

KRT Appraisal

191 Merrimack St, Suite 701

Haverhill, MA 01830

Tel (877) 337-5574

Fax (978) 914-7201

September 24, 2019

Dan Kooken
Purchasing Manager
229 Main Street
Nashua, NH 03061

Price Proposal

Dear Mr. Kooken:

KRT Appraisal (KRT) is pleased to submit a price proposal in response to your Request for Proposals (RFP), for a Full Measure and List Appraisal and Revaluation (Cyclical Revaluation) for the City of Nashua, New Hampshire. KRT will provide all services outlined in the RFP while conforming to all New Hampshire State Laws.

Based on the current parcel count (28,559), the total cost for a Cyclical Revaluation is One Million Four Hundred Thousand Dollars (**\$1,400,000**). This includes all of the services described in KRT's Statement of Services submitted within the Non-Price Proposal with all products delivered by September 1, 2022. If requested, the cost to defend assessment appeals through the abatement process or formally at the BTLA or Superior Court after the Cyclical Revaluation is One Hundred Dollars per Hour (**\$100.00/Hour**).

KRT looks 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 A. Tozier
Vice President
KRT Appraisal
rob_tozier@krtappraisal.com
www.krtappraisal.com

City of Nashua, New Hampshire



Nashua
NEW HAMPSHIRE'S GATE CITY

**Proposal for Full Measure
Appraisal and List and
Revaluation**

KRT Appraisal

 ORIGINAL

City of Nashua, New Hampshire

Proposal for Full Measure and List Appraisal and Revaluation

KRT Appraisal

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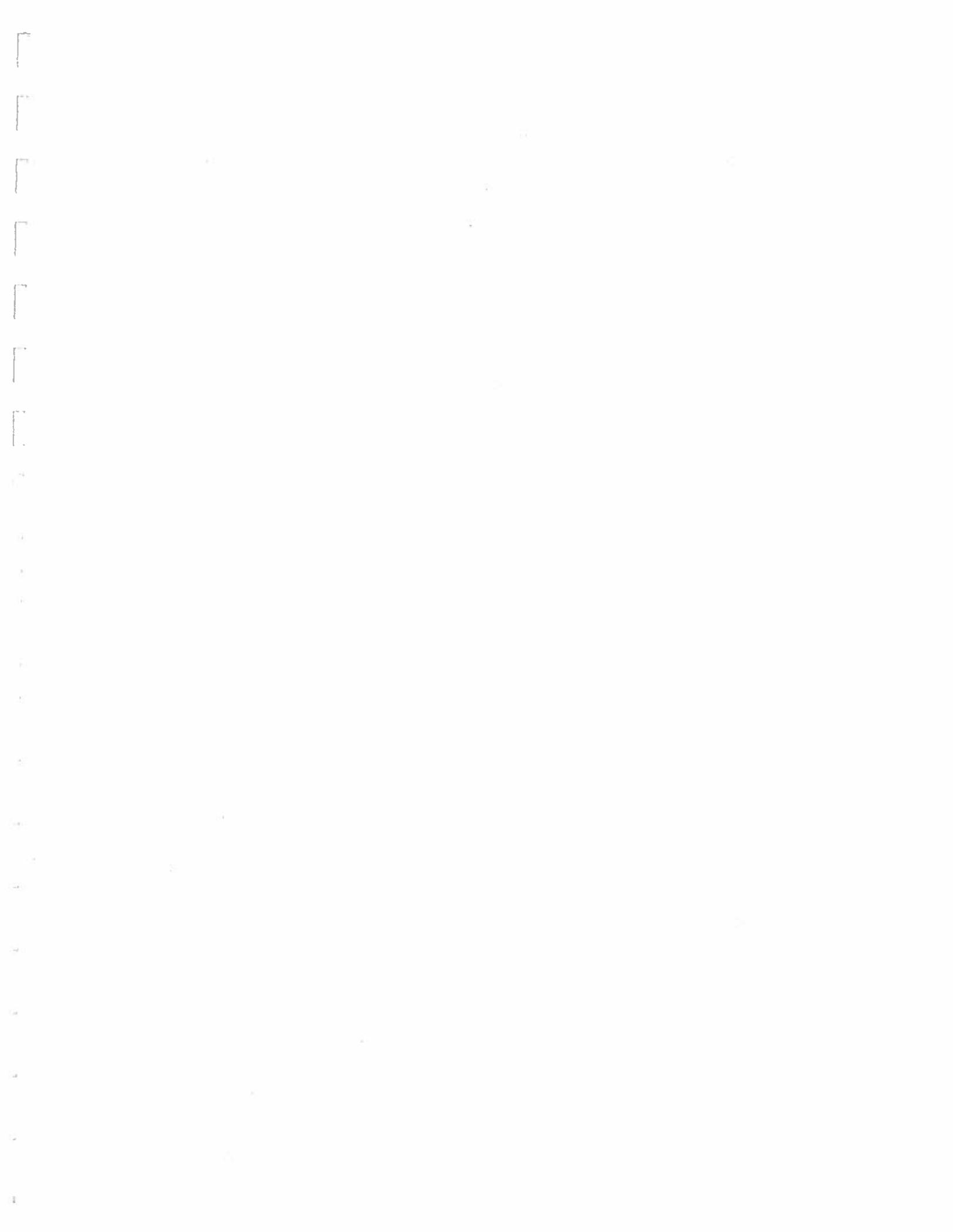


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THE CITY OF NASHUA

*Administrative Services
Purchasing Department*

"The Gate City"

September 11, 2019

**RFP0023-092619
FULL MEASURE AND LIST APPRAISAL & REVALUATION FOR THE CITY OF NASHUA, NH
ADDENDUM #1**

Information included in this document becomes a part of the original RFP.

If you are submitting a paper bid, please sign below to indicate receipt of this additional information and include this page with your bid submittal. If you are submitting a bid via Bid Express please be sure to acknowledge the addendum on the website before submitting your bid.

ADDENDUM 1 is being issued to respond to submitted questions.

All other aspects of the original document remain the same.

Failure to acknowledge the addendum will result in the bid submittal being disqualified.

Sincerely,

Dan Kookan
City of Nashua – Purchasing Manager
kookend@nashuanh.gov

Addendum #1 received and incorporated into bid submittal for RFP0023-092619.

Please sign and include this addendum in your bid package.

(Authorized Signature)

9/24/19

(Date)

KRT Appraisal

(Name of Firm)

Questions and Answers for Bid RFP0023-092619

Full Measure and List Appraisal & Revaluation for the City of Nashua, NH

- Number of building permits for the last two years requiring inspections?

A total of 2957.

- How many years of Income & Expense Statement will we require?

At least two years will be required.

- What manual does the RFP reference?

A procedure manual to identify how data was collected.

- Total number of parcels (page 4)?

The total should be 28,559 (which is less the 59 utilities).

- Will images of out buildings be required?

Images of sheds will not be required but larger out buildings, such as pool houses, detached garages, accessory dwelling units and carriage houses should be included.

- Will the city accept items for the monthly newsletter?

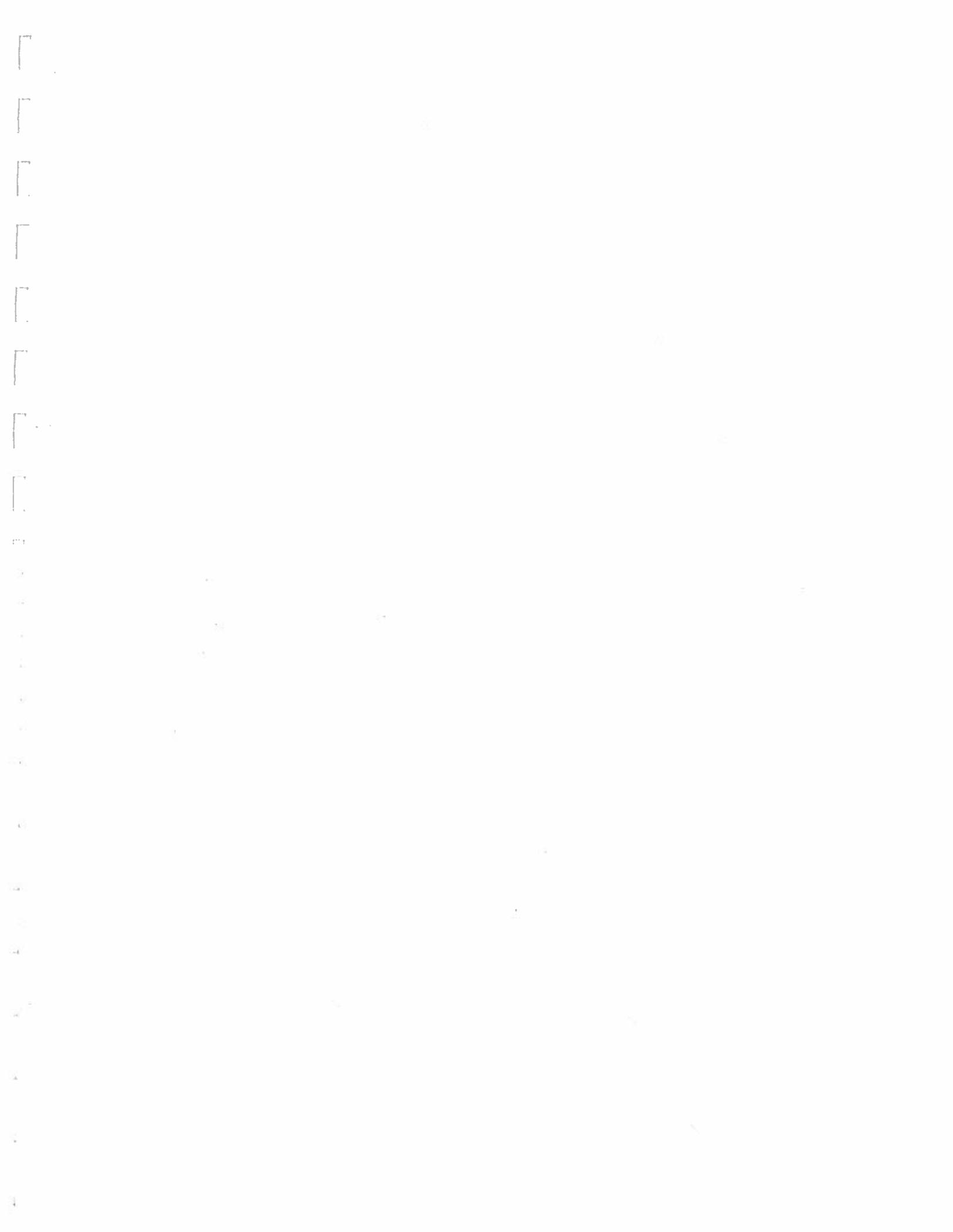
Yes, the city will review and consider any items for the newsletter or communications to our residents.

- Will the city consider proposals with a shorter completion timeframe?

Yes, the city will consider all alternatives presented in considering what is in best interest of Nashua.

- How many attempts will the city require for inspection of each property?

At the minimum, the city will require: the initial visit, leaving of notification card, follow up letter mailed by USPS, and any resulting follow up visit. See page 8, 3.1.3.



September 24, 2019

Dan Kooken
Purchasing Manager
229 Main Street
Nashua, NH 03061

Letter of Transmittal

Dear Mr. Kooken:

The following report is submitted in response to your Request for Proposals for a Full Measure and List Appraisal and Revaluation (Cyclical Revaluation), for the City of Nashua, New Hampshire. This proposal will serve to provide the City with our qualifications and experience in providing similar services in the past. KRT Appraisal (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 and oversight of the data collection. Our experience, familiarity with the AssessPro CAMA System and prior successful work history with the City make KRT an excellent candidate to complete the Cyclical 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 A. Tozier
Vice President
KRT Appraisal
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www.krtappraisal.com

Why Hire KRT?

KRT is uniquely qualified to complete the Cyclical Revaluation. This is in large part due to the prior experience gained during the 2018 Statistical Update and understanding the areas that need to be addressed as part of this next project. KRT would like to highlight three areas of focus that would make for a successful project.

Maximizing Entry Rate

The goal for this phase of the project is to get an entry rate that surpasses 50%. Historically, KRT has averaged a 20% entry rate on the initial visit. To bridge the gap, KRT will implement a rigorous call-back program that is three tiered. First, if KRT is unable to perform an interior inspection during the initial visit, KRT will leave a door hanger requesting the property owner call KRT to schedule an interior inspection. This will be followed up with a second attempt at an interior inspection on the same day as the initial visit. KRT will drive by each property a second time and knock on doors where it appears that someone may be home. Finally, at the end of the project, KRT will send a letter to everyone where an interior inspection has still not been completed requesting a phone call for an appointment. These three efforts will give KRT the best chance to get an entry rate above 50%.

EYB Fix

KRT understands the City's goal to eliminate the overall use of the subjective EYB by creating tables that run off the condition code. Each home will be assigned an EYB from a matrix so that every home in the City built in the same year will have the same EYB. This will allow for the depreciation to be calculated using a condition code that will also be set up through the tables. This will remove most of the subjectivity and allow for a more consistent application of depreciation.

Timeframe

The timeframe has come under question as part of the RFP process. KRT had suggested completing this project over three years rather than trying to get it all done for 2021. KRT still believes that a three year timeframe is the best way to complete the project. This is mostly due to the City's wish to maximize the entry rate as described above. Trying to complete this project for 2021 would not leave any time for an effective callback program. Data collection will need to be completed in about a year, or by January 1, 2021. To complete all parcels by this date would require six data collectors. This could compromise the quality of the data collection. KRT believes that fewer boots on the ground allows for data to be collected more consistently and reduce human error. Callbacks will take at least four months. If either the data collection or callbacks take longer than expected, the success of the valuation portion will be in jeopardy.

These reasons, coupled with KRT's work history with the City of Nashua, make KRT the most qualified candidate for successful project completion.



EXECUTIVE SUMMARY **CYCLICAL REVALUATION**

KRT has read the RFP and fully understands the services requested for the Cyclical Revaluation Program for the City of Nashua, New Hampshire. Below is a brief list of services to be provided:

- Hold a start up meeting with the Assessor's Office and DRA Monitor;
- Measure and List all properties in the City over two and a half years ending March 31, 2022;
- Leave a door hanger requesting a phone call for an interior inspection;
- Mail a first class letter to all owners of properties where we were unable to perform an interior inspection and complete callback appointments;
- Update the photo for all improved properties;
- Verify building permits as requested for the duration of the contract;
- Provide data entry at each step of the Cyclical Revaluation;
- Analyze all of the qualified sales for the time period of at least one (1) year prior to the assessment date of April 1, 2022;
- Update all land and building tables as dictated by sales analysis;
- Review one hundred percent (100%) of the properties in the field;
- Mail property owners a notice of valuation with info on the hearing process;
- Conduct the informal hearings and consider all credible information provided;
- KRT shall implement a public relations program designed to educate City Officials, Assessing Office, and general public on the phases of the Cyclical Revaluation as well as the valuation results from the market analysis;
- Submit to the City and the Department of Revenue Administration (DRA) a full Uniform Standards of Professional Appraisal Practice (USPAP) compliant report detailing the results from the Revaluation.

KRT offers a variety of mass appraisal, consulting, and assessing services to its clients. Some of these services include:

- Data Collection
- Digital Imaging
- Building Permit Review
- Consulting
- Abatement Review
- Full Revaluations
- Statistical Updates
- Contract Assessing

KRT has hands-on experience using the AssessPro CAMA System. KRT has complete over fifty revaluations since its inception in 2010.



Bid Exceptions

1. KRT has been in business for almost ten years, and to this point, has never needed a bond, despite completing over fifty Revaluations. As a partnership, the principle owners of KRT do not have enough equity to use as collateral to secure a bond of this magnitude. Therefore, KRT will not be providing a performance bond for this project. The cost savings of the bond has been passed along to the City in our bid price. In-leiu of a performance bond, KRT Appraisal requests the City hold an additional ten percent (10%) retainage, for a total of twenty percent (20%). KRT requests the retainage to be released in the following manner:
 - a. Five percent (5%) on or about January 1, 2021 when the data collection is halfway complete;
 - b. Five Percent (5%) on or about May 1, 2022 once the data dollection and callbacks are complete;
 - c. Eight percent (8%) once final notices have been mailed from the informal hearings, and;
 - d. Two percent (2%) once the compliant Cyclical Revaluation USPAP manual has been received by the City.



STATEMENT OF SERVICES CYCLICAL REVALUATION

1) PROFILE OF NASHUA, NH

1.1: Nashua covers approximately 31.9 square miles and is located in Hillsborough County, New Hampshire with a population of approximately 86,494. Built around the now-departed textile industry, in recent decades it has been swept up in southern New Hampshire's economic expansion as part of the Boston region. Nashua was twice named "Best Place to Live in America" in annual surveys by *Money* magazine. It is the only city to get the No. 1 ranking on two occasions—in 1987 and 1998. Nashua includes a total of 28,559 parcels covered under the scope of this project, excluding utilities.

2) SCOPE OF THE PROJECT

2.1: Subject to the terms and conditions of this Statement of Services, KRT will measure, list and update the values for all classes of property located within the City of Nashua as identified in Section 1 while conforming to all applicable RSA's consistent with the Assessing Standards Board and the Assessing Equalization Standards Board requirements for equitable assessments. The determined value will reflect full market value as of April 1, 2022.

2.2: KRT shall, in good faith, use its best efforts to assist the City in determining accurate and proper market valuations, and will work closely with all City Officials and the NH Department of Revenue to ensure a successful Cyclical Revaluation.

2.3: For purposes of this proposal, the scope will be divided into four (4) main groups of project requirements, each extensively detailed. The four (4) main groups are as follows: Data Collection, Analysis, Field Review, and Informal Hearings/Reporting.

A) Data Collection

2.A.1: KRT will conduct an on-site exterior measurement and interior inspection of all properties over a two and a half (2.5) year period commencing in December of 2019 and completed by April 30, 2022. All KRT employees will have proper identification (KRT Badge or City ID) as well as a letter from the City with a vehicle description and purpose for visiting the property.

2.A.2: KRT will verify all of the information on the property record card. This includes all construction detail, sketch measurements, year built, property condition, yard items/extra features, sale conditions, and land detail information. The EYB code will be table driven and the condition code will be the factor for determining the overall depreciation. A visit

history code with the employee's initials and date will be added for each visit to the property.

2.A.3: KRT will input all data changes at each stage of the Cyclical Revaluation into the AssessPro CAMA system.

2.A.4: For each property where an owner wasn't home or was unavailable for an interior inspection at the initial visit, a door hanger will be left requesting a phone call to set up an appointment for an interior inspection. A second attempt at inspection will also be made at the end of the day. At the end of the data collection, a final letter will be sent requesting a phone call to set up an appointment for an interior inspection.

2.A.5: KRT, in conjunction with the Assessing staff, will verify all sales and mark as qualified or unqualified using the appropriate DRA code. Sales verification will be conducted by a DRA Certified Assessor Supervisor.

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

2.A.7: If requested, KRT shall verify building permits each year for the three (3) years of the contract.

B) Analysis

2.B.1: KRT will analyze all of the qualified sales for the time period of two (2) years prior to the assessment date of April 1, 2022 with focus given to the most recent year. Assessments shall be updated to conform to all applicable RSA's and be consistent with the Assessing Standards Board and Assessing Equalization Standards Board requirements for equitable assessments. All strata's tested (style, size, sale price, age, sale date, neighborhood, site index, and grade) will be within 5% of the desired median for all classes of property.

2.B.2: KRT will field review all sale properties that have transferred for two (2) years prior to April 1, 2022.

2.B.3: KRT will compute, to the nearest One Hundred Dollars (\$100), the value of all properties within the City.

2.B.4: Land values will be established for all properties within the City by analyzing two (2) years worth of vacant land sales. For additional support, a land residual technique will be utilized. Factors to be considered in land valuation shall include lot size, neighborhood, zoning restrictions, shape, topography and any other factors deemed relevant after closer investigation.

2.B.5: Residential values will be generated utilizing a “market adjusted” cost approach. To achieve this, a cost analysis will be done to determine the Replacement Cost New (RCN) for all building types within the City. Factor’s to be considered include the style, grade or quality, size, number of bedrooms and bathrooms, and other various characteristics that affect value. Once the RCN is established, an analysis of the physical condition of the property relative to its age will be conducted. Once the depreciated building value is established, it is added to any outbuilding/extra feature value, and the land value to come up with the overall market value.

2.B.6: Commercial/Industrial values will be generated utilizing both the “market adjusted” cost approach and the income approach. KRT will make a thorough analysis of income and expense data reported on the Income and Expense forms returned to the City. Cap rates will be developed using a current publication of the Investor’s Survey as well as extracted from local market sales analysis. 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. Whenever possible, both values are then reconciled to within 10% of each other.

2.B.7: Income and expense forms will be mailed to all applicable improved commercial, industrial, mixed use, and apartment properties at KRT’s expense.

C) Field Review

2.C.1: KRT will review one hundred percent (100%) of the properties in the field. The personnel conducting this phase of the program will have a minimum of five (5) years of mass appraisal experience as well as be certified with the DRA as required.

2.C.2: It is understood that KRT will have the ability to exercise good judgment in making final value estimates. KRT, in order to ensure valuation accuracy and consistency, will have no more than four (4) field review appraisers work in the City.

2.C.3: KRT shall review existing neighborhood and neighborhood modifier delineations, and modify them as indicated by the sales analysis.

2.C.4: KRT will input all field review data changes into the CAMA system.

D) Informal Hearings/Reporting

2.D.1: KRT in conjunction with the Assessor, 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 for 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 recommends that the hearings are completed in the same fashion as the 2018 Statistical Update using local schools as a meeting place for the hearings.

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 one evening of hearings per Ward. Additional hearings can be held if needed.

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.

2.D.7: At the conclusion of the project, KRT will submit to the City and the Department of Revenue Administration (DRA) a full Uniform Standards of Professional Appraisal Practice (USPAP) compliant report detailing the results from the update. This bound report will meet all DRA requirements under Standard 6 and will contain, at a minimum, the following information:

- a) A Letter of Transmittal
- b) A Certification Statement
- c) A section detailing the scope of work
- d) A section detailing the methodology used for determining values
- e) A section including all tables, cost schedules, and a neighborhood map
- f) A section including all statistical analysis and testing

2.D.8: If requested, KRT, will review, process, and provide written recommendations for all properly filed abatements for the Cyclical Revaluation tax year (2022).

3) PROGRESS AND CONTROL

3.1: KRT shall turn over all final deliverables to the City no later than September 1, 2022 to ensure timely submission of the required MS-1 form. The project shall begin no later than thirty (30) days from the execution of the contract. Below is a proposed Cyclical Revaluation Timeline:

Task	Start Date	Completion Date
Start Up Meeting with City and DRA		11/15/19
Public Relations	On-Going	
Measure and List All Properties	11/18/19	01/31/22
Data Entry	11/25/19	01/14/22
Callback Appointments	01/17/22	04/22/22
Sales Field Review	04/25/22	05/06/22
Cost Modeling/Update Tables	05/09/22	05/27/22
Preliminary Residential Analysis	05/09/22	05/27/22
I&E Review/C&I Preliminary Valuation	05/09/22	05/27/22
Field Review	05/30/22	07/08/22
Final Valuations	07/11/22	07/22/22
Assessor/City/DRA Review of Values	07/25/22	07/29/22
Impact Notices	08/01/22	08/05/22
Informal Hearings	08/08/22	08/19/22
Hearing Review/Field Work	08/22/22	08/26/22
Final Products Delivered	08/29/22	08/31/22
Project Completion		09/01/22

3.2: It is recognized that the plan for operation may require alteration from time to time and the City shall not unreasonably require strict adherence to the plan, however, any change in starting date or completion date must be requested in writing by KRT and must be approved by the City. The City may grant an extension of the completion date not to exceed thirty (30) days to conclude any additional work required under the terms herein specified 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 submission of a written request by KRT stating the reasons for an extension request.

3.3: At the end of every month, the Assessor will receive a status report via email. Different from an invoice, this report will inform the City of the Revaluation progress including the percentage of completion for each major task of the project. It is up to the City to promptly notify KRT if there are any recommended changes.

3.4: Failure to complete all work prior to September 1, 2022 shall cause KRT to pay the City One Thousand One Hundred Dollars (\$1,100.00) per calendar day beyond the specified date of completion. Delays caused by war, strike, explosion, acts of God or an order of court of competent jurisdiction, and any other factors beyond the reasonable control of KRT are excluded.

4) PUBLIC RELATIONS

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

4.2: KRT will hold, at a minimum, one (1) educational/informational meeting for the Nashua taxpayers. This meeting(s) will serve to inform and educate the public at large of the following points:

- a) Necessity of a Revaluation
- b) Progress and status of the project
- c) Goals of the project
- d) Roles of the City, KRT, and DRA
- e) Qualifications of KRT
- f) Necessity of taxpayer cooperation
- g) Disclosure aspects throughout the project
- h) On-going nature of completed system

4.3: KRT shall make available the project supervisors for all speaking endeavors and meetings with various groups as a means of establishing and promoting understanding and support for the Cyclical Revaluation program. KRT shall supply visual aids and other media at its disposal to this end. All prepared releases shall be submitted to the City for review prior to public dissemination.

5) EQUIPMENT AND SUPPLIES

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

- a) Adequate office space with furniture, chairs and filing cabinets
- b) Access to a computer and printer
- c) Access to a telephone for local calls
- d) Two (2) sets of current tax maps as well as the most current zoning maps
- e) A City map for creating the final neighborhood map
- f) Remote access to AssessPro CAMA

5.2: The City shall cooperate with KRT by providing all existing data from current property record cards. The City shall further assist KRT in providing or making available any information it possesses or is conveniently available that may be required for the execution of the project.

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

5.4: All forms utilized throughout the project shall first be approved by the City as to format, design, content, shape, size, color, and quality.

6) PAYMENT SCHEDULE

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

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

6.3: The City is required to make timely percentage payments on the contract to KRT, within thirty (30) days, equal to eighty percent (80%) of the contract amount represented by work completed during the month as finally determined by them.

6.4: If the City determines that KRT's invoice is inaccurate, the City shall give written notice specifying exactly which portion(s) is found to be unsatisfactory. KRT shall make every effort to correct the inaccuracy. The City shall retain the right to delay payment, only for the specified item(s), until said item(s) is resolved to the satisfaction of both the City and KRT. Upon satisfactory resolution, the City shall pay KRT said amount due, less twenty percent (20%).

6.5: KRT requests the retainage to be released in the following manner:

- e. Five percent (5%) on or about January 1, 2021 when the data collection is halfway complete;
- f. Five Percent (5%) on or about May 1, 2022 once the data collection and callbacks are complete;
- g. Eight percent (8%) once final notices have been mailed from the informal hearings, and;
- h. Two percent (2%) once the compliant Cyclical Revaluation USPAP manual has been received by the City.

7) INSURANCE

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

7.2: KRT's general liability policy has limits of two million dollars (\$2,000,000) per occurrence and four million dollars (\$4,000,000) aggregate. This policy provides

comprehensive coverage against claims for personal injury, death, or property damage. Documentation shall be made available within thirty (30) days if awarded the contract.

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. Documentation shall be made available within thirty (30) days if awarded the contract.

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. Documentation shall be made available within thirty (30) days if awarded the contract.

8) EMPLOYEES

8.1: KRT's employees shall at all time treat the taxpayers, residents, and City employees with respect and courtesy.

8.2: The City, at its sole discretion, shall reserve the right to request that any employee involved in the project be removed for any reason it deems appropriate or in the best interest of the City.

8.3: KRT shall not employ or compensate, in any way, a City Officer, agent, or employee, or any member of the family of such officer or employee of the City of Nashua in the performance of any work on this project.

8.4: All KRT employees are certified with the DRA to complete the tasks they will be assigned for. All employees assigned to this project shall only complete tasks that their level of certification allows.

8.5: All KRT employees working outside the City Hall or assigned in office quarters will, at all times, wear an identification badge, in a format acceptable to the City, on a conspicuous location upon their person. All employees will allow for close inspection of the badge upon request of any interested party.

9) TERMINATION

9.1: 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 New Hampshire, an Act of God, war, civil disobedience, extraordinary weather conditions, labor disputes, shortages or fluctuation in electric power, heat, light, or air conditioning. Dates or time of performance will be extended automatically to the extent of such delays provided that the party whose performance is affected notifies the other promptly of the

existence and nature of such delay. It is agreed, however, that since the performance dates of this contract are important to the implementation of ongoing property value update programs, continued failure to perform for periods aggregating sixty (60) or more days even for causes beyond the control of KRT, shall be deemed to render performance impossible, and the City shall thereafter have the right to terminate this agreement in accordance with the provisions of the section entitled, "Termination."

9.2: 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 ten (10) business days after written notice of such failure or violation is received by KRT, then the City shall thereupon have the right to terminate this agreement by giving written notice to KRT of such termination and specifying the effective date thereof, at least seven (7) days before the effective date of such termination.

10) ASSIGNMENT OF CONTRACT

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

11) CERTIFICATION OF NON-COLLUSION

11.1: The undersigned certifies under penalties of perjury that this bid is in all respects bona fide, fair and made without collusion or fraud with any other person. As used in this section the word "person" means any natural person, joint venture, partnership, corporation, or other business or legal entity.



Signature

9/24/19

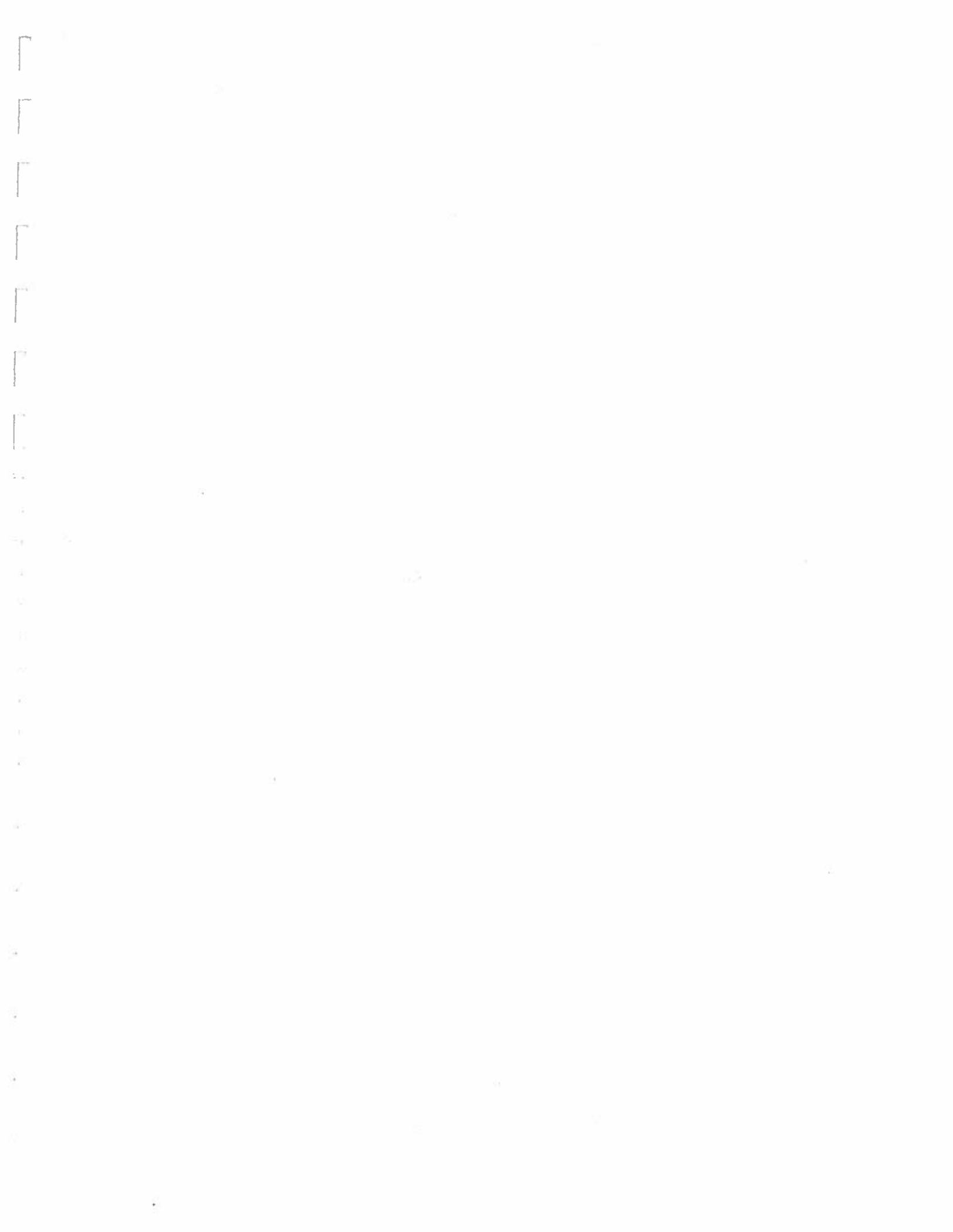
Date

Robert A. Tozier

Printed Name

Vice President

Title



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. KRT's 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. KRT offers a wide variety of services. These services include:

- ❖ Data Collection
- ❖ Digital Imaging
- ❖ Building Permit Review
- ❖ Data Quality Studies
- ❖ Consulting
- ❖ Abatement Review
- ❖ Statistical Updates
- ❖ Full/Cyclical Revaluations
- ❖ 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 the area of appraisal and assessment administration. KRT Appraisal was created with this in mind. As a small company, KRT Appraisal can offer more hands-on services at competitive prices.



QUALIFICATIONS

1) PROJECT STAFFING

All of KRT's management and field staff have been approved by the Department of Revenue Administration (DRA). KRT will be responsible for the supervision of all phases of the project and will employ the following organizational structure to manage the project:

Title	Name	DRA Status	Experience
Residential Project Manager	Robert Tozier	Supervisor	19 Years
Commercial Project Manager	Kenneth Rodgers	Supervisor	27 Years
Appraiser	Kevin Leen	Supervisor	34 Years
Appraiser/Data Collector	Joey Smith	Supervisor	31 Years
Appraiser/Data Collector	Doug Rollins	Assistant Assessor	5 Years
Data Collector	*Ken Eckland	Measure and Lister	1 Year
Data Collector	*Wesley Smith	Measure and Lister	1 Year

* These two employees have been working for KRT solely in Maine and are in the process of being certified in NH with DRA.

Resumes of each KRT associate are provided in Section I. Each resume contains prior work experience, positions held, responsibilities of each position, and educational and professional affiliations for each individual. Any change to the project staffing plan shall be submitted to the City, in writing, for review and approval. The City shall notify KRT of the acceptance or rejection of any staff substitutions within ten (10) business days of the receipt of the proposed changes. The City shall reserve the right to make final determination regarding the acceptability of the proposed personnel changes.

2) CAMA SYSTEM

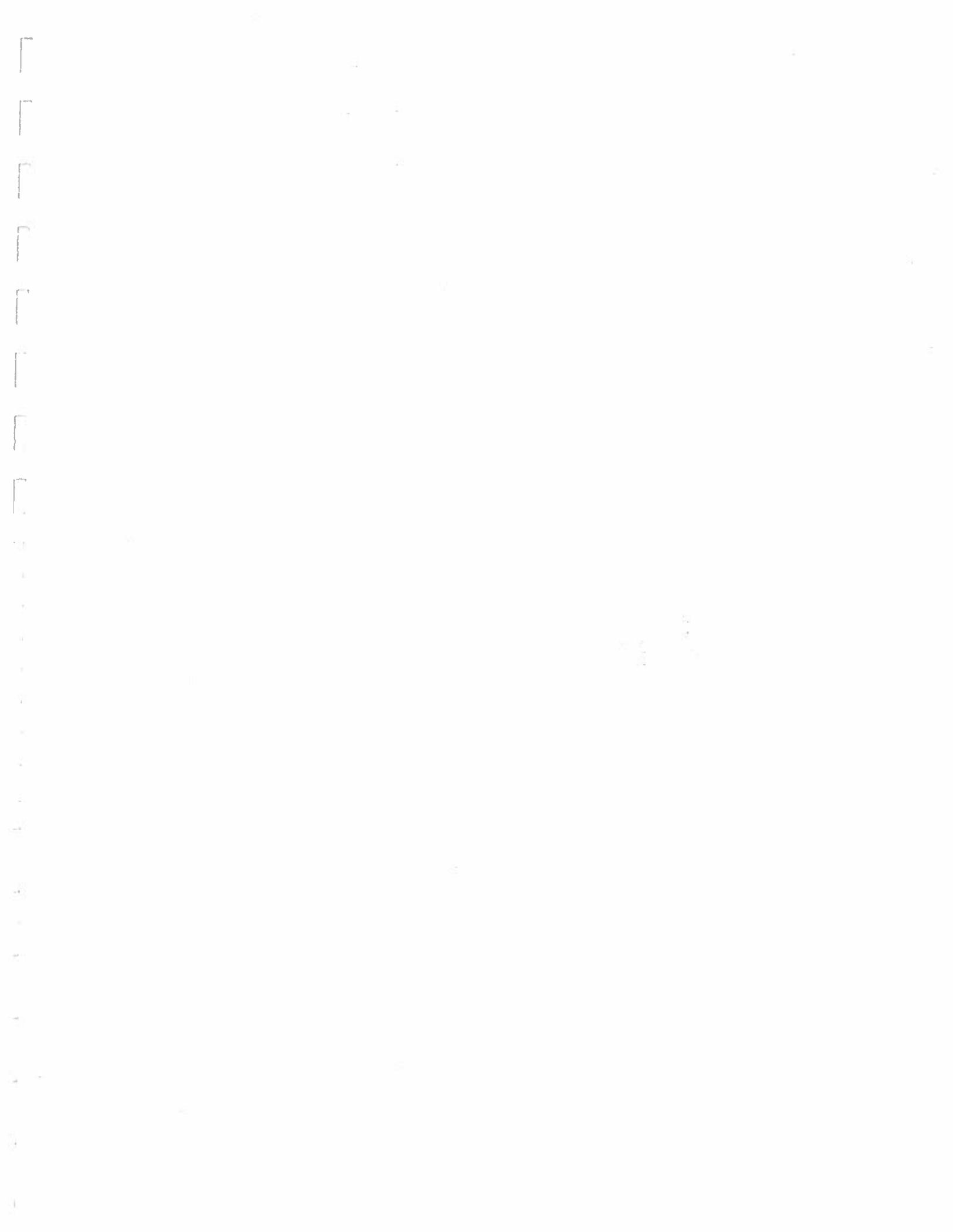
KRT has hands-on experience using the AssessPro CAMA system. KRT's upper management have a widespread knowledge of cost modeling, table maintenance, and analysis/valuation using this CAMA system. KRT has completed over fifty revaluations, with some, including Nashua in 2018, using the AssessPro CAMA system.

3) 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. 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>
Baldwin, ME	1,100	Full Revaluation	2020	Ben Thompson	(207) 699-2475
Littleton, NH	3,400	Statistical Update	2020	Andrew Dorsett	(603) 444-3996
Rockpland, ME	3,700	Statistical Update	2020	Roxy LaFrance	(207) 594-0303
Lyman, ME	2,800	Full Revaluation	2020	Alex Konczal	(207) 247-0645
Grantham, NH	2,500	Statistical Update	2020	Melissa White	(603) 863-6021
Rindge, NH	2,800	Cyclical Revaluation (2018-2020)	Current	Dave DuVernay	(603) 899-5181
Amherst, NH	5,000	Contract Assessor/Cyclical Data Collection	Current	Michele Crowley	(603) 673-6041
Belmont, NH	4,300	Contract Assessor	Current	Jeanne Beaudin	(603) 267-8300
Berlin, NH	4,600	Contract Assessor/Cyclical Data Collection	Current	James Wheeler	(603) 752-7532
Bethlehem, NH	2,200	Contract Assessor	Current	April Hibberd	(603) 869-3351
Gorham, NH	1,700	Contract Assessor/Cyclical Data Collection	Current	Michelle Lutz	(603) 466-3322
Kingston, NH	3,150	Contract Assessor/Cyclical Revaluation	Current	Susan Ayer	(603) 642-3342
Grantham, NH	2,500	Contract Assessor	Current	Melissa White	(603) 863-6021
Harpswell, ME	4,500	Assessing Consultant	Current	Debbie Turner	(207) 833-5771
Rindge, NH	2,800	Contract Assessor	Current	Dave DuVernay	(603) 899-5181
Strafford, NH	3,500	Contract Assessor/Cyclical Data Collection	Current	Ellen White	(603) 664-2192
Troy, NH	1,200	Contract Assessor	Current	William T. Matson	(603) 242-7722
Warren, NH	1,050	Contract Assessor	Current	Board of Selectmen	(603) 764-7705
Scarborough, ME	9,000	Residential Full Revaluation	2019	Larissa Crocket	(207) 730-4149
Milford, NH	5,500	Residential Statistical Update	2019	Marti Noel	(603) 249-0615
Belmont, NH	4,300	Cyclical Revaluation	2019	Jeanne Beaudin	(603) 267-8300
Claremont, NH	5,500	Cyclical Data Collection	2018	Ryan McNutt	(603) 542-7004
Hampden, MA	2,400	Statistical Update	2018	Carolyn Reed	(413) 566-2151
Hooksett, NH	6,000	Statistical Update	2018	LeeAnn Moynihan	(603) 268-0003
Littleton, NH	3,400	Statistical Update	2018	Andrew Dorsett	(603) 444-3996
Longmeadow, MA	6,000	Statistical Update/Contract Assessor	2018	Lawrence Rubin	(413) 565-4115
Nashua, NH	28,500	Statistical Update	2018	Kim Kleiner	(603) 589-3040
Scarborough, ME	750	C/I Full Revaluation	2018	Larissa Crocket	(207) 730-4149
Bethlehem, NH	2,300	Statistical Update	2018	April Hibberd	(603) 869-3351
Nantucket, MA	9,500	C&I Interim Update, Building Permits	2018	Debbie Dilworth	(508) 228-7200
Troy, NH	1,200	Statistical Update	2018	Christina Perez	(603) 242-7722
Brunswick, ME	9,500	Full Revaluation	2017	Cathy Jamison	(207) 725-6650
Camden, ME	4,000	Statistical Update	2017	Kerry Leichtman	(207) 236-3353
Claremont, NH	5,500	Assessing Consultant	2017	Marlene Jordan	(603) 542-7004
Danvers, MA	300	Cyclical Data Collection	2017	Steve Poulos	(978) 777-0001
Gorham, NH	1,700	Contract Assessor/Cyclical Data Collection	2017	Michelle Lutz	(603) 466-3322
Gorham, NH	1,700	Statistical Update	2017	Michelle Lutz	(603) 466-3322
Stow, MA	3,000	Cyclical Data Collection	2017	Kristen Fox	(978) 897-4597
Amherst, NH	5,400	Statistical Update	2016	Michele Crowley	(603) 673-6041
Charlestown, NH	2,500	Statistical Update	2016	Patricia Chaffee	(603) 826-4400
Goffstown, NH	4,000	Cyclical Data Collection	2016	Scott Bartlett	(603) 497-8990
Keene, NH	6,600	Residential Update	2016	Dan Langille	(603) 352-2125
Laconia, NH	600	Commercial Update	2016	Deborah Derrick	(603) 527-1268
Melrose, MA	427	Full Commercial M&L	2016	Chris Wilcock	(781) 979-4103
Milford, NH	5,500	Statistical Update	2016	Marti Noel	(603) 249-0615
Milford, NH	5,500	Data Collection 1,500 Parcels	2016	Marti Noel	(603) 249-0615
Nantucket, MA	9,500	C&I Interim Update, Building Permits	2016	Debbie Dilworth	(508) 228-7200
Newburyport, MA	5,700	Cyclical Data Collection 1,300 Parcels	2016	Dan Raycroft	(978) 465-4403
Salem, NH	12,700	Statistical Update	2016	Norm Pelletier	(603) 890-2018
Strafford, NH	3,500	Statistical Update	2016	Ellen White	(603) 664-2192
Warren, NH	1,050	Statistical Update	2016	Board of Selectmen	(603) 764-5780
Yarmouth, ME	3,700	Statistical Update	2016	Renee Lachapelle	(207) 699-2475
Rockport, ME	3,500	Statistical Update	2015	Kerry Leichtman	(207) 236-6758



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, Northboro, 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.

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

International Association of Assessing Officers

- 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)

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)

Vision Appraisal Technology, Northborough, MA

- 1) 80 Hour In-house Training Program (2003)

State Of New Hampshire Department Of Revenue Administration: Certified Real Estate Assessor Supervisor. Expires December 31, 2020.

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

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

International Association of Assessing Officers/McKissock:

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
2018-2019 USPAP Update
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 Course 1 and 2
Multiple Regression Analysis, SPSS
Intro to Statistics, 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
Course 1A; Massachusetts Board of Real Estate Appraisers

Expert Witness

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

KEVIN T. LEEN

MASS APPRAISAL EXPERIENCE

KRT APPRAISAL, HAVERHILL, MA

04/2018- **Appraiser/Project Manager**

Present Responsible for budgeting, planning, implementing and running revaluation projects for various municipalities. Specific duties include the mass appraisal of residential and commercial properties. Duties include property sales review and verification, statistical analysis, model calibration, the supervision of data collectors and field review appraisers, taxpayer hearings, all reporting requirements as they relate to project certification and jurisdictional ad valorem defense of value.

VISION GOVERNMENT SOLUTIONS, NORTHBOROUGH, MA

08/2004- **Senior Appraiser/Project Manager**

04/2018 Responsible for budgeting, planning, implementing and running revaluation projects for various municipalities. Specific duties include the mass appraisal of residential and commercial properties. Duties include property sales review and verification, statistical analysis, model calibration, the supervision of data collectors and field review appraisers, taxpayer hearings, all reporting requirements as they relate to project certification and jurisdictional ad valorem defense of value.

09/2001- **Senior Appraiser**

08/2004 Review residential and commercial properties for revaluation purposes. Responsibilities include sales and non-sales review, sales analysis, set neighborhood factors for land based on sales analysis, establish land and building methodology, building cost pricing and analysis, coordinate field review operations, taxpayer hearings and assist in client consultations. Assist in reporting requirements in relation to project certification and jurisdictional ad valorem defense of value.

04/1999- **Staff Appraiser**

09/2001 Review residential properties for revaluation purposes. Responsible for overseeing sales data collection and verification, total data collection effort and completing complex data collection assignments which may be beyond the scope of normal data collection personnel, quality control of data, and hearings with taxpayers. Maintaining a high level of operating competence and efficiency and monitoring and 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/CERTIFICATIONS

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
IAAO Course 300: Fundamentals of Mass Appraisal
MAAO Course 3: The Income Approach to Value
Residential Report Writing Case Studies
Issues Pertaining to Shoreland Properties-Maine
IAAO Course 400: Assessment Administration
Excel for Assessors
NHAAO/State of New Hampshire DRA State Statues Part 1 (2010)
NHAAO/State of New Hampshire DRA State Statues Part II (2010)
NHAAO/State of New Hampshire DRA State Statues Update (2018)
National USPAP Update Course (1999), (2003), (2007), (2012), (2014), (2016), (2018)

Vision Appraisal Technology, Northborough, MA: 80 Hour In-house Training Program

State Of New Hampshire Department Of Revenue Administration: Certified as Real Estate Assessor Supervisor.

Certified Maine Assessor (CMA) No. 740

Connecticut Office of Policy and Management: Certified as Residential/Land Appraiser

State of New Hampshire: Certified Residential Appraiser, NHCR385 (Inactive)

JOEY L. SMITH

MASS APPRAISAL EXPERIENCE

KRT APPRAISAL, HAVERHILL, MA

03/2018- Appraiser/Assessor

Present Responsible for the assessing functions for multiple municipalities. Specific duties include supervising data collectors for cyclical inspections, providing abatement and tax appeal support, reviewing deeds and lot splits, reviewing personal exemptions, building permit review, administering current use and the issuing of the land use change taxes, and the overall management of the assessor's duties. Mass appraisal duties include data collection, sales review/verification, field review and informal hearings.

CORCORAN CONSULTING ASSOCIATES, WOLFEBORO, NH

03/2012- Contracted Assessor

06/2016 Conducted field reviews for abatements, inquiries, physical changes and sales verification. Responsible for maintenance and accuracy of assessing database. Processed abatements and validated sales data per transfer documents. Analyzed waterfront sales data for defense of values. Conducted meetings with taxpayers and representatives.

MUNICIPAL RESOURCES INC, MEREDITH, NH

01/2001- Contracted Assessor

03/2012 Testified at Board of Land and Tax Appeals and prepared documentation for superior court defense. Responsible for personal property account maintenance and discovery. Participated in grievance hearings, formal and informal. Maintained current use assessments and timber tax bills. Negotiated PILOT with Regional Hospital Board of Directors. Provided training for new field employees.

JF RYAN ASSOCIATES, NEWBURYPORT, MH

01/1994- Project Manager/Appraiser

01/2001 Responsible for the appraisal of properties for mass appraisal purposes. 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, field review and sales analysis.

COLE LAYER TRUMBLE, NEWBURYPORT, MA

01/1988- **Commercial Staff Appraiser**

01/1994 Measured and inspected properties, commercial and residential, for assessment purposes. Conducted final review of residential properties and apartment buildings.

APPRAISAL EDUCATION/CERTIFICATIONS

International Association of Assessing Officers

- Course #101 Residential Property Valuation
- Course #102 Income Approach to value
- Course #300 Fundamentals of Mass Appraisal Fundamentals
- Course #310 Applications of Mass Appraisal Fundamentals
- Course #400 Assessment Administration
- Standards of Practice and Professional Ethics Workshop (USPAP)

State Of New Hampshire Department Of Revenue Administration: Certified as Real Estate Assessor Supervisor.

Certified New Hampshire Assessor (CNHA)

DOUGLAS ROLLINS

MASS APPRAISAL EXPERIENCE

KRT APPRAISAL, HAVERHILL, MA

10/2014- Present **Data Collector/Crew Chief**

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. NH DRA Certified Assessor Assistant.

WORK EXPERIENCE

ASSET MANAGEMENT SPECIALISTS, PORTSMOUTH, NH

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

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

LIBERTY REALTY GROUP, LYNFIELD, MA

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

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

STAPLES, BEVERLY, MA

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

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

EDUCATION

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

APPRAISAL EDUCATION

JMB Real Estate Academy (2016)
Basic Appraisal Principles

KRT Appraisal, Haverhill, MA (2014)
80 Hour In-house Training Program

WESLEY SMITH

MASS APPRAISAL EXPERIENCE

KRT Appraisal, Haverhill, MA

02/2019 - 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, digital imaging and callback appointments.

WORK EXPERIENCE

Hannaford Supermarket, Concord, NH

2018 – 2019

Dairy/Frozen Lead Associate – Assisted store managers in operation of dairy/frozen food departments. Ordered dairy products and processed deliveries. Operated power jack and forklift. Supervised full and part-time associates in their daily duties

Securitas, Manchester, NH

2017 – 2018

Security Guard/Receptionist – Worked exclusively as the lobby security guard/receptionist at Eversource Energy. Assigned and recorded visitor passes and employee parking permits. Provided access control and loss prevention services as needed. Maintained daily lines of interoffice communication via phone, email and in-person.

Sig Sauer, Inc, Newington, NH

2016 – 2017

Quality Control Inspector – Took a basic armorer's course to learn many of the Sig Sauer products. Ensured Sig Sauer firearms meet the highest standard of functionality and aesthetics. Inspected firearms and individual parts at the manufacturing and packaging stages.

Air National Guard, South Portland, ME

2012 – 2016

RF Transmission Specialist – Maintained, installed and troubleshot radio and satellite based communications equipment. Maintained military decorum and the practices of integrity and excellence. Trained and worked in fixed and deployed environments.

EDUCATION

Granite State College, Online Courses (May 2019-Current)

Working towards a Bachelor of Arts, Majoring in Digital Media

Maine Criminal Justice Academy, Vassalboro, ME (2014)
Awarded Certificate as Corrections Officer

Keesler Air Force Base, Biloxi, MS (2013)
338th Training Squadron
Awarded Certificate in Radio Frequency Transmission Systems

Mt. Washington College, Manchester, NH (2007)
Associate's Degree in Criminal Justice

APPRAISAL COURSES/TRAINING

KRT Appraisal, Haverhill, MA (2019)
80 Hour In-house Training Program

KENNETH ECKLAND

MASS APPRAISAL EXPERIENCE

KRT Appraisal, Haverhill, MA

08/2018 - Present

Data Collector - 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, digital imaging and callback appointments.

WORK EXPERIENCE

JJill Distribution Center, Tilton, NH

03/2017 – 08/2018

General Staff – Sorted and delivered product and supplies to necessary locations such as departments, customers, and retail stores. Inspected product to be sure it was in top notch condition for delivery to stock, required further maintenance, or needed to be disposed of.

Morrison Healthcare, Clinton, MA

01/2015 – 03/2017

Catering Associate – Promoted to this opportunity and reporting to the food services manager; my responsibilities include ensuring the selection of meal quality, patient satisfaction, consulting with the resident dietician for special patient needs, providing satisfactory meal selections and options, assuring that each patient consumes adequate nutrition with their meals, maintains cleanliness and maintenance throughout the service department and on an “as needed” basis, leads and manages work shifts.

H&R Block, Natick, MA

01/2015 – 05/2015

Tax Preparer – As a seasonal employee, received training in Tax Income Courses and obtained a certification from the company to work with individuals/families concerning their state and annual taxes.

EDUCATION

Nichols College, Dudley, MA (2010-2014)

- Bachelor of Science, Majoring in Business

APPRAISAL COURSES/TRAINING

KRT Appraisal, Haverhill, MA (2018)

80 Hour In-house Training Program

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 corporate operations including payroll, budgeting, marketing, customer support, 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 all reporting requirements as they relate to project certification.

VISION APPRAISAL TECHNOLOGY, NORTHBOROUGH, MA

10/2006- Project Manager

4/2010 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

9/2006 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

5/2003 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.





THE CITY OF NASHUA

Administrative Services

Purchasing Department

"The Gate City"

August 28, 2019

REQUEST FOR PROPOSALS

PROPOSALS FOR FULL MEASURE AND LIST APPRAISAL AND REVALUATION FOR THE CITY OF NASHUA, NH RFP0023-092619

The City of Nashua, NH, herein referred to as "the City", is seeking proposals from qualified, interested parties to submit their Qualifications and a Detailed Cost Proposal for the full measure and list appraisal and revaluation within the corporate limits of the Municipality for the City of Nashua, New Hampshire. This proposal includes revaluation of all taxable and nontaxable properties over time and updating an establishment of the new base year, to arrive at full and true value as of April 1, 2022. Results will be validated by submitting to the City and the Department of Revenue Administration (DRA) Uniform Standards of Professional Appraisal Practice (USPAP) compliant appraisal report.

The Scope of Work may be found on Pages 5 through 15 of this Request for Proposals.

INSTRUCTIONS TO VENDORS:

The City is now accepting submittals electronically via Bid Express. A Digital ID is not required to submit via Bid Express for this RFP. Please review the attachments, Bid Express Vendor Guide and Vendor Set-up Guide for more information. Proposal submission shall consist of two parts; a proposal outlining the Proposer's qualifications and, in a separate sealed envelope or attachment if using Bid Express, a price proposal. If a PROPOSER chooses to submit a paper copy, they must submit in triplicate (one (1) original and two (2) copies) in sealed envelope(s) or package(s) clearly marked "RFP0023-092619 Proposals for Full Measure and List Appraisal and Revaluation for the City of Nashua, NH". Proposals must be submitted in the format provided and address the item(s) specified in the proposal package. Regardless of the method of submission, proposals must be received no later than **3:00 PM on Thursday, September 26, 2019**. Paper proposals must be submitted to the Purchasing Department; City Hall, 229 Main Street, Lower Level, Room 11, Nashua NH 03061.

Postmarks or other timestamps will not be accepted in lieu of actual delivery. The PROPOSER can use whatever delivery mechanism it chooses as long as it remains clear that the PROPOSER is responsible for submissions prior to the date and time. Further details are available on the City's web site, www.nashuanh.gov, under Services: Bid Opportunities: Current Bids and on the Bid Express website; (Refer to Document RFP0023-092619). Proposals will be opened in public on the due date and time. Results of the proposal opening will be posted on the City's website, www.nashuanh.gov, under Services: Bid Opportunities: Bid Results; (Refer to Document RFP0023-092619) within twenty-four (24) hours of the opening.

Delivery of the Proposals shall be at the PROPOSER'S expense. The time of receipt shall be considered when a Proposal has been officially documented by the Department, in accordance with its established policies, as having been received at the location designated above. The City of Nashua accepts no responsibility for mislabeled mail. Any and all damage that may occur due to shipping shall be the Vendor's responsibility. The City of Nashua assumes no liability for the payment of costs and expenses incurred by any PROPOSER in responding to this request for proposals. All proposals become the sole property of the City of Nashua. This request for proposals is not a contract and alone shall not be interpreted as such but rather serves as an instrument through which proposals are solicited.

The final contract related to this RFP is subject to and contingent upon the City of Nashua Board of Aldermen (BOA) approval of bonding or any other method of funding the City chooses to provide for this project.

FULL STATISTICAL REVALUATION PERFORMANCE BOND

Contractor, before starting any full statistical revaluation work, shall deliver an executed bond or irrevocable letter of credit in favor of Municipality, or as otherwise agreed upon, with which it is contracting to assure faithful and satisfactory performance of the contract, and provide a copy to the DRA. The amount of such bond or letter of credit shall be no less than the amount of compensation to be paid by Municipality to Contractor for services to be performed, and shall not expire before final values are submitted to and accepted by the municipal assessing officials.

To be eligible for an award, a PROPOSER must be deemed "responsible". A responsible PROPOSER 1) has the ability, capacity and skill to provide the goods or services required; 2) can provide the goods or services within the time frame specified; 3) has a satisfactory record of integrity, reputation, judgment and experience; 4) has sufficient financial resources to provide the goods or services; 5) has an ability to provide future maintenance and support as required; and 6) has developed a positive track record with the City of Nashua to the extent the PROPOSER has previously provided goods or services.

The City of Nashua also reserves the right to negotiate any change or amendment in any proposal without soliciting further proposals.

The City of Nashua may reject any or all of the proposals on any basis and without disclosure of a reason. The failure to make such a disclosure shall not result in accrual of any right, claim or cause of action by any unsuccessful participant against the City of Nashua.

Each proposal shall address the proposed methodology, personnel, and philosophy, including the use of effective year built as opposed to grade, condition and other factors in applying depreciation.

The City of Nashua may conduct discussions with responsible PROPOSERS prior to selection. The successful CHOSEN CONTRACTOR shall begin performance upon receipt of an Executed Contract and a valid Purchase Order issued from the City of Nashua.

Final terms and conditions will be negotiated between the City and the successful CHOSEN CONTRACTOR prior to the Contract Award.

The timeline for this project is as follows:

	Date	Time
Non-Mandatory Pre-Proposal Meeting	Thursday, September 5, 2019	10:00 AM City Hall 229 Main Street Room 208 Nashua, NH 03061
Deadline for Vendor Questions	Monday, September 9, 2019	5:00 PM
Answers/Clarifications Posted	Wednesday, September 11, 2019	5:00 PM
RFP Responses due	Thursday, September 26, 2019	3:00 PM Purchasing Department, City Hall, Lower Level, Room 11

There will be a non-mandatory pre-proposal meeting, Thursday, September 5, 2019, at 10:00 AM at City Hall, 229 Main Street, Room 208, Nashua, NH 03061 with City Staff. Attendance to this meeting is not mandatory but encouraged. Proposers who do not attend the pre-proposal meeting can submit questions in writing per dates specified in this RFP and submit proposals.

Proposers are encouraged to submit questions via email or via Bid Express; however, the City assumes no liability for assuring accurate and complete email transmission/receipt and is not responsible to acknowledge receipt. **Inquiries must be submitted in writing, citing the RFP title, RFP number, Page, Section, and received no later than Monday, September 9, 2019 at 5:00PM. Submit questions to the attention of:**

Kim Kleiner
City of Nashua NH – Administrative Services Director
Email: kleinerk@nashuanh.gov

The City will consider all timely-received questions and requests for change and, if reasonable and appropriate, will issue an addendum to clarify or modify this RFP. Answers to vendor submitted questions and other addenda will be posted under document RFP0023-091319 on the City of Nashua website; www.nashuanh.gov, under Services, Bid Opportunities; Current Bids and to Bid Express no later than **Wednesday, September 11, 2019 at 5:00 PM.**

The City of Nashua assumes no liability for assuring accurate/complete email transmission/receipt and is not responsible to acknowledge receipt.

Pursuant to NRO 5-78(F), the purchasing manager shall not solicit a proposal from a contractor who is in default on the payment of taxes, licenses or other monies due the city. Therefore, this proposal request is void as to anyone who is in default on said payments.

Sincerely,



Dan Kookan
Purchasing Manager
City of Nashua
kookend@nashuanh.gov

RFP0023-092619

PROPOSALS FOR FULL MEASURE AND LIST APPRAISAL AND REVALUATION FOR THE CITY OF NASHUA, NH

INTRODUCTION

The City of Nashua, NH, herein referred to as "the City", is seeking proposals from qualified, interested parties to submit a Scope of Work and Detailed Cost Proposal for a Full Measure and List Appraisal and Revaluation for the "the City".

- The project includes the valuation as of April 1, 2022 of the following categories of real property within the Municipality:
 - o All taxable real property, including land, buildings and improvements.
 - o All tax-exempt property.
 - o Valuation and application of current use regulations to all current use properties.
 - o The effective assessment date of this revaluation project shall be April 1, 2022 .
 - o Valuations and appraisals of all taxable and exempt real property shall reflect full market value as of April 1, 2022
 - o Approximate number of parcels as of April 1, 2022 . is as follows:
 - o Number of Properties:
24,735 Residential Improved
 - 59 Utilities Note: Utilities are included in this total but are not part of this Scope of Work with the exception of Land Value Tables**
 - 462 Tax Exempt (228 Vacant, 234 Improved)**
 - 1,959 Commercial/Industrial (229 Vacant, 1,730 Improved)**
 - 469 Vacant Parcels**
 - 870 Manufactured Homes**
 - 28,618 Total**

GENERAL REQUIREMENTS

- A. The successful consultant will be required to provide the City of Nashua with certificates of insurance for coverage as listed below and endorsements affecting coverage required by the contract within ten calendar days after the City issues the notice of award. The city requires thirty days written notice of cancellation or material change in coverage. The certificate and endorsements for each insurance policy must be signed by a person authorized by the insurer and who is licensed by the State of New Hampshire. General Liability, Employer's Liability and Auto Liability policies must name the City of Nashua as an additional insured and reflect on the certificate of insurance:
 - General Liability insurance in the amount of \$1,000,000 per occurrence; \$2,000,000 aggregate; \$1,000,000 Professional Liability;
 - \$1,000,000 Combined Single Limit Automobile Liability; and
 - Workers' Compensation Coverage in compliance with the State of New Hampshire statutes, \$100,000/\$500,000/\$100,000.
- B. The Proposer shall meet all requirements of the Americans with Disabilities Act.
- C. The Proposer should understand that under the New Hampshire Right-to-Know Law, all documents submitted in response to this RFP, including financial information, are considered public information and will be made available to the public upon request, unless specifically exempted under the law.
- D. The City of Nashua may reject any and all proposals on any basis and without disclosure of a reason. The failure to make such a disclosure shall not result in accrual of any right, claim, or cause of action by any unsuccessful proposer against the City of Nashua.
- E. After the initial designation of a proposer, City Staff will work with the selected proposer to negotiate a contract that represents the agreement of the parties. The contract is subject to approval in accordance with the City's Purchasing Policy and is expected to take several weeks.
- F. The City of Nashua assumes no liability for the payment of costs and expenses incurred by any person in responding to this RFP. All proposals become sole property of the City of Nashua. This RFP is not a

contract and shall not be interpreted as such but rather serves as an instrument through which proposals are solicited.

SCOPE OF WORK

2. RESPONSIBILITIES AND SERVICES TO BE PERFORMED BY CONTRACTOR

2.1 Contract Submission

The contract, any revised contract, and the list of personnel assigned to work under the contract, shall be submitted to the DRA for examination and written recommendations of the DRA to be made to Municipality within 10 working days of receipt by the department. No work shall begin without first submitting a copy of the executed contract or agreement to the commissioner along with the names and qualifications of all personnel to be employed under the contract or agreement.

2.2 Assessment of all Property

2.2.1 *This cyclical revaluation shall commence in tax year 2019 and run through tax year 2022 when a full statistical revaluation analysis shall be conducted to bring values to 100% of market value or as close thereto as practicable.*

2.2.2 Contractor shall measure and list all taxable property (RSA 72:6) within Municipality in a good and workmanlike manner in accordance with RSA 75:1.

2.2.3 Contractor shall measure and list all tax exempt and non-taxable property (RSA 74:2) within the taxing jurisdiction of Municipality in the same manner as taxable property.

2.2.4 Contractor shall measure, list and verify all sales used to determine benchmarks for the revaluation.

2.2.5 The contractor shall update the existing assessment information to correct errors or omissions pertaining to:

- (1) Incorrect measurements; and
- (2) Physical changes, which may include, but not be limited to:
 - a. Additions;
 - b. Renovations;
 - c. Finished areas;
 - d. Structural alterations;
 - e. Outbuildings; or
 - f. Other site factors or improvements;

2.2.6 Contractor shall measure and list all new construction brought to their attention by Municipality via building permits, inventories and any other source.

2.2.7 (a) Contractor shall utilize Municipality's AssessPro CAMA System to appraise properties.

2.3 Completion of Work

2.3.1 Contractor shall complete all work and deliver the same in final form to the municipal assessing officials on or before September 1, 2022 to allow for quality control prior to final submission.

2.3.2 Liquidated damages of \$1,100 per day shall be paid by Contractor for each day required beyond the above stated completion date for delays caused by Contractor.

- 2.3.3 Contractor shall provide Municipality a list of all products to be delivered and dates of delivery thereof. The products include:
- (1) Property record cards in hard copy, electronic or both formats;
 - (2) The USPAP Compliant Appraisal Report;
 - (3) The Data Collection Manual;
 - (4) The CAMA System Manual; and,
 - (5) Any other products as deemed necessary by the municipal assessing officials (as described in Section 3).

- 2.3.4 The cyclical revaluation shall be considered satisfied and in its final form only when:
- (1) The informal review of assessments has been completed as described in Section 3.6;
 - (2) Any required value adjustments are made;
 - (3) The final values are submitted to and accepted by the municipal assessing officials;
 - (4) All products required by the contract are delivered to Municipality and the DRA;
 - (5) The DRA has completed its final monitoring report with a successful result;
 - (6) Values established by Contractor have been defended through the municipal abatement process, as described under RSA 76:16, for the year of the full statistical revaluation; and,
 - (7) All other terms of the contract have been satisfied.

2.4 Personnel

- 2.4.1 For grading, classifying, appraising and data collection of all property covered by the contract, Contractor shall only employ personnel who are:
- (1) Certified by the DRA, as defined in the Asb 300 Rules and RSA 21-J:14-f for the level of work they will be performing; and,
 - (2) Approved by the municipal assessing officials.
- 2.4.2 Contractor shall not compensate, in any way, a municipal official, employee or any immediate family member of such official or employee in the performance of any work under the contract unless previously disclosed and a prior full-time employee of the Contractor.
- 2.4.3 Upon approval of the contract and before the cyclical revaluation begins, Contractor shall provide to the DRA and the municipal assessing officials, a list of the DRA-certified personnel assigned to work under the contract.
- 2.4.4 Contractor shall ensure that the DRA-certified assessor supervisor is proficient in the use and calibration of the CAMA system that will be used to assess the property specified in Section 2.2.
- 2.4.5 Contractor shall ensure that the individual(s) assigned to perform data entry are proficient in the use of Municipality's CAMA system.
- 2.4.6 Contractor shall ensure that the DRA-certified assessor supervisor will be present where data is entered and computations are performed 100% of the time for the duration of the contract.

2.5 Public Relations

- 2.5.1 Contractor and the municipal assessing officials, during the progress of the work, shall each use their best efforts to promote full cooperation and amiable relations with taxpayers. All publicity and news releases shall be approved by the municipal assessing officials before being released to the news media. Contractor, upon request of the municipal assessing officials, shall provide assistance in conjunction with the

municipal assessing officials to acquaint the public with the mechanics and purpose of the cyclical revaluation.

2.6 Confidentiality

2.6.1 Contractor, municipal assessing officials or municipal employees shall not disclose any preliminary values to anyone or permit anyone to use or access any data on file during the course of the revaluation project, except the municipal assessing officials and the Commissioner of the DRA, or their respective designees, until the values have been submitted to the municipal assessing officials and made public.

2.7 Compensation and Terms

2.7.1 Municipality, in consideration of the services hereunder to be performed by Contractor, agrees to pay Contractor the sum total of \$ _____ dollars pursuant to the terms of the agreement as defined in Section 3. Payment shall be dispersed as follows:

<u>Year of Work</u>	<u>% or # of Parcels</u>	<u>Type of Work</u>	<u>Annual Payment</u>
2019		Measure/List	\$ xx
2020		Measure/List	\$ xx
2021		Measure/List	\$ xx
2022		Full Statistical Revaluation	\$ xx

Note: The above Compensation and Terms will be confirmed at the time the contract is completed.

2.7.2 The amount or terms of compensation to be paid by Municipality for assessing services to support and defend assessments that are appealed to the BTLA or superior court, if not included in Section 3 of the agreement, quoted on a hourly or daily basis plus expenses is: \$ _____ hourly / \$ _____ daily.

Note: The above Compensation and Terms will be confirmed at the time the contract is completed

2.7.3 The manner and time schedule in which Municipality shall make payments to Contractor shall be included in the contract.

2.7.4 A statement of any amount of retainage that may be withheld from Contractor until all of the terms of the contract have been satisfied.

2.7.5 Except as provided in Sections 2.7.2 and 2.7.3, the stated consideration in 2.7.1 represents the total payment for all contracted services.

3. DETAIL OF SERVICES TO BE PERFORMED BY CONTRACTOR

3.1 Collection of Property Data

3.1.1 All vacant land parcels and any attributes that may affect the market value shall be listed accurately. Such attributes may include, but not be limited to: number of acres; road frontage; neighborhoods; water frontage; water access; views; topography; easements; deeded restrictions and other factors that might affect the market value.

3.1.2 Every principal building(s), and any appurtenant building(s), or other improvements, shall be accurately measured and listed to account for the specific elements and details of construction as described in the data collection manual. Such elements and details may include, but not be limited to: quality of construction; age of structure; depreciation factors; basement area; roofing; exterior cover; flooring; fireplaces; heating & cooling systems; plumbing; story height; number of bathrooms; number of bedrooms; and, other features, attributes, or factors that might affect market value.

- 3.1.3 Contractor shall make an attempt to inspect the property, and if the attempt is unsuccessful, Contractor shall:
- (a) Leave a notification card at the property requesting that the property owner call the Contractor's designee, within a stated time frame as agreed upon by the municipal assessing officials and Contractor, to arrange for an interior inspection; or,
 - (b) Send a letter to the property owner requesting that the property owner call the Contractor's designee, within a stated time frame as agreed upon by the municipal assessing officials and Contractor, to arrange for an interior inspection at the contractor's expense;
 - (c) Contractor will provide opportunity for evening and weekend inspections.
- 3.1.4 If the contractor is not able to arrange for an interior inspection, or entrance to a building or parcel of land cannot be obtained as detailed in Section 3.1.5 below, Contractor shall:
- (a) Estimate the value of the improvements using the best evidence available; and,
 - (b) Annotate the property record card accordingly.
- 3.1.5 Contractor shall complete interior inspection of all properties except:
- (a) Where multiple attempts for inspection have been made without success and the owner or occupant has not responded to Contractor or the municipal assessing officials' notifications;
 - (b) Where postings prevent access;
 - (c) Unsafe structures;
 - (d) When the owner has refused access to Contractor or its designee;
 - (e) When inhabitants appear impaired, dangerous or threatening; and,
 - (f) Any other reason for which the municipal assessing officials agree that the property is inaccessible.
- 3.1.6 Contractor shall provide to Municipality a complete copy of the: field data collection card(s); worksheet(s); and, other document(s) used in the valuation process.
- 3.1.7 Contractor shall provide bi-weekly progress reports indicating the percentage of completion of the cyclical revaluation to the municipal assessing officials and the DRA.

3.2 Property Record Cards

- 3.2.1 Contractor shall prepare an individual property record card, for each separate parcel of property in Municipality arranged to show:
- (1) The owner's name, street number, map and lot number or other designation of the property;
 - (2) The owner's mailing address;
 - (3) Information necessary to derive and understand:
 - (a) The land value;
 - (b) The number of acres of the parcel;
 - (c) The land classification;
 - (d) The adjustments made to land values;
 - (e) The value of the improvements on the land;
 - (f) The accurate description of all improvements whether affecting market value or not;
 - (g) The improvement pricing details; and,
 - (h) The allowances made for physical, functional and economic depreciation factors;
 - (4) The outline sketch of all principal improvements with dimensions with the street side or waterfront toward the bottom of the diagram;
 - (5) The base valuation year;
 - (6) The print date of property record card;

- (7) Photograph of the principal building;
- (8) History of the property transfer to include:
 - (a) Date of sale;
 - (b) Consideration amount;
 - (c) Qualification code; and,
 - (d) Property type noted as either vacant or improved;
- (9) A notation area to record any comments pertaining to the property; and,
- (10) A notation area to record the history of the property, which shall include, but not be limited to:
 - (a) Property inspection date;
 - (b) Individual's identification number or initials associated with the inspection;
 - (c) The extent of the inspection;
 - (d) Reason for the inspection; and,
 - (e) Any value adjustment(s).

3.3 Full Statistical Revaluation Market Analysis

- 3.3.1 A DRA-certified property assessor supervisor shall conduct the market analysis.
- 3.3.2 A DRA-certified property assessor assistant, under the guidance of a DRA-certified property assessor or a DRA-certified property assessor supervisor, may validate or invalidate sales for the market analysis.
- 3.3.3 The municipal assessing officials shall provide to Contractor a copy of all property transfers for a minimum of two (2) years immediately preceding the effective date of the revaluation.
- 3.3.4 The market analysis shall be conducted by Contractor using accepted mass appraisal methods in order to determine land, improvements and any other contributory values or factors including:
 - (1) A review of all property transfers provided by the municipal assessing officials to Contractor;
 - (2) A compilation of all unqualified property transfers into a sales list with appropriate notations for those sales not used in the analysis accompanied by:
 - (a) The parcel map and lot number;
 - (b) The disqualification code;
 - (c) The date of sale; and,
 - (d) The sale price.
 - (3) A compilation of all qualified property transfers into a sales list with appropriate notations for those sales used in the analysis accompanied by:
 - (a) The parcel map and lot number;
 - (b) The date of sale;
 - (c) The sale price;
 - (d) The newly established value;
 - (e) A photocopy or printout of the property record card for each property transferred; and,
 - (f) A photograph of the principal improvements attached thereto;
 - (4) Estimated land values with the documented results, as follows:
 - (a) Utilizing vacant land sales whenever possible; and,
 - (b) In the absence of an adequate number of vacant land sales, the land residual method or other recognized land valuation methodologies shall be used to assist in the determination of land unit values;
 - (5) The Indicated land values shall be documented as:
 - (a) Site;
 - (b) Front or square foot;
 - (c) Front acre;

- (d) Rear acre units; and/or.
- (e) Other appropriate units of comparison;
- (6) An analysis section to include:
 - (a) The sale price; and.
 - (b) Supporting adjustments made in sufficient detail to be understood by the municipal assessing officials and taxpayers;
- (7) The market analysis used to indicate unit values with the documentation of the method(s) employed and any special adjustment factors; and.
- (8) Tax Maps showing the locations of all qualified sales and the delineation of neighborhoods.

3.3.5 The preliminary market analysis shall:

- (1) Be provided to the municipal assessing officials and the DRA prior to the acceptance of the new values by the municipal assessing officials;
- (2) Be printed in its final form, and provided to the municipal assessing officials and the DRA at the completion of the revaluation as part of the USPAP compliant report; and.
- (3) Become property of Municipality and the DRA.

3.3.6 Contractor shall ensure that a final comprehensive review of the newly established values shall be performed by a DRA-certified property assessor supervisor utilizing a parcel-by-parcel field review of the entire Municipality to:

- (1) Ensure that all properties are valued at their highest and best use; and.
- (2) Identify and correct: any mechanical errors; inconsistencies; unusual features or value influencing factors.

3.3.7 Any supporting documentation supplied, provided or utilized by Contractor in the process of compiling the market analysis, such as but not limited to: sales verification sheets; rental/expense statements and questionnaires; Contractor cost estimates; sales listing sheets; final review notes; etc., shall be relinquished to and become property of Municipality.

3.4 Full Statistical Revaluation Approaches to Value

3.4.1 The valuation of property for the revaluation shall be completed by utilizing recognized approaches to value, which may include, but not be limited to:

3.4.2 Cost Approach:

- (1) The cost approach, when utilized, shall be implemented by calibrating and applying land valuation tables, building valuation tables and unit costs as follows:
 - (a) Investigate, with documented analysis, land values for residential, commercial, industrial and any other special use properties in the area;
 - (b) Document the land valuation tables and unit costs by including statistical testing to compare the calculated preliminary land value to the sale properties to ensure accuracy before the land valuation tables and unit costs are implemented;
 - (c) Document the development of the units of comparison that shall be used for the base land prices, which may include, but not limited to: site; front foot; square foot; front acre; rear acre; and, other appropriate units of comparison;
 - (d) Document site specific characteristic land adjustments, which may include, but not be limited to: topography; view; size; location; and, access; and.
 - (e) Document the calibration of land tables and models.

- (2) In developing building cost tables, Contractor shall provide the following:
 - (a) Investigate, with documented analysis, the building costs of residential, commercial, industrial and any other special use properties in the area;
 - (b) Document the testing of Contractor's building valuation tables and unit costs by comparing the calculated preliminary building value to the sale properties, for which the building costs are known, to ensure accuracy before the building valuation tables and unit costs are implemented;
 - (c) The building cost tables shall consist of unit prices based upon relevant factors, which may include, but not be limited to: specifications for various types of improvements; the quality of construction; the building customs and practices in Municipality; various story heights and square foot areas adequate for the valuation of all types of buildings and other improvements to the land; tables for additions and deductions for variations cost improvement from the base specifications; and, tables for depreciation based upon age and condition of improvements.
 - (d) Document the calibration of all building cost tables and models.

3.4.3 Income Approach:

- (1) The income approach, when utilized, shall be implemented by calibrating and applying valuation models as follows:
 - (a) Investigate and qualify, with documented analysis, market data, which may include but not be limited to: rental income; expenses; vacancy; and, capitalization rates for: residential, commercial, industrial and any other special use property;
 - (b) Describe property specific characteristics;
 - (c) Document statistical testing for the income valuation models to known sales of similar properties;
 - (d) Create valuation models consisting of market data based upon:
 - (i) Defined descriptions and specifications based upon property type; and,
 - (ii) Quality and size of the improvements; and,
 - (e) Document the calibration of all income approach valuation tables and models.

3.4.4 Market-Sales Comparison Approach:

- (1) The market-sales comparison approach, when utilized, shall be implemented by calibrating and applying valuation models as follows:
 - (a) Contractor shall qualify, analyze, and use sales as direct units of comparison in the valuation of residential, commercial, industrial and any other special use properties;
 - (b) Investigate with documented analysis comparable sales;
 - (c) Document the adjustments for specifics, which may include, but not be limited to: location; time; size; features; and, condition;
 - (d) Document how the adjustments were derived;
 - (e) Document final value reconciliation; and,
 - (f) Document calibration of all sales comparison tables and models.

3.4.5 In the utilization of the appraisal approaches to valuation, Contractor shall make and document adjustments made to properties for depreciation factors, which may include, but not be limited to: physical; functional; and, economic conditions.

3.5 Full Statistical Revaluation Value Notification and Informal Reviews

3.5.1 Contractor shall provide to the municipal assessing officials:

- (1) A list of the newly established values for review;
- (2) A preliminary value analysis with a copy delivered to the DRA for review; and,
- (3) The informal review schedule in advance.

- 3.5.2 Contractor shall mail, first class, to all property owners, the notification of the newly established value of their property by sending to the property owner either of the following:
- (1) A list of all property owners containing the newly established valuations of all properties within Municipality; or,
 - (2) A letter to the owner stating the newly established value of their property and whether Contractor has either:
 - (a) Published a list of all property owners containing the newly established valuations for all properties within Municipality in an identified newspaper of general circulation for the entire Municipality; or,
 - (b) Posted in two (2) identified public places within Municipality a list of all property owners and the newly established values of the entire Municipality.
- 3.5.3 The notification of newly established values shall contain the details of the informal review process, instructions on scheduling an informal review; and the time frame in which informal reviews shall be scheduled.
- 3.5.4 The notification of newly established values shall contain instructions in regard to the appeal process for abatements pursuant to RSA 76:16, RSA 76:16-a and RSA 76:17.
- 3.5.5 After mailing or posting of the notification of newly established values, Contractor shall ensure that an informal review of the newly established property values is provided to all property owners who may, within the time prescribed by the contract, request such a review.
- 3.5.6 Notwithstanding Section 2.6 of this contract (Confidentiality), Contractor shall make available to all property owners the property record card related to their newly established property value(s).
- 3.5.7 Contractor shall notify, by first class mail, all property owners addressed during the informal reviews and indicate whether or not a change in value resulted and the amount thereof.
- 3.5.8 All documentation utilized or obtained during the informal review process and a list of final values shall be delivered to the municipal assessing officials.
- 3.6 Appraisal Manuals and Full Statistical Revaluation Appraisal Reporting**
- 3.6.1 Contractor shall provide a data collection manual, to be included within the USPAP report, or as a separate document, which shall include but not be limited to:
- (1) A description of building characteristics; extra features; outbuildings; site improvements; site characteristics; road frontage; water frontage; water access; topography; and view;
 - (2) A glossary and description of all codes used within the data collection and on property record cards;
 - (3) A description of all grading factors utilized, which may include, but may not be limited to: condition factors; quality; depreciation; amenity values; and other factors or conditions; and,
 - (4) A glossary and description of the coding used for visitation history.
- 3.6.2 Contractor shall ensure that the municipal assessing officials have:
- (1) A technical CAMA manual detailing the CAMA system utilized; and,
 - (2) Been provided training in the proper use of the CAMA system.
- 3.6.3 Contractor shall provide a USPAP compliant appraisal report pursuant to RSA 21-J:14-

b.1.(c): The report shall comply with the most recent edition of the USPAP Standard 6. The report shall contain, at a minimum, the following:

- (1) A letter of transmittal to include a signed and dated certification statement;
- (2) Sections detailing:
 - (a) The scope of work;
 - (b) The development of values;
 - (c) Time trending analysis;
 - (d) Land and neighborhood data;
 - (e) Improved property data;
 - (f) Statistical testing, analysis, and quality control; and,
 - (g) The development of approaches to value used in the revaluation of properties.
- (3) Appendices which may include, but not be limited to:
 - (a) Work plan;
 - (b) Neighborhood maps;
 - (c) Names and levels of DRA-certified individuals authoring or assisting with the development of the USPAP compliant report;
 - (d) CAMA system codes;
 - (e) Identification and description of zoning districts;
 - (f) Qualified and unqualified sale codes; and,
 - (g) Other useful definitions or information.
- (4) Instructions, or as a separate document, adequate instructions for the municipal assessing officials to:
 - (a) Understand the valuation methodologies employed;
 - (b) Understand the market and neighborhood adjustments; and,
 - (c) Understand the conclusions of the appraisal report.

3.6.4 Contractor shall provide a USPAP compliant report to the municipal assessing officials, to be retained by the municipal assessing officials until the next revaluation and a copy to the DRA.

3.7 Full Statistical Revaluation Defense of Values

3.8.1 Contractor shall, after the final property tax bills have been mailed by Municipality, support and defend the values that were established by Contractor for the year of the revaluation as follows:

- (1) At no additional cost to Municipality, property tax abatement requests that are timely filed with Municipality pursuant to RSA 76:16 shall have:
 - (a) A review, by either a DRA-certified property assessor or a DRA-certified property assessor supervisor; and,
 - (b) The Contractor's written recommendation provided to the municipal assessing officials which an abatement request had been received.

3.7.2 Contractor shall provide a qualified representative for the defense of property tax abatement appeals that are timely filed with the Board of Tax and Land Appeals (BTLA) or Superior Court pursuant to RSA 76:16-a and RSA 76:17, whose compensation has been agreed upon by the parties to the contract as stipulated in Section 2.7; and,

3.7.3 Appeals to the BTLA or Superior Court:

- (1) Contractor will support and defend values established by Contractor that may have been lowered by municipal assessing officials but shall not be required to support or defend values that have been increased by the municipal assessing officials.

3.7.4 All documentation utilized or obtained during the defense of assessed value process shall be relinquished to Municipality.

ADDITIONAL SCOPE OF WORK

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1. Participate in a start-up meeting with the City and DRA.
2. Complete callbacks to maximize the entry rate.
3. Update images for each property.
4. Complete data entry at every stage of the project.
5. Analyze all Residential qualified sales for a period of one year prior to the assessment date of April 1, 2022.
6. Analyze all Commercial/Industrial/Apartment qualified sales for a period of one year prior to the assessment date of April 1, 2022.
7. Complete an analysis of all returned Income and Expense Statements and input data to create market rents, expenses and vacancies.
8. Update all land, building and depreciation tables as required by sales analysis, Income and Expense Surveys and the Marshall & Swift cost manuals.
9. Generate cap rates using the latest publication of investor surveys and those extracted directly from the market.
10. Reconcile cost and income values to within 10% of each other.
11. Field review all properties in the field.
12. Update the use of the effective year built consistently throughout the City.
13. Submit all final values to the City for review.
14. Post all values on Company website, on the City of Nashua website and on one additional public place to be determined by the City.
15. Mail notices and conduct informal hearings for City taxpayers to discuss their assessment.
16. Work closely with the City at all stages of the update to ensure a successful project.
17. The Company that executes a Contract with the Municipality will furnish all labor, materials, supplies and equipment, and should perform all work for the project in strict accordance with the contract specifications and should be in compliance with the State of New Hampshire Department of Revenue Administration Administrative Rules governing revaluations and any relevant applicable rules and standards as adopted by the Assessing Standards Board.
18. All Company field personnel should carry suitable ID cards, which should include an up-to-date photograph, supplied by the Company and signed by the Governing body.
19. Each proposal shall address the proposed methodology, personnel, and philosophy, including the use of effective year built as opposed to grade, condition and other factors in applying depreciation.
20. Progress meetings shall be held bi-weekly throughout the duration of this contract.

PROPOSAL.

The Proposal response should be fully self-contained, concise, and display clearly and accurately the capabilities, knowledge, experience, and capacity of the Proposer to meet the requirements of the project and the RFP. Proposers are encouraged to utilize methods they consider appropriate in communicating the required information. At a minimum, this will include submission of the information requested below:

- A. Firm description and project team
 - a. Firm name, business, address, website address and contact information
 - b. Year established, number of employees, office locations, etc
 - c. Consultant specialties: list your firms area(s) of expertise
 - d. Identify a project manager and provide their direct contact information
 - e. List lead professional staff by area of expertise and provide resumes for key project personnel
 - f. Identify subcontractors or partners.
- B. Relevant experience
 - a. Give examples of at least 3 current or recently completed similar projects.
- C. Approach to completing Scope of Services
 - a. Describe, in detail, how your firm would approach this project, and why you are particularly well suited to complete the scope of work.
- D. Proposed fee
Please provide a detailed proposed fee for the project and a description of services provided for this cost.
- E. References
 - a. Please provide 3 references (name of contact person, phone number, and email) for persons for whom you recently completed similar services.

EVALUATION PROCESS

- A. Proposals shall be evaluated by specific criteria set forth in this RFP. All Proposals considered responsive shall be evaluated for completeness of data provided, support for all claims made, and the overall approach taken. The objective is to select a Proposer, through the outlined evaluation process, whose Proposal is judged to be in the best interest of the City of Nashua.
- B. Selection Criteria:
The Proposer selected for a contract will be the Proposer who's Proposal, as presented in response to this RFP, is the most advantageous to the City of Nashua. The City of Nashua is not bound to accept the lowest priced Proposal if that Proposal is not in the best interest of the City of Nashua as determined by the City of Nashua. The City of Nashua reserves the right to accept or reject any and/or all offers, to waive any and/or all formalities, to clarify any discrepancies in the Proposal and to award a contract in the best interest of the City of Nashua.

The following criteria will be used to evaluate, rate, and rank the proposals received. The City may choose to interview the top firms following ranking or immediately select a firm from the proposals submitted.

1. Qualifications and experience of project team
2. Past performance and service on similar projects
3. Proposed approach to scope of work
4. Overall quality of proposal
5. Cost