



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

Request for Proposals Personal Property Revaluation Project

PROJECT SUMMARY

In conjunction with an already contracted real property revaluation, the Town of Raymond seeks competitive proposals for a complete revaluation of all taxable and tax-exempt 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 Towns 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 Towns local server system. This system is utilized for the valuation of both real and personal estates. VGSI also serves as the web host of Raymonds assessment data online.

There are currently 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.

1.0 PROJECT SCOPE

The scope of the project (Revaluation Project or Project) requires the complete discovery and appraisal of all taxable personal property and all (BETE) 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, except as otherwise specified and shall perform all work for the Project in strict accordance with the project scope, section 5 and appendix A of 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 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 dependent upon market conditions at the time of the effective date of the project.

2.0 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 Personal Property Revaluation
- ii. Effective date of proposed Project, with rationale for proposed effective date
- iii. Time schedule filled out according to the Revaluation Schedule
- iv. Staged fee payments filled out according to the Revaluation Schedule
- v. 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–PERSONAL PROPERTY 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, March 13, 2024 4 PM EST |
| Proposal/Bid Opening | Thursday, March 14, 2024 |
| Proposal Evaluations/Selection of Company | Tuesday, May 14, 2024 |
| Execution of Contract by Company | Thursday, June 13, 2024 |
| 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 March 13, 2024**. Proposals shall be opened publicly at 10:00 am on Thursday, March 14, 2024.

3.0 FINAL SELECTION EVALUATION CRITERIA

The 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 similar to 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 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 **May 31, 2024**, the Town will notify the selected Company that it has been selected.

4.0 GENERAL CONTRACT CONDITIONS

On or before **June 30, 2024**, 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 (15%) percent retainage through conclusion of the local appeal process.

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 of \$500 per day.

- a) All account assets entered into the Towns CAMA system for valuation.
- b) All completed assessments and BETE applications delivered to Assessors Agent/Board of Assessors for approval.
- 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 Office in accordance with the General Contract Conditions

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.

5.0 RESPONSIBILITIES OF REVALUATION COMPANY

The Company's Project Manager and Assessor shall regularly discuss the progress and various other details of the Project. These discussions may be scheduled to occur more frequently if they are found to be necessary by the 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. Any data collection and valuation manuals used in maintaining and updating values.
4. Source information used in the development of depreciation schedules utilized.
5. Property Declarations filed by taxpayers listing equipment.
6. Digital photos of all recreational vehicles assessed as personal property.
7. Field review documents reflecting preliminary values, adjusted preliminary values, and any notes relative to informal review actions.
8. 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.
9. Valuation list of new values
10. All documents shall be delivered as digital files, unless otherwise specified by the Assessor.
11. 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 Assessors in conducting a public information program. All public information releases shall be approved by the Assessor prior to release. The Company shall submit a detailed public relations plan to the Town with its proposal.

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 Assessor.

Inspections: Properties containing business equipment shall be inspected and equipment identified and listed.

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 Assessor in electronic form (i.e. pdf) and arranged in map/lot sequence.

Further, the notices shall include information specifying the dates, times, and place of the informal hearings. Such notices and information shall be subject to approval by the Town. Prior to sending notices, the Company shall memorialize the proposed new values in the CAMA's Assessment History section as Interim values.

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 Assessor.

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

The Company agrees that the Project Manager or Field Appraiser of the 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

The appraisal company shall, through discovery procedures outlined by the company in its response to this RFP, ascertain the valuation of taxable and potentially exempt (BETE) personal property. Depreciation schedules for property types shall be developed in accordance with industry standards.

The appraisal company shall provide a brief description of all personal property appraised. The company shall appraise 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. 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 selectmen/assessor(s) 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

CAMA Database & CAMA Software: The Assessor will make available to the Company the current CAMA database, which includes current accounts and DBA filings to assist in identify new accounts.

Introduction: The Board of Assessors and/or Assessors Agent shall furnish letters of introduction and authority to inspect business for personal property in the Town.

Mailing Address: The Town shall furnish through the Assessor'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 Assessors Agent may, from time to time, accompany listers/appraisers on property visits.

APPENDIX C – DEFINITIONS

Assessor/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, 2026

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 personal property and all tax-exempt personal 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