Paulsdrywall@yahoo.com
Description of Business: Asian Store

Owners/Partners Names	Owners/Partners Address	Owners/Partners Phone #s
<u>Paul Wells</u>	<u>32 DAWN ST.</u> <u>Mechanic Falls</u>	
Emergency Contact Names	Emergency Phone # 1	Emergency Phone # 2
	<u>207-346-8398</u>	

I have secured or am in the process of securing all State and local licenses/permits required for my business to operate. Please list required licenses/permits:

Have there been any public health, safety, or welfare problems occurring in the operation of the business or a similar business at the same location in the immediately preceding year, including but not limited to neighborhood complaints, disorderly customers, and excessively loud or unnecessary noise that initiated complaints to or required a response from the sheriff's department fire department or other municipal regulatory body or employee? ☐ Yes ☒ No

If Yes, please provide evidence of satisfactory resolution of any such complaint.

Applicant Signature: Paul Wells

Paul's & Adelen Philippine Store

Asian Grocery

Fish, bbq Pork, BBQ Chicken

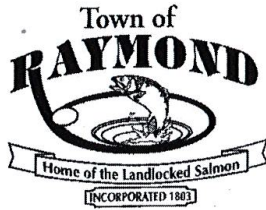
Can Good, Noodles Coffee, & More

PLease Call 207-500-1198 Or 207-5008036

Delivery

OR Come Pickup

Business License Application - Campmasters



Business License Application

OFFICIAL USE

Permit Fee: \$25.00

Application Date: _____

Map-Lot: _____

Zone: _____

Business Name: CAMPMASTERS
Business Location: "SEBAGO Outfitters" Rt 302 "Shared building"
Applicant: Santino TARSETTI
Mailing Address: P.O. BOX 181
City State Zip: RAYMOND, ME 04071
Home Telephone: Work Telephone: 207-776-2611
Email Address: +tarsetti87@gmail.com
Description of Business: CAMP MAINTENANCE, DOCKS
Kayak, racks, picnic tables. CAMP supplies.

Owners/Partners Names	Owners/Partners Address	Owners/Partners Phone #s
Santino Tarsetti	30 MASS AVE RAYMOND, ME	207 - 776-2611
Emergency Contact Names	Emergency Phone # 1	Emergency Phone # 2
JAMES TARSETTI		207-650-5304
ZAK Sherman		518-791-9416

I have secured or am in the process of securing all State and local licenses/permits required for my business to operate. Please list required licenses/permits:

N/A N/A

Have there been any public health, safety, or welfare problems occurring in the operation of the business or a similar business at the same location in the immediately preceding year, including but not limited to neighborhood complaints, disorderly customers, and excessively loud or unnecessary noise that initiated complaints to or required a response from the sheriff's department fire department or other municipal regulatory body or employee? ☐ Yes ☒ No

If Yes, please provide evidence of satisfactory resolution of any such complaint.

Applicant Signature: Santino Tarsetti

KRT Appraisal Revaluation Proposal



INTEROFFICE MEMORANDUM

TO: TOWN OF RAYMOND SELECT BOARD
FROM: CURT LABEL, ASSESSORS AGENT
SUBJECT: AWARDING OF 2026 REVALATION PROJECT
DATE: 9/7/23
CC: SUE LOOK, INTERIM TOWN MANAGER

Dear Board Members,

The town has received two proposals in response to its RFP for a 2026 town-wide revaluation. A committee comprised of myself, town department heads, and one assessor/selectboard member have reviewed the proposals and interviewed representatives from the two companies, and we are pleased to recommend that KRT Appraisal be awarded the contract for the real property portion of the 2026 revaluation project.

Both proposals were very similar in terms of cost, timeline and project approach. Both companies demonstrated the capacity to perform the real property portion of the project within the guidelines of the RFP and within the time frame specified. Ultimately, KRT was selected because of their staff's overall and direct experience in Raymond and other similar Maine municipalities. The lead appraiser scheduled for the project was also the appraiser on Raymonds last revaluation and already has a high level of familiarity with the Town, despite the time that has elapsed. The lead appraiser, project manager and company president have worked with myself and other Raymond staff on other revaluation projects elsewhere and demonstrated a level of excellence in the development and implementation of mass appraisal models and

public relations. All three principle appraiser's scheduled to work on this project are certified Maine assessors, which also differentiated KRT from the competition in terms of Maine specific qualifications. 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 \$295,000, KRT's quoted price along with its rate of \$125/hr. for additional defense of values was slightly lower than the competing proposal.

Neither proposal offered a quote for the Personal Property component of the project. A discussion and decision about issuing a separate RFP for Personal Property in the near future should take place. KRT has indicated that they have recently hired a Personal Property appraiser with over 20 years of experience and will likely respond with a proposal for personal property but was unable to do so at the time of this RFP. Vison Government Solutions indicated that they still use a subcontracting company (RRC) for personal property but did not include this in their proposal. They indicated that perhaps RRC may be interested in submitting its own proposal in the future in response to a personal property RFP.

A copy of KRT proposal is attached to this memo.

I, along with a representative from KRT will attend your September 12 meeting to answer questions and seek approval to move forward with the contracting phase of the project.

Sincerely,

Curt Lebel, Assessors Agent

Town of Raymond, Maine



Proposal for a 2026 Full Revaluation Project

KRT Appraisal



ORIGINAL

Town of Raymond, Maine



Proposal for a 2026 Full Revaluation Project

KRT Appraisal

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

July 21, 2023

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G:	Resumes
H:	Copy of RFP/RFP Exceptions

July 21, 2023

Curt Lebel
Raymond Assessor
401 Webbs Mills Road
Raymond, ME 04071

Price Proposal

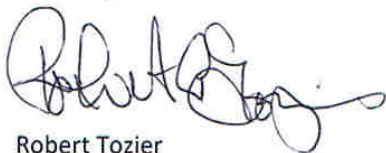
Dear Mr. Lebel:

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

Based on the estimated parcel count (3,875) and scope of services contained in this proposal, the cost for a 2026 Full Revaluation is **Two Hundred Ninety Five Thousand Dollars (\$295,000)** using the Town'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

July 21, 2023

Curt Lebel
Raymond Assessor
401 Webbs Mills Road
Raymond, ME 04071

Letter of Transmittal

Dear Mr. Lebel:

The following report is submitted in response to your Request for Proposals (RFP), for the Town of Raymond, 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 Town 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 call 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 2026 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 a superior product 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
2026 REAL PROPERTY EQUALIZATION PROJECT

1) PROFILE OF RAYMOND, MAINE

1.1: Raymond is a resort town in Cumberland County, Maine, United States with a population of 4,536 at the 2020 census. It is a summer recreation area and is part of the Portland–South Portland–Biddeford, Maine metropolitan statistical area. Raymond Neck is the landing for the ferry to the town of Frye Island in Sebago Lake. It contains approximately 3,875 parcels.

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 Town of Raymond 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, 2026.

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: For purposes of this proposal, 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 Town.

A) Data Collection

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

2.A.2: KRT will conduct an on-site exterior measurement and attempt an interior inspection of all properties within the Town. All KRT employees will have proper identification (KRT Badge or Town ID) as well as a letter from the Town 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 Town and the property owners.

2.A.6: KRT will update the Town's image file by taking a new photo of all improved properties within the Town. 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, 2026. 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 Town 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 Town. 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 Town 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 Town.

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 Town 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 Town. Hearings will take place at a convenient location designated by the Town.

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 at least five (5) days and will ensure that any property owner who calls during the specified timeframe will get the chance to have an informal hearing. KRT will offer phone appointments in-lieu of meeting in-person..

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 Town one (1) assessment manual titled "*Assessment Manual, Town of Raymond, 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, 2026.

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 Town of Raymond's taxpayers, Town Officials, Agents, and Town Employees.

3.2: KRT, if requested by the Town, will hold informational meetings for the Raymond 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 Town 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 Town 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 Town 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 Town. Below is the proposed revaluation timeline:

<u>Task</u>	<u>Start Date</u>	<u>Completion Date</u>
Execution of Contract	11/13/23	11/17/23
Start-Up Meeting	11/20/23	12/01/23
Public Relations	On-going	
Data Collection/Callbacks	02/05/24	03/27/26
Data Entry	02/12/24	04/03/26
Field Review Sales	04/06/26	04/10/26
Update Tables	04/13/26	05/01/26
Field Review	05/04/26	05/22/26
Final Valuations	05/25/26	06/12/26
Town Review	06/15/26	06/26/26
Impact Notices	06/29/26	07/03/26
Informal Hearings	07/06/26	07/17/26
Hearing Review	07/20/26	07/24/26
Final Products Delivered	07/27/26	07/31/26
Project Completion		07/31/26

4.2: The Town 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 Town shall charge KRT a penalty of \$500 per calendar day for failure to turn over all deliverables required by the contract deadline date of July 31, 2026.

5) EQUIPMENT AND SUPPLIES

5.1: The Town 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 Town 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 Town 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 Town:

- a) Database in good working order with updated values.
- b) A neighborhood map.
- c) 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 Town.

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 Town may require KRT to submit substantiating production reports from the project manager prior to making any payments on the contract.

6.3: The Town 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 Town determines that KRT's invoice is inaccurate, the Town shall give written notice specifying exactly which portion(s) is found to be unsatisfactory. KRT shall make every effort to correct the inaccuracy. The Town 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 Town and KRT. Upon satisfactory resolution, the Town shall pay KRT said amount due, less fifteen percent (15%).

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

- a) Ten percent (10%) once final notices have been mailed from the informal hearings, and;

- b) Five percent (5%) once the revaluation USPAP manual has been received by the Town.

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 Town, 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 Town 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 Town 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 Town, provided however, that claims for money due or to become due to KRT from the Town 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 Town, any such assignment shall be expressly made subject to all defenses, set offs, or counterclaims which would have been available to the Town 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 to utilize all the technology that is 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:

Title	Name	Years of Experience
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 Town, in writing, for review and approval. The Town 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 Town shall reserve the right to make final determination regarding the acceptability 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 Towns 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>
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
Waterford, ME	1,925	Full Revaluation	2025	John Bell	(207) 583-4403
Farmington, ME	3,705	Full Revaluation	2025	Cornell Knight	(207) 778-6530
Nobleboro, ME	1,650	Full Revaluation	2025	Dennis Reed	(207) 563-8816
New Sharon, ME	1,275	Full Revaluation	2024	Travis Pond	(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
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
Oxford, ME	2,975	Full Revaluation	Current	Adam Garland	(207) 539-4431
Sullivan, ME	1,275	Full Revaluation	Current	Stacy Tozier	(207) 422-6282
Biddeford, ME	800	Commercial Revaluation	Current	Nicholas Desjardins	(207) 284-9003
Troy, NH	1,200	Full Revaluation	Current	Mary Guild	(603) 242-7722
Cape Elizabeth, ME	4,500	Full Revaluation	Current	Clint Swett	(207) 799-1619
Franklin, NH	3,750	Statistical Revaluation	Current	Judie Milner	(603) 934-3900
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
Winslow, ME	3,300	Cyclical Revaluation (2021-2023)	Current	Judy Mathiau	(207) 872-2776
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
Bethlehem, NH	2,200	Contract Assessor/Cyclical Revaluation (2021-2023)	Current	Mary Moritz	(603) 869-3351
Gorham, NH	1,700	Contract Assessor	Current	Michelle Lutz	(603) 466-3322
Kingston, NH	3,150	Contract Assessor/Cyclical Revaluation (2019-2023)	Current	Susan Ayer	(603) 642-3342
Grantham, NH	2,500	Contract Assessor	Current	Melissa White	(603) 863-6021
Harpwell, 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
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
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	3,700	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
Littleton, NH	3,400	Statistical Revaluation	2020	Andrew Dorsett	(603) 444-3996
Baldwin, ME	1,100	Full Revaluation	2020	Ben Thompson	(207) 699-2475
Rockland, ME	3,700	Statistical Revaluation	2020	Roxy LaFrance	(207) 594-0303
Brentwood, NH	1,850	Full Revaluation	2020	Karen Clement	(603) 642-6400
Lyman, ME	2,800	Full Revaluation	2020	Alex Konczal	(207) 247-0645
Grantham, NH	2,500	Statistical Revaluation	2020	Melissa White	(603) 863-6021
Rindge, NH	2,800	Cyclical Revaluation (2018-2020)	2020	Roberta Oeser	(603) 899-5181
Berlin, NH	4,600	Contract Assessor/Cyclical Data Collection	2020	James Wheeler	(603) 752-7532
Hudson, NH	2,073	Data Collection	2020	Jim Michaud	(603) 434-7530
Milford, NH	200	Data Collection 200 C/I Parcels	2020	Marti Noel	(603) 249-0615
Scarborough, ME	9,000	Statistical Revaluation	2019	Larissa Crockett	(207) 730-4149
Milford, NH	5,500	Residential Statistical Revaluation	2019	Marti Noel	(603) 249-0615
Hudson, NH	2,250	Cyclical Data Collection	2019	Jim Michaud	(603) 434-7530
Belmont, NH	4,300	Cyclical Revaluation (2017-2019)	2019	Alicia Jipson	(603) 267-8300
Nashua, NH	28,500	Statistical Revaluation	2018	Kim Kleiner	(603) 589-3040



Town of Rockport, Maine

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

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



THE CITY OF NASHUA

"The Gate City"

*Financial Services Division
Office of the Chief Financial Officer*

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,

John L. Griffin

Chief Financial Officer

229 Main Street • Nashua, New Hampshire 03060 • Phone (603) 589-3173

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

Connecticut Office of Policy and Management: Certified Assessment Supervisor, Certificate No: 823 Expires April 30, 2023.

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 1 (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, LYNNFIELD, 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



Town of Raymond | 401 Webbs Mills Rd, Raymond, ME 04071 | 207-655-4742 | www.raymondmaine.org

Request for Proposals Property Revaluation Project

PROJECT SUMMARY

The Town of Raymond seeks competitive proposals for a complete revaluation of all taxable and tax-exempt real and personal property within the Town of Raymond, Maine (Town) effective **no later than** April 1, 2026 (The effective date). The expected tax commitment date, using these values, is mid-September immediately following the effective date.

BACKGROUND

The “Home of the Landlocked Salmon,” Raymond is located on beautiful Sebago Lake and has six other lakes and ponds within its boundaries. The town offers a uniquely peaceful and healthy living environment yet is also an easy commute to both Portland and Lewiston-Auburn metropolitan centers. An active and diverse business community is located along Route 302.

Raymond is an all-season recreational center close to the Western Maine and New Hampshire Mountain regions. Many lakes and easy access to the mountains create an ideal environment for outdoor enjoyment. Travel is enhanced by major commuter routes, which lead to other opportunities for health, arts, and business.

The Town welcomes its summertime residents and guests who swell the population nearly three-fold as vacationers gravitate to Raymond to experience the way life should be!

Raymond spans 44.75 square miles, 11.57 of which are lakes, ponds, and rivers. According to the 2020 U.S. decennial Census, the Town's full time population is 4,536.

The last full revaluation was in 2005.

The Town uses Vision (VGSI) CAMA system Version 8 for both real and personal property, which is hosted and maintained on the Town's local server system. This system is utilized for the valuation of both real and personal estates. VGSI also serves as the web host of Raymond's assessment data online.

There are approximately 3,875 total real estate accounts. Included in which are approximately 150 accounts which are boat slips, 80 commercial and industrial properties and 64 exempt properties. The commercial properties are largely small-medium scale retail stores and service business, along with some light manufacturing facilities.

There are approximately 215 business personal property accounts with BETE accounts averaging approximately 25 per year. Approximately 100 of the 215 accounts are camper/park model trailers located at one campground and one seasonal camper subdivision development.

The town's preliminary 2024 equalized State Valuation is \$1,889,350,000.

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 Town of Raymond, 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 Board of Assessors and/or Assessors Agent 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 Raymond.
 - 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 Town in evaluating the Proposal.

PROPOSAL DEADLINE AND BID OPENING

Sealed Proposal shall be clearly marked “**PROPOSAL–REVALUATION PROJECT**” and addressed to **Assessors Agent, Town of Raymond, 401 Webbs Mills Rd, Raymond, ME 04071** and shall be supplemented by an electronic copy sent to curt.lebel@Raymondmaine.org.

Anticipated RFP Timeframe:

Proposal Deadline	Wednesday, July 26, 2023 4 PM EST
Proposal/Bid Opening	Thursday, July 27, 2023
Proposal Evaluations/Selection of Company	Tuesday, September 12, 2023
Execution of Contract by Company	Thursday November 16, 2023
Performance Bond ¹	Agreed upon percentage with Town

¹ Said bond or check shall be given as security, that if the Proposal is accepted a Contract will be entered into. The proposal bond or check shall be forfeited and the principal amount of said proposal bond shall be paid to the Town. The agreed upon amount with the Town shall cover liquidated damages in case of failure to enter Contract.

Proposals received prior to the time of opening will remain sealed. All Proposals shall be delivered by **4:00 P.M. on July 26, 2023**. Proposals shall be opened publicly at 10:00 am on Thursday, July 27, 2023.

FINAL SELECTION EVALUATION CRITERIA

The Board of Assessors and/or Assessors Agent and the Town of Raymond 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. April 2, 2025, or April 1, 2026
- ii. Provide a schedule of deliverables and any other relevant milestones.
- iii. 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 Town 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 Town deems to be in the best interest of the Town whether it is the lowest dollar Proposal or not. On or before **September 30, 2023**, the Town will notify the selected Company that it has been selected.

GENERAL CONTRACT CONDITIONS

On or before **December 1, 2023**, the selected Company shall execute with the Town 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 Town.

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

Periodic Payments: The Town will pay the Company amounts as billed less a ten (10%) percent retainage through conclusion of the local appeal process.

Surety:

1. The company shall provide a performance bond or other surety acceptable to the Town of Raymond for not less than one hundred percent (100%) of the total contract price with a corporate surety to be conditioned upon the faithful fulfillment of the total contract.
2. If Sub-Companies are used payment surety must be submitted in a form as approved and accepted by the Town of Raymond.

Indemnification and Insurance:

1. The Company agrees to defend and indemnify the Town 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 Town 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 Town, 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 Town:
 - 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 Town 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 Board of Assessors and/or Assessors Agent 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 schedule:

- 1 to 10 working days = \$300 per day
- 11 to 20 working days = \$600 per day
- Over 20 working days = \$1,200 per day
- a) All properties measured, listed and photographed through the effective date of the Project
- b) All completed assessments given to Board of Assessors and/or Assessors Agent for review
- c) All assessment notices addressed and mailed
- d) Informal hearings completed
- e) Final values in Vision and all revaluation records, items and systems are delivered to the Assessor's Agent Office in accordance with the General Contract Conditions

Notwithstanding mutually agreed upon extensions, failure to meet the contracted deadline for completion of the Project shall be cause for payment of liquidated damages by the Company, on demand by the municipal officials, of One Thousand (\$1,200) for each day beyond the specified date of completion.

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.

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

Curt Lebel
Assessors Agent, Town of Raymond
401 Webbs Mills Rd
Raymond, Maine 04071

Additional Requirements: The Town 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 Board of Assessors and/or Assessors Agent. Thereafter the Company must continue in a diligent manner to ensure completion within the schedule of completion dates as set forth below.

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 and 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 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 Board of Assessors and/or Assessors Agent

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 Board of Assessors.
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 Board of Assessors with formal appeals
20. Assist the Board of Assessors with appeals to Board of Assessment Review

RESPONSIBILITIES OF REVALUATION COMPANY

The Company's Project Manager and Board of Assessors 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 Town.

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 Town. 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 used 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 Board of Assessors

14. The Company shall provide training for appropriate Town 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 Board of Assessors in conducting a public information program. All public information releases shall be approved by the Board of Assessors prior to release. The Company shall submit a detailed public relations plan to the Town 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 Town 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 Board of Assessors.

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 Town's CAMA system by the Company.

Field Work Quality Check: At the end of each month the Company shall provide the Board of Assessors and/or Assessors Agent with pdf files of each updated property record card until the completion of the public hearings. The Assessors Agent may conduct checks to ensure quality of data collection. The Company shall notify the Assessors Agent monthly of the region of Town field collection will take place in the following month so that the information can be posted on the Town's website. In addition, all changes made by the Assessors Agent in property values as a result of these reviews will be changed by the Company within one week of receiving the changes.

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 Board of Assessors.

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 Board of Assessors and/or Assessors Agent prior to mailing. The duplicate copies will be delivered to the Assessors Agent 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 Town.

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 Town shall cooperatively update the Towns 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 Town 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 Town, may be held on weeknights and Saturdays as well as during business hours. Members of the Town's Assessing Department staff may also be present at hearings.

The Company, in conjunction with recommendations of the Town, shall schedule a sufficient number of hearings and provide sufficient qualified personnel certified by the State of Maine and approved by the Town to handle said hearings expeditiously and fairly.

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 Board of Assessors.

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 Raymond project shall be present or available at the request of the Board of Assessors and/or Assessors Agent for the period of time necessary to assist in considering abatement requests and to assist the Board of Assessors and/or Assessors Agent in explaining the basis of the revaluation to property owners.

The Company agrees that the Project Manager in charge of the Raymond 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 Raymond 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 Town.

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 Board of Assessors and/or Assessors Agent, 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 Town.

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 Town in compliance with Maine law. **The Company should reference, in its response to the RFP, how it intends to facilitate inspections in relationship to Raymond's high volume of seasonal property owners.**

The Company shall make a listing of physical construction details of all the structural improvements pertinent to residential property in the Town 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 Assessor's Agent.

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

Call Backs: Where necessary the Company shall make one (1) call back, which must be on a weekday between 5:00 PM and 8:00 PM, or on a Saturday. 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 Town) 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 Town Acceptance: Prior to the mailing of the assessment notices, the Company's Project Manager will review the final values with the Board of Assessors to ensure that the Assessors Agent is prepared to accept the Company's work.

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 Board of Assessors and/or Assessors Agent, which shall become the property of the Town. Proprietary information of property owners shall not become a public record.

The Company shall develop, with the involvement of the Board of Assessors and/or Assessors Agent, 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 Town 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 Board of Assessors and/or Assessors Agent and be bound by the Assessors Agents' determination.

The Assessors Agent 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 Towns Vision CAMA system.

The Company shall value and record in the Towns CAMA system all BETE exempt equipment and exempt amounts and submit the qualifying applications to the Assessors Agent 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 Board of Assessors shall make the final determination.

Preliminary Town 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 Board of Assessors and/or Assessors Agent to ensure that the Town is prepared to accept the Company's work. The Board of Assessors and/or Assessors Agent will make the final judgment on the final value.

APPENDIX B - RESPONSIBILITY OF TOWN

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

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

CAMA Database & CAMA Software: The Board of Assessors will make available to the Company the current CAMA database.

Property Transfers: The Town 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 Town 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 Board of Assessors and/or Assessors Agent shall furnish letters of introduction and authority to inspect real estate in the Town along with suitable identification badges.

Mailing Address: The Town shall furnish through the Assessor Agent's 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 Town to investigate all returned mail for updated name or address and to re-mail such mail.

Office Space: The Town 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 Board of Assessors and/or Assessors Agent may, from time to time, accompany listers/appraisers on property visits.

APPENDIX C – DEFINITIONS

Assessors/Board of Assessors: shall mean the duly appointed Assessors of the Town of Raymond, Maine
CAMA: shall mean Computer Assisted Mass Appraisal

Assessors Agent: Shall mean the Board of Assessors duly appointed, designated representative.

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 Town 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 Town of Raymond

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

Town: shall mean the Town of Raymond, 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/hour for all 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 forty four thousand two hundred fifty dollars (\$44,250). This money shall be held from each invoice and returned to KRT upon successful completion of the project.
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 \$500/day for all days late.

Tax Rate & Commitment FY2023-2024



INTEROFFICE MEMORANDUM

TO: TOWN OF RAYMOND BOARD OF ASSESSORS
FROM: CURT LEBEL, ASSESSORS AGENT
SUBJECT: TAX RATE AND COMMITMENT OF FY2023-2024 PROPERTY TAXES
DATE: 9/7/23
CC: SUE LOOK, INTERIM TOWN MANAGER

Dear Board Members,

The assessing office has completed its annual preparation for tax commitment. Taxable valuation has increased this year by approximately 10.5 million dollars' valuation and comes in at \$1,071,991,940.00. New residential construction in Raymond remains robust, with several new residential homes underway which should be completed for the upcoming 2024 assessment next year. Due to real estate market appreciation, the town's certified assessment ratio will be 74% of market value for this year (reflective of sales through June 2021). Homestead, veterans, and blind exemptions, as well as personal property assessments have been adjusted by this amount as prescribed by law. More residual appreciation effects of the pandemic on local real estate values will continue be reflected in the certified ratio next year.

This year, budget appropriations approved by voters, or their representatives have increased property taxes for this fiscal year by over 1 million which will necessitate an increase in the tax rate over last year's 15.00 rate.

TAX COMPARISON (2022-2023) *Uses a sample \$15.80 rate						
	2022 (FY23)	Mils	2023 (FY24)	Mils	Difference	% chg in Tax
School	\$ 11,370,566.74	0.01071	\$ 11,940,729.34	0.01114	\$ 570,162.60	5.0%
County	\$ 817,347.00	0.00077	\$ 974,325.00	0.00091	\$ 156,978.00	19.2%
Municipal	\$ 3,406,942.82	0.00321	\$ 3,711,906.50	0.00346	\$ 304,963.68	9.0%
Tax Increment Financing	\$ 266,042.93	0.00025	\$ 270,483.28	0.00025	\$ 4,440.35	1.7%
Overlay	\$ 58,816.21	0.00006	\$ 40,028.53	0.00004	\$ (18,787.68)	-31.9%
Total Tax Commitment	\$ 15,919,715.70	0.015	\$ 16,937,472.65	0.0158	\$ 1,017,756.95	6.4%

*County tax for FY24 includes \$80,574 for 6 month fiscal year transitional assessment (payment #1 of 5)

The senior tax stabilization program will be implemented this year but has been repealed by the legislature beginning with next year's assessment. Taxpayers enrolled will be issued a tax bill which will be no higher than last years tax, despite the rate increase. The Town's tax billing system (Trio) will calculate the total differential and post it to a receivable account which will be filed with Maine Revenue for reimbursement in early 2024.

This year, the voters at the annual Town meeting have authorized the Select Board to utilize up to \$200,000 in undesignated fund balance to reduce the tax commitment.

Below, please find three potential tax rate options for the Board to consider, which designate options for the Board's approved use of fund balance to reduce the tax commitment and result in an overlay which is consistent with the past few years.

The minimum rounded tax rate available is \$15.80 utilizing the full \$200,000 of fund balance available.

The options attached range from \$15.80 to \$16.00 per thousand.

Upon selection of a tax rate for 2023, I will have the necessary Warrants and Certificates prepared for Board signatures the following day.

Curt Lebel, Assessors Agent

PROPERTY TAX REVENUES

	LAST YEAR (FY 2022-23)		THIS YEAR (FY 2023-24) TAX RATE OPTIONS			
	\$	15.00	\$15.80	\$15.90	\$16.00	
TAX RATE	\$	15.00				
TAXABLE VALUATION	\$	1,061,314,380.00	\$ 1,071,991,940.00	\$ 1,071,991,940.00	\$ 1,071,991,940.00	
COUNTY	\$	817,347.00	\$ 974,325.00	\$ 974,325.00	\$ 974,325.00	
SCHOOL	\$	11,370,566.74	\$ 11,940,729.34	\$ 11,940,729.34	\$ 11,940,729.34	
TIF AMOUNT	\$	266,042.93	\$ 270,483.28	\$ 272,195.20	\$ 273,907.12	
MUNICIPAL	\$	3,406,942.82	\$ 3,711,906.50	\$ 3,810,043.02	\$ 3,908,179.53	
OVERLAY	\$	58,816.21	\$ 40,028.53	\$ 47,379.29	\$ 54,730.05	
TOTAL PROPERTY TAX	\$	15,919,715.70	\$ 16,937,472.65	\$ 17,044,671.85	\$ 17,151,871.04	
Each 1 cent increment on the tax rate will affect overlay by apprx \$10,900						
NON PROPERTY TAX REVENUES USED TO REDUCE MUNICIPAL APPROPRIATION						
	\$	15.00				
HOMESTEAD REIMB	\$	(242,958.60)	\$ (244,584.95)	\$ (246,132.95)	\$ (247,680.96)	
BETE REIMB	\$	(53,295.75)	\$ (49,845.84)	\$ (50,161.32)	\$ (50,476.80)	
STATE REV SHARING	\$	(505,081.83)	\$ (464,259.71)	\$ (464,259.71)	\$ (464,259.71)	
OTHER REVENUES	\$	(1,841,299.00)	\$ (2,015,400.00)	\$ (2,015,400.00)	\$ (2,015,400.00)	
SELECT BOARD USE OF FUND BALANCE	\$	(200,000.00)	\$ (200,000.00)	\$ (100,000.00)	\$ -	
MUNICIPAL APPROPRIATION	\$	6,249,578.00	\$ 6,685,997.00	\$ 6,685,997.00	\$ 6,685,997.00	
TOTAL NON TAX REV	\$	(2,842,635.18)	\$ (2,974,090.50)	\$ (2,875,953.98)	\$ (2,777,817.47)	
TOTAL MUNICIPAL TAX REV	\$	3,406,942.82	\$ 3,711,906.50	\$ 3,810,043.02	\$ 3,908,179.53	

The Board will be asked to select an amount of fund balance to apply towards the municipal budget and approve a tax rate at its September 12, 2023 meeting. Upon approval of the rate, the necessary warrants and certificates may be completed for signatures by the board members the next day. I will be available at the meeting to answer any follow up questions the board may have. --Curt Lebel

Post Issuance Compliance Policy

STATE OF MAINE TOWN OF RAYMOND POST ISSUANCE COMPLIANCE POLICY

The Town of Raymond (the “Town”) issues tax-exempt bonds, notes, leases, and other obligations (“Obligations”) from time to time to finance various capital improvements. As an issuer of such Obligations, the Town is required by the Internal Revenue Code of 1986, as amended, (the “Code”) and regulations promulgated by the United States Treasury Department to take certain actions subsequent to the issuance of such Obligations to ensure their continuing tax-exempt status.

The Town recognizes that compliance with applicable provisions of the Code and Treasury Regulations is an on-going process, necessary during the entire term of a bond issue, and is an integral component of the Town's overall debt-management responsibilities. These requirements apply equally to capital leases. Accordingly, the implementation of these requirements will require on-going monitoring and consultation with Bond Counsel.

Issuance:

The Select Board shall approve the terms and structure of Obligations issued by the Town. Such Obligations shall be issued in accordance with United States Treasury Department Regulations, the Internal Revenue Code of 1986, as amended, and State statutes. Specific post-issuance compliance procedures are addressed below.

General Procedures:

The following guidelines will be used to monitor compliance with post-issuance requirements:

1. The Town Treasurer, or the Treasurer's designee, shall serve as the Compliance Officer and shall be the person primarily responsible for ensuring that the Town successfully carries out its post issuance responsibilities. The Compliance Officer shall be assisted by the following persons or entities:
 - a. Bond Counsel
 - b. Financial Advisor
 - c. Paying Agent
 - d. Rebate Specialist

The Compliance Officer shall be responsible for assigning post-issuance responsibilities to other staff, Bond Counsel, the Financial Advisor, the Paying Agent, and the Rebate Specialist, and shall utilize such other professional services as are necessary to ensure compliance with all post-issuance requirements.

2. The Compliance Officer shall verify that the following post-issuance actions have been taken on behalf of the Town with respect to each issue of tax-exempt Obligations:
 - a. Ensure that a full and complete record for the principal documents of each issue has been completed by Bond Counsel and the Financial Advisor;
 - b. Ensure that the Internal Revenue Service (IRS) forms 8038 are properly filed with the IRS

by Bond Counsel within the time limits imposed by Section 149(c) of the Code;

- c. Account for the allocation of the proceeds of the tax-exempt Obligations to expenditures as required by the Code;
- d. Coordinate receipt and retention of relevant books and records with respect to the investment and expenditures of the issue proceeds;
- e. Identify proceeds of tax-exempt Obligations, in consultation with Bond Counsel and the Financial Advisor, that are yield-restricted and monitor the investments of any yield-restricted funds to ensure that the yield on such investments does not exceed the bond yield to which such investments are restricted;
- f. Determine, in consultation with Bond Counsel and the Financial Advisor, whether the Town is subject to the rebate requirements of Section 148(f) of the Code and related Treasury Regulations with respect to each issue of the Town.

The Compliance Officer shall contact a Rebate Specialist, as required, prior to the fifth anniversary of the date of issuance of each issue and each fifth anniversary thereafter until the obligation has matured to arrange for calculation of the rebate requirements, as needed, to be paid by the Town. If any rebate is required to be paid to the IRS, the Town Compliance Officer will file Form 8038-T, along with the required payment;

- g. Shall monitor the use of all financed facilities in order to determine whether private business uses of financed facilities have exceeded the de minimis limits set forth in Section 141(b) of the Code (generally a value or benefit equal to 10% of issue proceeds) that provide special legal entitlements to non-governmental persons; and
- h. Shall, with the assistance of professional services as needed, ensure that all nonqualified Obligations are remediated according to the requirements of the Code and relevant regulations.

3. The Compliance Officer shall collect and retain the following records with respect to each issue of tax-exempt Obligations and with respect to the facilities financed with the proceeds of such Obligations:

- a. Audited financial statements of the Town;
- b. Appraisals, surveys, feasibility studies, if any, with respect to the facilities to be financed with issue proceeds;
- c. Trustee or Paying Agent statements;
- d. Records of all investments and the gains (or losses) from such investments;
- e. Expenditures reimbursed with the issue proceeds;
- f. Allocation of Obligations proceeds to expenditures (including cost of issuance) and the dates and amounts of each expenditure (including requisitions, draw down schedules, invoices, bills, and canceled checks as related to each expenditure);
- g. Construction or renovation contracts for financed facilities or projects;
- h. Maintain an asset list of all tax-exempt financed depreciable property and sales of tax-exempt financed assets;
- i. Arbitrage rebate reports and records of rebate and yield reduction payments, if any;

- j. Orders, Resolutions, and other actions, if any, adopted by the Town subsequent to the date of issue of the Obligations; and
- k. Relevant correspondence relating to such Obligations.

The records collected by the Town shall be stored in any format deemed appropriate by the Compliance Officer and shall be retained for a period equal to the life of the tax-exempt obligations, including the life of any obligations issued to refund obligations, plus three (3) years.

- 4. Prior to the change in use, sale, lease, or rent of any bond-financed asset, the Compliance Officer shall be consulted in order to ensure compliance with applicable Code provisions and Treasury Regulations. In the event that an action is found to cause an issue to meet the private business tests or the private loan financing tests, the Compliance Officer and other necessary Town officials, in consultation with Bond Counsel, may undertake the remedial action steps listed in 26 C.F.R. § 1.141-12.
- 5. In the event of a violation of the applicable rules for tax-exempt Obligations, the Compliance Officer, and other necessary Town officials, in consultation with Bond Counsel, may participate in the Tax-Exempt Bonds Voluntary Closing Agreement Program in order to conclusively resolve the violation as expeditiously as possible.
- 6. In addition to its post-issuance compliance requirements under the Code and Treasury Regulations, the Town has agreed to provide Continuing Disclosure, such as annual financial and operating data and event notices (“Continuing Disclosure Documents”) as required pursuant to law, regulation, and/or such Continuing Disclosure Agreements (“CDAs”) into which the Town may enter. The Town has also agreed to file such Continuing Disclosure Documents with the Municipal Securities Rulemaking Board (“MSRB”) through the Electronic Municipal Market Access System (“EMMA”). The continuing disclosure obligations are governed by the CDAs, the Continuing Disclosure Documents, and by the terms of Rule 15c2-12 under the Securities and Exchange Act of 1934, as amended and officially interpreted from time to time. Among its Continuing Disclosure obligations, the Town shall undertake the following:
 - a. In connection with the offering by the Town of any securities for sale on the public market, the Compliance Officer, with assistance from such other officers, employees, and agents of the Town as necessary, shall review any relevant offering documents, including but not limited to: preliminary official statements, final official statements, or investor presentations (“Offering Documents”), to ensure the material facts in the Offering Documents appear to be consistent with those known to the Town; and Offering Documents do not omit any material facts necessary to be included to prevent the Offering Documents from being misleading to investors;
 - b. Prior to posting of a final official statement, the Town Board of Selectmen will review the same and only after their authorization shall the final official statement be posted;
 - c. The Compliance Officer, with assistance from such other officers, employees, and agents of the Town as necessary, shall be informed of and review financial information and operating data to be filed with the MSRB pursuant to the CDAs, including, but not limited to, annual audited financial information and annual operating data (the “Annual Filing”),

- as identified in documents offering the Town’s security obligations for sale;
- d. The Compliance Officer shall file the Annual Filing with the MSRB through EMMA by the deadline established by law, regulation, and/or the CDAs;
 - e. The Compliance Officer shall maintain a list of events, which if material to investors, the Town is required to provide notice of to the MSRB pursuant to law, regulation, and/or the CDAs (“Disclosure Event(s)”). Such Disclosure Events include, but are not limited to, failure to provide annual financial information on or before the date agreed to by the Town; principal and interest payment delinquencies; non-payment related defaults; unscheduled draws on debt service; reserves reflecting financial difficulties; unscheduled draws on credit enhancements reflecting financial difficulties; substitution of credit or liquidity providers, or their failure to perform; adverse tax opinions or events affecting the tax status of the security; modifications to rights of security holders; bond calls and tender offers; defeasances; release, substitution or sale of property securing repayment of the securities; rating changes; bankruptcy, insolvency or receivership; merger, acquisition or sale of all issuer assets; appointment of successor trustee; or incurrence of a material financial obligation;
 - f. Upon the occurrence of a Disclosure Event the Compliance Officer shall involve such other officers, employees, and agents of the Town as necessary and shall: (1) assess the materiality of any Disclosure Event with the assistance of legal counsel and, if notice of the event must be given; (b) prepare an Event Notice giving notice of the event and file the same with EMMA;
 - g. The Compliance Officer shall periodically review the Town’s websites to ensure that: (a) material third-party information is not linked or referred to without appropriate disclaimers, is not hyperlinked, and is not included unless the Compliance Officer has reason to believe that it is reliable, and identifies the source of the information; (b) dated material information is removed from the websites or moved to a clearly labeled archives page; (c) all material financial and operating data is presented as of a specific date with appropriate disclaimers as to the currency of the data; (d) no material forward-looking statements (projections, forecasts, etc.) are included unless they are based on reasonable assumptions and are accompanied by a description of the substantial risks to achieving the forecasted results; and (e) the material information presented is consistent with the knowledge of such persons and not internally inconsistent; and
 - h. The Compliance Officer shall undertake periodic disclosure training, which shall address the requirements of federal and state securities laws and the CDAs, the meaning of “material,” and the duties of such officers, employees, and agents under this Policy.

Given unto our hands on the 12th day of September, 2023:

Joseph Bruno, Chair

Samuel Gifford

Rolf Olsen, Vice-Chair

Derek Ray

Teresa Sadak

Post Issuance Compliance Policy

4

Revised September 12, 2023

General Assistance - Jennie's Report

I had 22 applicants during the fiscal year July 2022- June 2023. Three applicants were found ineligible. Two applicants were homeless and helped. The rest of the applicants, I approved of for the following:

Housing:	14943.00
Heat:	6013.96
Electricity:	3879.33
Food:	3974.34
Household and Personal Items:	<u>320.27</u>
Total:	29130.90

The town of Raymond pays 30% and the state reimburses us 70%.

Total the town paid is 8739.27.

General Assistance Ordinance Summary Sheet of Changes

2023-2024 GA MAXIMUMS SUMMARY SHEET

Note: The overall maximums found in *Appendices A, B, C, D, E, and F* are effective from **October 1, 2023 to September 30, 2024.**

APPENDIX A - OVERALL MAXIMUMS

<u>County</u>	<u>Persons in Household</u>					
	1	2	3	4	5	6
NOTE: For each additional person add \$75 per month.						
(The applicable figures from Appendix A, <i>once adopted</i>, should be inserted here.)						

APPENDIX B - FOOD MAXIMUMS

<u>Number in Household</u>	<u>Weekly Maximum</u>	<u>Monthly Maximum</u>
1	\$ 67.67	\$ 291.00
2	124.42	535.00
3	178.14	766.00
4	226.28	973.00
5	268.60	1,155.00
6	322.33	1,386.00
7	356.28	1,532.00
8	407.21	1,751.00
NOTE: For each additional person add \$219 per month.		

APPENDIX C - HOUSING MAXIMUMS

<u>Number of Bedrooms</u>	<u>Unheated</u>		<u>Heated</u>	
	<u>Weekly</u>	<u>Monthly</u>	<u>Weekly</u>	<u>Monthly</u>
0				
1				
2				
3				
4				
(The applicable figures from Appendix C, <i>once adopted</i>, should be inserted here.)				

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1

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APPENDIX D - UTILITIES

ELECTRIC

NOTE: For an electrically heated dwelling also see “Heating Fuel” maximums below. But remember, an applicant is ***not automatically*** entitled to the “maximums” established—applicants must demonstrate need.

1) **Electricity Maximums for Households Without Electric Hot Water:** The maximum amounts allowed for utilities, for lights, cooking and other electric uses ***excluding*** electric hot water and heat:

<u>Number in Household</u>	<u>Weekly</u>	<u>Monthly</u>
1	\$19.95	\$ 85.50
2	\$22.52	\$ 96.50
3	\$24.97	\$107.00
4	\$27.53	\$118.00
5	\$29.88	\$128.50
6	\$32.55	\$139.50

NOTE: For each additional person add \$10.50 per month.

2) **Electricity Maximums for Households With Electrically Heated Hot Water:** The maximum amounts allowed for utilities, hot water, for lights, cooking and other electric uses ***excluding*** heat:

<u>Number in Household</u>	<u>Weekly</u>	<u>Monthly</u>
1	\$29.63	\$127.00
2	\$34.07	\$146.00
3	\$39.67	\$170.00
4	\$46.32	\$198.50
5	\$55.65	\$238.50
6	\$58.68	\$251.50

NOTE: For each additional person add \$14.50 per month.

NOTE: For electrically heated households, the maximum amount allowed for electrical utilities per month shall be the sum of the appropriate maximum amount under this subsection and the appropriate maximum for heating fuel as provided below.

APPENDIX E - HEATING FUEL

<u>Month</u>	<u>Gallons</u>	<u>Month</u>	<u>Gallons</u>
September	50	January	225
October	100	February	225
November	200	March	125
December	200	April	125
		May	50

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2

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08/23

NOTE: When the dwelling unit is heated electrically, the maximum amount allowed for heating purposes will be calculated by multiplying the number of gallons of fuel allowed for that month by the current price per gallon. When fuels such as wood, coal and/or natural gas are used for heating purposes, they will be budgeted at actual rates, if they are reasonable. No eligible applicant shall be considered to need more than 7 tons of coal per year, 8 cords of wood per year, 126,000 cubic feet of natural gas per year, or 1000 gallons of propane.

APPENDIX F - PERSONAL CARE & HOUSEHOLD SUPPLIES

<u>Number in Household</u>	<u>Weekly Amount</u>	<u>Monthly Amount</u>
1-2	\$10.50	\$45.00
3-4	\$11.60	\$50.00
5-6	\$12.80	\$55.00
7-8	\$14.00	\$60.00

NOTE: For each additional person add \$1.25 per week or \$5.00 per month.

SUPPLEMENT FOR HOUSEHOLDS WITH CHILDREN UNDER 5

When an applicant can verify expenditures for the following items, a special supplement will be budgeted as necessary for households with children under 5 years of age for items such as cloth or disposable diapers, laundry powder, oil, shampoo, and ointment up to the following amounts:

<u>Number of Children</u>	<u>Weekly Amount</u>	<u>Monthly Amount</u>
1	\$12.80	\$55.00
2	\$17.40	\$75.00
3	\$23.30	\$100.00
4	\$27.90	\$120.00

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3

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