

**REQUEST FOR PROPOSALS  
FOR REVALUATION SERVICES  
LAKE VIEW PLANTATION, MAINE**

Lake View Plantation, Maine seeks proposals from qualified Contractors to revalue all real estate and personal property in the Town, effective April 1, 2024. Contractors interested in providing the revaluation services are invited to submit a copy of their proposal to the Lake View Plantation Town Office no later than 2:00 PM, June 2, 2023. Proposals will be awarded at the Monthly Assessor's Meeting on June 8, 2023 at 6:00pm. Any questions can be emailed to the Town Tax Collector/Treasurer, Cheryl Gormley at [lakeviewplantation@myfairpoint.net](mailto:lakeviewplantation@myfairpoint.net)

**PROPOSAL  
FOR REVALUATION SERVICES  
LAKE VIEW PLANTATION, MAINE**

All proposals shall be addressed to: Lake View Plantation, P.O. Box 708, Brownville, ME 04414. All bids shall be in writing and placed within a sealed envelope marked "Lake View Plantation Revaluation Bid" and mailed or delivered to the Town Office by 2 pm on June 2, 2023.

All information pertaining to the Contractor's technical and managerial approach to completing this project, as well as the proposed price and timetable, shall be presented in the proposal. The proposal must address, at a minimum, each of the issues set forth in the Request for Proposal in order to be considered responsive.

Lake View Plantation reserves the right to amend this request for proposals for revaluation services, and the other services describes, at any time prior to the deadline for submission for proposals and to reject any or all proposals received if it determines it to be in its best interest to do so.

Lake View Plantation real estate assessment currently utilizes the TRIO software system. TRIO Real Estate software will be loaded with all assessment data before the revaluation is completed. All water front will be valued per front foot and depth, all other land by base lot valuation. All data entry including pictures and sketches into TRIO Real Estate shall be the responsibility of the Contractor. The Contractor shall propose a solution to complete the project without unduly impacting the day-today operations of the Town Office.

Lake View Plantation personal property assessment is currently calculated by hand and entered into TRIO. All assessment data shall be loaded into the software. The Contractor shall propose a solution to complete the project without unduly impacting the day-today operations of the Town Office.

In addition to addressing each item in the specifications, the Contractor must submit, as part of its proposal, the following information:

1. A Letter of Transmittal signed by the individual authorized to negotiate for and contractually bind the Contractor.
2. Reference Lists.
3. Resume(s), of key personnel responsible for the project.
4. A List of revaluation contracts for which the Contractor is currently committed, or has completed.
5. Description of the Contractor's public relations program that would be used during the revaluation process.

### **SUMMARY**

Service	Total Price
Revaluation of all real property	\$ _____
Revaluation of all personal property	\$ _____

The above price is to be considered separate, unbundled amounts. Lake View Plantation reserves the right to select or reject any price, whichever arrangement is believes best serves its interests. The revaluation of real and personal property is to include, data, loaded and operational in the town's computer.

Bids shall include the following information.

1. Name and telephone number of person(s) to be contacted for further information or clarification.
2. Reference List.
3. Name of project supervisor to be assigned to this project, along with his/her resume.
4. Time schedule filled out according to Contract Specification
5. Staged fee payments filled out according to the Contract Specification
6. Rate per parcel for each property in excess of the current number identified in Contract Specifications.

### **CONTRACT SPECIFICATIONS**

#### **SCOPE OF THE REVALUATION PROJECT**

- A. The revaluation PROJECT requires the complete revaluation of all taxable real and personal property, and all tax-exempt real property located within the corporate limits of Lake View Plantation, Maine.
- B. Contractor shall furnish all labor, materials, supplies and equipment, and shall perform all work for the project in strict conformity with these contract specifications.

- C. The scope of the PROJECT shall be subject to the approval of the Plantation. The Plantation Board of Assessors shall have final approval of personnel, forms, records, and materials utilized in this PROJECT. The PROJECT shall conform to the Standards and Qualifications defined in Rules of the Maine Revenue Service.
- D. The values to be determined shall be just value (market value) as these terms are defined in Maine Statutes and Maine Supreme Court decisions. Basis of valuation shall be the recognized methods of appraising real property, as defined by the Appraisal Institute and International Association of Assessing Officers (IAAO), and as set forth in the Uniform Standards of Professional Appraisal Practice promulgated by the Appraisal Standards Board of the Appraisal Foundation.
- E. The PROJECT shall include the valuation of the following categories of property within the Town:
1. All taxable real property, including land, buildings and all other types and classes of land improvements.
  2. All tax-exempt property. The Contractor shall recommend exempt statuses but decisions regarding the exempt status of such property shall be made by the Plantation.
  3. The just value appraisal of each taxable personal property account with itemized lists separately expressed values for furniture and fixtures, machinery and equipment.
- F. The effective date of this revaluation PROJECT shall be April 1, 2024.
- G. The approximate number of land parcels as of April 1, 2023 is as follows:  
Taxable and Tax-Exempt parcels: approximately 554 total parcels according to TRIO. A full time resident population of 153. The approximate number of personal property records is 2.
- H. Pertinent Town Data:
- a. Last completed Land and Building revaluation was prior to 2007.
  - b. Estimated Population as of the 2020 census is 150.
  - c. The total area within the Plantation's corporate boundaries is roughly 53 square miles.
  - d. Estimated number of LUPC building permits 20 per year including 1 new dwelling, more or less.

## **GENERAL CONDITIONS**

### **A. PROJECT AWARD**

Lake View Plantation, Maine reserves the right to reject any part of, or all of each bid proposal; to waive informalities and technicalities; and, to accept that proposal or portion of a proposal which the Plantation in its sole, exclusive judgment deems to be in its best interest. Proposal price shall be a consideration, but lowest price shall not be the sole criterion on which the award shall be based. Consideration shall also be given to the background and experience of the Contractor, the training and experience of its personnel, and its record of achievement.

### **B. COMPANY**

#### **1. CERTIFICATION**

Each prospective Contractor must hold, a written certification (CMA) by the Maine Department of Revenue Services from the time of submission of the proposal issued through the satisfactory completion of all work required herein.

#### **2. Proposal**

Each Proposal submitted shall itemize the perspective Contractor's qualifications and experience. The Contractor shall submit a list of references.

### **C. PERSONNEL** Contractor shall provide experienced and qualified personnel employed by it in accordance with the Equal Employment Opportunity provisions of federal and state governments. Contractor shall submit to the Plantation written qualifications of all personnel assigned to this project in the form of a detailed, written resume. All personnel assigned to this project shall be subject to the approval of the Plantation and shall be removed from this project by the Contractor upon written request of the Plantation.

1. **Office Space, Hours, and Staffing.** The Plantation shall furnish to the Contractor with sufficient office space necessary office furniture, access to telephones and copier equipment to carry out the terms of this contract. Contractor shall be responsible for all associate telephone and copier charges and expenses. Contractor shall notify the Plantation of the names of Contractor's representatives, supervisor, and staff that will be working on the project.

2. **Minimum Qualifications.** The Contractor shall employ qualified personnel to perform the work required in this project. Personnel shall, at a minimum, possess the minimum qualifications and professional designations established by the Maine Revenue Service, i.e., Certified Maine Assessor (CMA).

3. **Identification.** All Contractor Personnel shall carry suitable ID cards, which will include up-to-date photograph.

4. **Conflict of Interest.** No resident or Plantation employee shall be employed by the Contractor on this project without express written consent of the Lake View Plantation Board of Assessors.

## D. PROTECTION OF THE PLANTATION

### 1. Indemnification and insurance

- i. The Contractor agrees to defend and indemnify the Plantation against claims for bodily injury, accidental death, and property damage, which may arise in the course of the Contractor's performance of the contract, and, all other respects, to hold the Plantation harmless from both inadvertent and negligent acts of the Contractor, its employees, and agents.
- ii. The Contractor 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.
- iii. The Contractor shall maintain automobile liability insurance and any workmen's compensation insurance required for personnel.

### 2. Failure of the Contractor to complete all work prior to April 1, 2024 shall be cause for a payment by the Contractor to the Plantation of Two Hundred Dollars (\$200.00) per calendar day from that date until satisfactory completion of all work. For the purpose of identifying such payments as liquidated damages only, completion of all work is defined to include:

- i. Completed data collection cards with all measurements and listings.
- ii. Completed review documents.
- iii. Completed hearings and hearing corrections.
- iv. Completed sales ratio analyses.
- v. Completed final valuations and total work product tested, reviewed, and delivered.
- vi. TRIO Real Estate data including pictures and sketches, loaded onto Plantation's office computer and fully operational.
- vii. Cards printed and delivered to the Town Office.

Liquidated damages, if applied, shall be deducted from the contract price to the extent there is sufficient undisbursed funds remaining in the contract, exclusive of the retainage, otherwise they will be paid by the Contractor from other sources. Delays occasioned by acts of God, order of court of competent jurisdiction, or force majeure are exempted.

## E. COMPLETION DATE AND TIME SCHEDULE

### 1. Changes and subletting of contract.

- i. Revisions, Modifications, and Subletting. The Contractor shall not change, modify, assign, transfer, delegate or sublet the Contract or any interest or part thereof without first receiving written approval from the Plantation and Maine Revenue Services. It shall be mutually agreed and understood that consent by the Plantation shall not release the Contractor from any contractual responsibility or liability.

### 2. Time Schedule

- i. Revaluation work shall start in the plantation no later than thirty (30) days after signing the contract.
- ii. All corrected and finalized appraisal cards shall be completed and turned over to the Plantation no later than April 30, 2024 at which time TRIO Real Estate data shall be fully loaded, tested, and operational on the Plantation's office computer system.
- iii. Assessment Date. The completed appraisals, upon approval of the Plantation Assessors, will be the basis for the municipal property Assessment effective April 1, 2024. All data contained on the appraisal cards, and in the TRIO Real Estate system shall reflect an assessment date of April 1, 2024.

F. PAYMENT SCHEDULE. Payment schedules will be delineated within Bid Proposal and contract. Ten percent (10%) of the total contract price will be withheld until such time as the Plantation's Board of Assessors determines that the Contractor has fully and satisfactory completed all of its obligations and requirements under the contract.