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SECRETARY OF  
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BOARD OF REVISION

ADMINISTRATOR  
DATA PROCESSING DEPT.

**LAKE COUNTY ADMINISTRATION CENTER**

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**INSTRUCTIONS TO APPRAISAL CONTRACTORS**  
**PROPERTY REAPPRAISAL PROGRAM FOR LAKE COUNTY**  
**TAX LIEN DATE JANUARY 1, 2024**

Sealed proposals will be accepted at the offices of the Lake County Auditor (the Auditor), 105 Main Street, Painesville, Ohio, until 10:00 A.M. on the 28th day of January 2022, for the reappraisal of real property located within Lake County, as detailed in these specifications.

**1. SUBMISSION OF PROPOSALS**

- 1.1 Envelopes containing proposals must be sealed and marked on the face with the name and address of the Contractor and the words **"2024 Sexennial Reappraisal - Lake County."**
- 1.2 Any proposal received after the above stated time shall be returned to the Contractor unopened. This applies both to proposals sent by mail and those delivered in person.
- 1.3 Any Contractor may withdraw their proposal by written request at any time prior to the time set forth above to receive proposals.
- 1.4 No proposal may be withdrawn for thirty (30) working days on or after January 28, 2022 at 10:00 A.M.
- 1.5 Any negligence by the Contractor in preparing the proposal confers no right for the withdrawal of the proposal after it has been opened. The County shall not be responsible for mathematical errors in the Contractor's proposal.
- 1.6 Contractors are invited to submit additional proposals which deviate from these specifications. Contractors shall clearly label such additional proposals as **"Alternatives"** and clearly set forth the differences between their basic proposal and their alternatives. All contractors who desire to be considered as a potential contractor for this revaluation program shall, however, submit a proposal which conforms to the specifications as developed by the Auditor and will encompass all classes of property.
- 1.7 The attached Proposal Submission Worksheet shall be utilized by any Contractor wishing to submit a proposal.

**2. PARCEL COUNT**

Lake County has the following approximate total parcel count by property class (per the TY 2020 abstract):

Agricultural	1,688
Commercial	5,615
Exempt	4,323
Industrial	1,982
Manufactured Homes	2,103
Public Utility	209
Residential	<u>96,754</u>
<b>Total</b>	<b>112,674</b>

**3. RIGHT TO REJECT PROPOSALS**

The Auditor reserves the right to reject any and/or all proposals and to waive any informality or technicality in the proposal and to accept other than the lowest proposal by accepting that responsible proposal which the Auditor deems to be in the best interest of the County. The Auditor shall be the sole judge of whether a Contractor has or has not met the requirements of this Request for Proposal.

**4. EXAMINING PROPOSED PROJECTS**

All contractors are advised to inspect the proposed project site for physical and economic conditions, the maps and records in the Auditor's Office and other County offices and judge for themselves the circumstances affecting the cost of the project and the staff and facilities which would be necessary for completion of the project in the allocated time. The county supervisory appraiser will make himself available for interview regarding any issues or concerns to be addressed for the reappraisal. Failure to conduct such an inspection does not in any way relieve the successful Contractor of the obligation to carry out the provisions of the specifications contained herein and to complete the contemplated work for the consideration set forth in the proposal.

**5. PURPOSE OF REVALUATION**

5.1 It is the purpose and intent of this proposal that Lake County shall receive a complete reappraisal of all parcels of real property and manufactured homes which shall conform to generally accepted standards within the mass appraisal industry and shall also conform to the Constitution of the State of Ohio, the laws

contained in the Ohio Revised Code, and also the rules and regulations as established by the State of Ohio for revaluation programs.

- 5.2 The value estimates prepared for each parcel of property or registration shall be at its true cash value or at its fair market value as defined by Ohio Administrative Code 5703-25-05 Definitions.
- 5.3 The effective date of this appraisal for all real property values shall be January 1, 2024, as the tax lien date and all work shall be completed no later than February 28, 2024. The effective date of appraisal for manufactured homes is October 30, 2023 and all work shall be completed no later than November 31, 2023 for manufactured homes.
- 5.4 The Contractor's role shall be to assist the Auditor in establishing an estimate of the true cash value or market value of real estate for the preparation of ad valorem tax assessments as provided by the Ohio Revised Code. All final estimates of value and final decisions pertaining to the fair market value shall be the responsibility of the Auditor and nothing in these specifications or in the Contract is to be construed or interpreted as usurping this authority and responsibility.

## **6. SCOPE OF APPRAISAL SERVICES**

- 6.1 It shall be the responsibility of the Contractor and its supervisory personnel to plan, initiate, and complete the reappraisal of all parcels of real property using accepted mass appraisal methods and cost-effective procedures to produce defensible estimates of value.
- 6.2 Improved parcels, for the purpose of this Contract, shall consist of property and the actual measurement and listing of construction characteristics in order to estimate its market value.
- 6.3 Unimproved parcels, for the purpose of this Contract, shall consist of parcels of land which are not improved with dwelling structures or other building or yard improvements which require actual measurement and listing of construction characteristics for valuation purposes.
- 6.4 The Contractor shall be guided by the Ohio Constitution, the Ohio Revised Code, the administrative rules as promulgated by the Tax Commissioner and the Standards for the Mass Appraisal of Real Property and the Standard on the Application of the Three Approaches to Value in Mass Appraisal as developed by the International Association of Assessing Officers, as well as generally accepted mass appraisal procedures.

- 6.5 The Project Manager will have the Ohio Department of Taxation (ODT) requisite coursework for mass appraisal project management as outlined in R.C. 5713.012.

## **7. PERSONNEL**

- 7.1 The revaluation program is of major importance to this County and therefore, it requires the Contractor to provide personnel with experience and knowledge in the various types of property which one would encounter in the valuation of this county.

This Contract shall not be construed as an agreement to furnish an appraiser or consultant to supervise inexperienced personnel in the reappraisal of real property. It shall, however, be construed as a contractual agreement for the Contractor to furnish qualified, professional appraisers and thoroughly indoctrinated technicians employed by said Contractor to comply with the standards and specifications contained herein.

- 7.2 Professionally qualified personnel sufficient to ensure the satisfactory completion of this contract in accordance with the standards, specifications, and phased delineation time frame contained herein shall be assigned to this project by the Contractor.
- 7.3 The Contractor shall use, in the completion of the project, employees of good character. All employees shall have sufficient aptitude, training, and familiarity with Ohio systems and procedures as well as the experience to carry out the work assigned to them and shall not be under the age of eighteen (18). The employees of the appraisal firm shall be appointed deputies of the Auditor for the purpose of the reappraisal as well as acting as agents for the appraisal firm. Contractor's employees are subject to background check.
- 7.4 The Contractor, upon written notice from the Auditor, shall remove any person or persons that the Auditor considers to be incompetent or negligent in the performance of their duties or who shall be deemed to be guilty of misconduct.
- 7.5 All employees of the Contractor shall not wear any clothing or other item(s) which are stained, torn or revealing. In addition, clothing with lettering, pictures, and/or symbols, etc. that may be considered offensive in nature (i.e. references to race, creed, politics, drugs, sex, etc.) is strictly prohibited. All employees of the Contractor, including those assigned to field data collection work, are required to wear appropriate footwear at all times. All employees of the Contractor shall maintain sufficient personal hygiene and grooming so as not to become offensive to fellow employees of the Contractor and/or the Auditor's Office and/or the general public with whom they may come in contact. The Contractor, upon written notice from the Auditor, shall remove any person or persons that the Auditor considers to be not in compliance with this requirement.

- 7.6 The Contractor shall provide proper identification to all employees who, by reason of their work, shall be in contact with the general public or with the staff of the Auditor's Office. Identification badges, in addition to the usual information, shall contain a photograph of the employee. Such identification must be clearly displayed on outside clothing of all personnel during field work and readily visible when in the Auditor's Office.
- 7.7 Each vehicle used for field work by the Contractor and their employees shall be in a condition that:
- would not cause physical damage to visited properties;
  - does not produce excessive noise, smoke or odors due to faulty exhaust systems or other mechanical defaults; and
  - is free from any lettering, stickers, posters, pictures, and/or symbols, etc. that may be considered offensive in nature (i.e. references to race, creed, politics, drugs, sex, etc.).
- 7.8 All vehicles shall be clearly identified with signs located on the sides of each vehicle which show the fact that the vehicle is being used in conjunction with a county reappraisal program. The wording of such signs shall be approved by the Auditor before being utilized.
- 7.9 The Contractor shall designate a qualified and responsible person on-site to closely supervise the operation of the Contractor's staff throughout the entire project. The individual designated as such shall be on-site at the County for no less than seventy-five percent (75%) of the duration of the project and available to the Auditor for consultation, instruction, and training throughout this project.
- 7.10 The Contractor's services, facilities, and employment opportunities shall be available equally to all persons without regard to race, color, sex, creed, age, religion, or national origin.
- 7.11 The Contractor shall notify the Auditor in writing of any changes in supervision or of key personnel during the entire life of this project. This notice shall include the reason for the change and provide a plan for an immediate replacement or suitable remedy.
- 7.12 All appraisal work of any kind, type, or description shall be coded to allow the identification of the employee of the Contractor carrying out that task so that problems can be readily identified.

## 8. QUALIFICATIONS

- 8.1 All Contractors who desire to submit a proposal shall be listed on the Tax Commissioner's entry and be authorized to conduct mass appraisals within the State of Ohio. Each Contractor submitting a proposal must have completed at least one sexennial reappraisal of a County with at least 50,000 parcels within the last ten (10) years.

Further, the Contractor shall submit with the proposal evidence, which is satisfactory to the Auditor, that said Contractor has the necessary experience, ability, facilities, and resources to meet all conditions and requirements set forth in these specifications. The Contractor shall include the following as an integral part of its proposal.

- 8.1.1 The Contractor shall provide a client list of at least the past five years of all similar previous and current contracts, if any, which were awarded to the Contractor by a governmental agency. The Contractor shall include the following information pertaining to each of the reappraisal contracts listed:

- a) contract duration, including dates;
- b) geographic area served;
- c) number of parcels appraised; and
- d) methods used for the project (manual data collection or automated data verification (photographic/sketch validation etc.)).

- 8.2 The Contractor shall include in the proposal an organizational chart detailing the line of responsibility, the associated position description of personnel who are assigned to the work in this organizational structure, and the approximate number of days each shall be engaged in the project on the project site. The Contractor shall keep the organizational chart current and provide the Auditor with updates immediately as changes occur.

- 8.3 The Contractor shall include in the proposal resumes of all key personnel who will work on this project and their projected duties associated with the project, including a listing of prospective project supervisory personnel who may be assigned to this project.

- 8.4 Within twenty (20) days after the awarding of the Contract, the Contractor shall submit to the Auditor resumes of all appraisal, supervisory, and managerial personnel assigned to this project within the organizational structure as required above.

- 8.5 The Auditor shall look to the Contractor's expertise and capability to provide the personnel satisfactory to carry out this proposal, but shall look to the following general qualifications as the standard against which to measure proposed personnel for assignment to this revaluation program:
- a) any principal supervisor or officer assigned to the mass appraisal program shall have five (5) years of practical mass appraisal experience in jurisdictions similar to this one and previous experience as a project supervisor on at least two (2) other projects of at least 50,000 parcels each;
  - b) individuals assigned to supervisory responsibilities or as principal appraisers of residential and agricultural property shall possess not fewer than three (3) years of practical mass appraisal experience in this area;
  - c) individuals assigned to supervisory responsibilities or as principal appraisers of commercial and industrial property shall possess not fewer than five (5) years of practical mass appraisal experience in this area; and
  - d) any individual assigned to measuring and data collection responsibilities in residential and agricultural property shall have a minimum of two (2) weeks of classroom and supervised field training before such individuals may begin work within this county and on this project; this may be excused if said individuals possess the experience listed in 8.5(b).
- 8.6 Any Contractor submitting a proposal shall agree that prior to the acceptance of any proposal, the Auditor may ask that Contractor to supply additional information as may be considered pertinent to the acceptance of this proposal.
- 8.7 The Auditor reserves the right to refuse any personnel.

## **9. INTERPRETATION**

- 9.1 No interpretations of the meaning of these specifications will be made orally to any Contractor.
- 9.2 Any request for interpretation shall be made in writing, addressed to the Lake County Auditor, 105 Main Street, Painesville, Ohio 44077 or by email to mpennell@lakecountyohio.gov. To be given consideration, the request must be received at least ten (10) days prior to the last day for receiving proposals.
- 9.3 Any and all such interpretations and any supplemental instructions which the Auditor may issue shall be in the form of a written addendum to the specifications and, if issued, shall be sent to all parties who have received such specifications.

## 10. NEIGHBORHOOD ANALYSIS

- 10.1 The Contractor shall develop a comprehensive neighborhood analysis system for Lake County as an integral part of the revaluation program.
- 10.2 The Contractor shall analyze the physical, economic, governmental, and social characteristics within the County to recognize changes to define the unique market neighborhoods within this County. The procedures and forms to be utilized in the definition of each neighborhood shall be presented to the Auditor before such procedures are implemented. All neighborhoods will be analyzed to determine if any further delineation is warranted. ***Any and all changes to neighborhoods must be approved by the Auditor's Chief Deputy Auditor prior to the change being made.***
- 10.3 Neighborhoods shall be defined by natural, man-made, or political boundaries and established by commonality based on land uses, types, age of buildings and population, homogeneity, and other similar factors.
- 10.4 Whenever practical, like neighborhoods should and may be combined to result in a better sales sample so long as the properties being grouped are homogenous. The Lake County's Chief Deputy Auditor must approve all such changes to neighborhood delineations.

## 11. SALES DATA

The Contractor and the Auditor shall cooperate to exhaust all available sources to collect and validate sales data for every property within the county which has been sold since January 1, 2023. The sales shall be carefully reviewed to eliminate any transfers which are not found to be true "arms-length" sales involving excessive personal property and sales under distressed conditions. If it is mutually agreed upon by both the Auditor and the Contractor to utilize a questionnaire to validate sales, the format of such questionnaire must be approved by the Auditor prior to its utilization.

## 12. APPRAISAL OF LAND

- 12.1 The Contractor shall analyze the physical, economic, governmental, and social characteristics within the County that impact land values. Each neighborhood within the County and the sales therein shall be considered in the valuation of land.
- 12.2 An estimate of the "true cash value" shall be prepared for the land portion of each parcel and shown separately from improvement values. A detailed study of current land values shall be made by the Contractor's supervisory staff and/or qualified appraisers. The sales data covering fair market sales of vacant land in all property classifications shall be secured from all available sources and shall



be compiled, verified, and analyzed for use in the valuation of land in relation to the indicated unit(s) of comparison throughout the county. Although emphasis shall be placed upon the sales comparison approach in the estimate of market value of land, other customary processes such as abstraction, allocation, and the capitalization of ground rent may be utilized.

- 12.3 The contractor shall carefully consider and make appropriate adjustments for all factors affecting the value of land, based upon the current use of the land, such as but not limited to; zoning, location, shape, size, topography, flooding, access to railroads, roads, waterways, utilities available to the property, and situations where the home site is located on multiple parcels. All land shall be valued as vacant.
- 12.4 The Contractor shall ascertain from the marketplace the appropriate unit(s) of comparison in terms of which land is bought and sold and to the extent practical, land value computations shall be made in accordance with one of four categories as follows:
  - a) residential - front foot values, square foot values, acre values or site (unitized) values;
  - b) commercial - front foot values, acre values or square foot values;
  - c) industrial - square foot values, front foot values or acre values; and
  - d) rural, residential & agricultural - acre values or front foot values.
- 12.5 Agricultural land shall be classified and appraised according to its true cash value and in addition thereto, valuations shall be established for each parcel of land devoted to agricultural use upon the basis of the table provided by the Tax Commissioner.
- 12.6 The Contractor will provide all data and information necessary for the County to work with their CAMA vendor for any and all land pricing tables (un-factored) utilized in the County's computerized appraisal software.
- 12.7 All base land values shall be computed, using the applicable front foot, square foot or acreage value, on a neighborhood-by-neighborhood basis.
- 12.8 The individual land characteristics and influence factors on each parcel shall be recorded on the appropriate fields of the data collection card and carefully checked for accuracy.
- 12.9 All percentage adjustments related to land influence factors, whether currently existing or proposed, shall be reviewed by qualified appraisers and supported by documentation and informed judgment.

- 13.0 The county has areas where home sites are over 1 acre. In order to best accomplish assessment functions, a home site must not be more than one acre. The Contractor is responsible for correcting any and all home sites so that they do not exceed (1) acre and the land pricing for residual land is appropriately repriced as necessary. The Contractor will work with the county's Chief Deputy Auditor to identify, correct, and perform quality control in the form of queries to ensure that home sites are corrected as outlined above.
- 13.1 Lakefront/waterfront land shall be appraised in a consistent manner with appropriate attention to such factors as erosion, and land that is underwater. Lake County has approximately 31 miles of shoreline along Lake Erie as well as property along the Grand and Chagrin Rivers, as well as tributaries.
- 13.2 City lots where an economic unit is comprised of more than one lot shall be appropriately valued with emphasis on the lot containing improvements and less weight given to excess lots. The Contractor will remedy the land to building ratios in the aforementioned communities where the ratio is greater than 1:2
- 13.3 Parcel splits and combinations shall be appraised by the county Appraisal Department.

### **13. IMPROVED PROPERTY**

13.1 The Contractor shall maintain a high degree of accuracy in the data collection of property characteristics.

- a) Objective property characteristics shall be at least ninety-five percent (95%) accurate for each field on the data collection card. Measurement data is expected to be within one (1) foot of actual dimensions and within five percent (5%) of the actual area.
- b) All subjective evaluations shall be made in a uniform and consistent manner to all sold and unsold properties in the County. Comprehensive documentation shall be provided to convincingly support any alterations proposed to account for local market conditions. All documentation shall be a project deliverable and submitted to the Auditor for approval prior to the start of the final review phase of the project. All property characteristics considered in the application of subjective percentage adjustments shall become part of the County's standard data set. All such property characteristics shall be identified, collected, and recorded on the data collection form during the data collection phase of the project. All subjective percentage adjustments shall be supported by a formal market analysis of the local influences of such characteristics on sale prices of property. The formal market analysis shall become a project deliverable to the Auditor. All subjective factors and adjustments shall be made and recorded by qualified appraisers only.

- 13.2 In arriving at the value of each parcel of improved property, it shall be the responsibility of the Contractor to consider all three approaches (cost, sales comparison, and income) to value where applicable. Income data should be obtained from property owners as well as from recent Board of Revision case files where available.
- 13.3 The Contractor shall make a careful investigation of the replacement cost of buildings in order to arrive at a time and location construction index required to calibrate the cost system for the County and will work with the CAMA vendor as necessary. The Contractor shall provide all necessary documentation and statistical analysis to support the conclusions drawn from the study.
- 13.4 The Contractor shall study and analyze the useful life expectancies and observe the condition, desirability, and utility (CDU) of recently sold buildings in the preparation of depreciation schedules. The Contractor shall provide all necessary documentation and statistical analysis to support all schedules.
- 13.6 ALL current effective ages and overridden depreciation factors/adjustments will be removed from the county's CAMA data in order to reset the cost system to base. New effective ages will be determined by the vendor on final review with increments of 5-10 years only in order to fine tune individual parcels as necessary.
- 13.7 The excessive use of factors to increase/decrease values IS HIGHLY DISCOURAGED. The Contractor shall make every effort to use condition, effective age, and the consistent use of grade/CDU in order to fine tune parcel values rather than imbed factors in the cost approach. Factors should be left for adjusting entire neighborhoods.
- 13.6 All schedules and indexes, as developed, shall be subject to the approval and specifications of the Auditor and county supervisory appraiser.
- 13.7 New construction and improvements under construction or partially complete at the time of inspection shall be coded as such for future retrieval by the Auditor's Appraisal division.

#### **14. RESIDENTIAL PROPERTY AND MANUFACTURED HOMES**

- 14.1 The Contractor shall inspect the exterior of each structure. Interior data shall be obtained through personal interviews and questionnaires requesting this information (A minimum of 10% on-site signatures is required of each data collector). Construction features, characteristics, attachments, accessory buildings and yard improvements for each property shall be recorded on the data collection form in the fields provided. Construction quality grade shall be distinctly considered. Periodic inspection of work of all appraisal personnel shall be made by the Contractor's on-site supervisor to ensure correct, uniform and consistent application of grade classification.

The following is a listing of the **minimum** data elements/characteristics required to be obtained for each parcel during field work inspections:

## Residential Data / Characteristics

Parcel Number	
Property Address	
Land Use Code	
No. of Living Units	Qty.
Neighborhood No.	
Topography	To Street/Parcel Land/If Flood Plain
Utilities	Types
Roads	Paving Type/Sidewalk
Traffic	Degree at Parcel
Frontage	Street Use
Locate	Area Use
Parking	Type/Quantity/Proximity
No. of Misc. Bldgs.	
Topography	Buildable/Unbuildable
Landscaping	Quality

### LAND

Lot Pricing:	
Code	Type of Lot
Actual Frontage	
Effective Frontage	
Effective Depth	
Unit Price	
Influence Factor Code #1	
Influence Factor Code #2	
Influence Factor %	

Acreage Pricing:	
Code	
Acres	
Unit Price	
Influence Factor Code #1	
Influence Factor Code #2	
Influence Factor %	

BUILDING DATA

Card Number		
Story Height		
Construction	Type	
Style		
Year Built		
Effective Year	Use in 5-10-year increments	
Remodeled Year		
% Remodeled		
Total Rooms	Quantity	
Bedrooms	Quantity	
Family Rooms	Quantity	
Full Baths	Quantity	
Half Baths	Quantity	
Additional Fixtures	Quantity	
Kitchen Remodeled	Y or N	
Bathroom Remodeled	Y or N	
Basement	Size	
Heating	Type	
Heating Fuel	Type	
Heating System	Type	
Attic	Finish	
Physical Condition	Grade	
Int. vs. Ext. Condition		
Unfinished Area:	Width	Length
Recreation Room:	Width	Length
Finished Basement Living Area:	Width	Length
WBFP Stacks	Quantity	
Openings	Quantity	
Prefab. Fireplace	Quantity	
Basement Garage # Cars	Quantity	
Miscellaneous Description	Other special features / Quantity	
Condominium Level		
Condominium Type	Location within unit	
Foundation	Type	
Unfinished Area	%	
Class	Type	
% Exemption		
Grade		
CDU		
Depreciation Override	Discouraged unless necessary	
Cost & Design Factor		
% Complete		

## OTHER BUILDINGS AND YARD ITEMS

Card	
Line	
Code	Type of OBY
Year Built	
Effective Year	
Year Remodeled	
Width	
Length	
Grade	
Mod Code #1	
Mod Code #2	
Mod Code #3	
Mod Code #4	
Condition	
Function	
% Good	
No. of Units	

- 14.2 A proportional perimeter sketch of each residential dwelling/manufactured home and/or attached accessory building not currently on the data collection form shall be drawn in the grid space provided on the data collection form and all necessary dimensions and identification symbols shall be placed on this sketch. All attachments such as garages, porches, and carports shall be clearly shown, dimensioned, and labeled. Other structures and yard improvements of contributory value shall be measured, listed, valued and recorded on the appropriate parcel where they are physically located as opposed to the home site parcel. Exterior dimensions shall be rounded to the nearest foot. When the dwelling is too large or complex to be sketched on the data collection form, a separate sketch shall be made and attached to the card. All building and structure dimensions required for listing the improvements on the data collection card shall be verified or obtained by the Contractor.
- 14.3 Depreciation shall be estimated based on the age, physical condition, functional utility, locational obsolescence and all other factors which may result in loss of value. It shall be the responsibility of the Contractor to consider each and all types of depreciation in a meticulous and uniform manner. Periodic inspection of depreciation applications shall be made by the on-site supervisor to ensure the proper and uniform application by qualified appraisers.

14.4 During the field listing and verification portion of data collection, an interview with the dwelling occupant shall be conducted in a courteous and professional manner to verify required construction data. An alternative data verification procedure may be instituted under the following conditions:

- a) no one responds to the data collector's knock on the door;
- b) a minor respond to the data collector's knock on the door and an adult is not available to answer questions;
- c) the occupant does not wish to answer questions at the time of the inspection; or
- d) the occupant is not capable of answering the questions.

14.4.1 The Contractor shall be responsible for providing a postage paid door hanger, questionnaire or information card as an alternative data verification procedure. The Contractor may also set up and utilize an online or e-mail system to collect data from owners. The communication form shall be designed by the Contractor and approved by the Auditor prior to its use. The information content shall contain a brief explanation of why the card was left, as well as the address, telephone number, and/or e-mail address of the Contractor. The occupant of the residence shall have the option of returning the completed questionnaire by mail, providing the contractor with the needed data over the telephone, by e-mail, or requesting that a data collector return to the property on an appointment basis. The Contractor shall be responsible for all costs relating to communicating with the property owners therein. The Contractor shall number each of the door hangers, questionnaires, or information cards left and any cards left shall have that number posted to the data collection form.

14.4.2 The Contractor shall be responsible for delivering a bi-monthly report (or as determined by the Auditor) to the Auditor during the data collection phase of the project which shall show the total number of properties in which the data collector has gained entry, the total number of information cards left, and the total number of informational cards returned by taxing district.

14.5 The name and relationship to the property of the person interviewed along with the time and date of inspection shall be noted on the data collection card. When appropriate, the data collector will ask the person interviewed to sign the data collection sheet, indicating the data collector was on-site. A minimum of 10% on-site signatures is required of each data collector.

14.6 If the residence is vacant or permission to inspect the exterior is denied, the data collector shall estimate the data based upon previous appraisal information and comparable properties in the neighborhood. A full explanation of the denial shall be recorded on the data collection card.



14.7 All manufactured homes whether in a manufactured home park or on individual parcels shall be viewed and valued. The Auditor's Office will provide property record cards for all manufactured homes. The Contractor will be responsible for establishing a cost schedule in the County's CAMA system much like typical single-family residential homes.

## **15. APARTMENT PROPERTY**

15.1 All apartment properties or structures with four or more dwelling units shall be inspected and appraised from schedules and guidelines developed by the Contractor and approved by the Auditor. All building features, components, and characteristics as specified shall be identified, measured and listed. The dates and extent of all major remodeling shall be recorded in the notes section of the data collection form. Other improvements, such as paved drives, fencing, pools, patios, tennis courts, etc. shall all be identified, measured, listed and valued. The number of rental units in each building shall be verified and recorded at the time of inspection.

15.2 A site plan shall be drawn for all apartment complex parcels showing all structures and buildings in proper size and relative location, including dimensions and number of stories. A site plan will not be required for small multi-family properties where the structure type can be shown on a printed data collection form sketch grid.

15.3 The physical condition and functional utility factor for each building or structure shall be determined by qualified appraisal personnel. The application of economic obsolescence shall also be considered by the appraiser and its effect on the total improvement value shall be recorded on the parcel's data collection form.

15.4 When applicable, the three approaches to value shall be considered by the Contractor in arriving at the final estimate of true cash value. At least 2 approaches shall be performed. An income and cost approach are recommended. The Contractor is responsible for setting up the income approach within the County's CAMA. This setup includes but may not be limited to: generating potential gross income rates, vacancy and collection loss rates, expense ratios, reserves for replacement rates, and capitalization rates for utilization in the CAMA.

## **16. COMMERCIAL AND INDUSTRIAL PROPERTY**

16.1 Structural features, components, or characteristics shall be identified, measured and listed. The dates and extent of all major remodeling shall be determined and recorded in the notes section of the data collection form. Other improvements, built-in other features and attached improvements shall be identified, measured and listed.

The name of the individual who was contacted at each commercial or industrial parcel shall be listed on the data collection form or industrial write-up. This note shall include the date and time of the contact, the individual contacted, his/her title as well as the relationship to the parcel of property.

All uses of each structure type shall be determined at the time of inspection and recorded on the data collection form. Appraisal procedures of listing, measuring, and depreciating shall be set forth in a Commercial/Industrial Property Appraisal Manual to be developed by the Contractor and approved by the Auditor. The following is a listing of the **minimum** data elements/characteristics required to be obtained for each parcel during field work inspections:

**Commercial / Industrial Data / Characteristics**

Parcel Number	
Property Address	
Land Use Code	
No. of Living Units	Qty.
Neighborhood No.	
Topography	To Street/Parcel Land/If Flood Plain
Utilities	Types
Roads	Paving Type/Sidewalk
Traffic	Degree at Parcel
Frontage	Street Use
Locate	Area Use
Parking	Type/Quantity/Proximity
No. of Misc. Bldgs.	
Topography	Buildable/Unbuildable
Landscaping	Quality

**LAND**

- Land type
- Code
- Actual Frontage
- Effective Frontage
- Effective Depth
- Square Footage
- Units
- Acres
- Influence Factor Code #1
- Influence Factor Code #2
- Influence Factor %
- Override-Size
- Override-Rate
- Override-Increase

Override-Decrease  
Square Footage  
Exemption Percentage

BUILDING DATA

Card Number	
Building Number	
Year Built	
Effective Year	
Units	Quantity
Structure Code	Type of Business
Grade	
Identical Units	
Other Improvements	
Improvement Name	Name of Business/Building
Parking - Covered	Quantity
Parking - Uncovered	Quantity
Override % Good	%

OTHER FEATURES

Attributes (Porches/canopies etc.)	Dimensions or Areas
Elevator Stops	Quantity
Identical Units	Quantity

APARTMENTS

Use Type	
Number per Bldg.	Quantity
Bedrooms	Quantity
Baths - Full	Quantity
Baths - Half	Quantity
Other Fixtures	Quantity

## COMMERCIAL INTERIOR/EXTERIOR

Section	
From	
To	
Width	
Length	
Area	
Perimeter	
Use Type	
Wall Height	
Exterior Wall	Type
Construction	Type
Finish	%
Partition	Grade
Heating	Type
Air Conditioning	Type
Plumbing	Grade
Physical	Grade
Functional	
% Good	
Rent %	
Vector	
Economic Adjustment	%
Vacancy Adjustment	%
Income Override	
Expense Adjustment	%
Utility Adjustment	%

- 16.2 A site plan shall be drawn for all industrial and/or commercial sites showing all structures and buildings in proper size and relative location, including dimensions and number of stories. A site plan will not be required for commercial and industrial properties where all necessary information can be shown on a printed data collection form sketch grid.
- 16.3 The physical condition and functional utility for each building or structure shall be verified by qualified appraisal personnel. The application of economic obsolescence shall also be considered by the appraiser and its effect on the total improvement value.
- 16.4 The contractor shall collect and install into the CAMA system, rental income and expense data on all commercial/industrial properties where the income capitalization approach would be a contributing factor in estimating market value.

- 16.5 Income capitalization models shall be developed for commercial and industrial properties by use type and location (neighborhood). Current leases, rental, vacancy and expense data shall be obtained through a formal mailing of questionnaires and supplemented with tenant interviews during the data collection phase. Capitalization rates shall be derived from the local market, supplemented by published data and by the experienced and informed judgment of the Contractor's analysis. The income and expense questionnaires shall become part of the parcel's property record data base.
- 16.6 The Contractor, at the Contractor's expense, shall make a formal mailing of income and expense questionnaires to each and every owner of commercial property located within the County. Records shall be maintained of those forms which have been returned and efforts shall be made by the Contractor to obtain the highest return possible so that the model of income and expenses can be accurate and effective in the estimation of value utilizing the income approach to value. A listing must be compiled by the data collector of all tenants (business names) occupying any commercial/industrial property.
- 16.7 The Contractor shall provide all data and information necessary for the County to work with the CAMA vendor to reinstall any and all commercial/industrial pricing tables (unformatted) utilized in the County's computerized appraisal software.

## **17. AGRICULTURAL IMPROVEMENTS**

- 17.1 All agricultural structures shall be inspected and appraised from schedules and guidelines as developed by the Contractor and approved by the Auditor. Farm buildings shall be measured, listed and described individually on the data collection form and placed on the respective parcel.
- 17.2 Dwellings on farm home sites shall be drawn proportionally in the grid space provided on the data collection form and all necessary dimensions and identification symbols shall be placed on this sketch. Attachments such as garages and porches shall be clearly shown, dimensioned, labeled and sketched in relation to the home site.
- 17.3 The residential home site shall be appraised in the same manner as rural residential type parcels. The yard plot or area of land used for residential purposes shall be verified during the data collection phase.
- 17.4 All farm dwellings shall be described and valued in the same manner as other residential dwellings, utilizing the same pricing schedules used for residential parcels.

17.5 Consideration shall be given to agricultural outbuildings first individually concerning their use and adaptability and then as a group, considering the extent their presence adds to the farm value as a unit. The Contractor's appraiser is expected to exercise sound judgment in the application of functional and economic obsolescence, the objective being to arrive at a fair and equitable estimate of contributory value. It is noted that the Contractor will be responsible for determining if a structure is chattel or real estate based on the current Ohio Revised Code.

**18. SINGLE PURPOSE NARRATIVES, BUILDINGS ON LEASED LAND, EXEMPT, AND MIXED-USE PROPERTIES**

18.1 The Contractor shall prepare narrative appraisals for those limited market, special use or single purpose commercial and industrial properties. The number and content of the detailed narratives shall be determined by the Auditor. The income, cost and sales comparison shall be considered in arriving at the final estimate of property value when sufficient data is available.

18.2 Buildings on leased land shall be appraised in a manner similar to improved parcels of land. For appraisal valuation purposes, the property shall be categorized by its current use.

18.3 The Contractor shall reappraise and verify the use of all tax-exempt parcels to assist the County in making a final determination of status as of January 1 of the tax year. Exempt properties shall be appraised in a manner similar to comparable non-exempt parcels. A parsonage, for example, shall be appraised as a residence. Typically, schools, churches and other institutional buildings shall be appraised using the cost approach with appropriate market values assigned to the land.

18.4 The value of an improvement which is not distinctly and exclusively used or intended to be used for residential, commercial or industrial purposes, but some combination thereof, shall be identified on separate data collection forms. The market value of mixed-use parcels shall be based upon the highest and best use of the property as a whole. The value of such property shall be segregated for assessment classification purposes based upon the percentage devoted to each use.

## **19. PERFORMANCE STANDARDS**

19.1 By applying its mass appraisal methods and procedures to all designated parcels in the County, the Contractor shall achieve a high degree of uniformity and equitable level of valuation between properties throughout the County as of January 1, 2024. The level of appraisal accuracy and appraisal uniformity shall be measured by statistical reports to be produced by the Contractor. The Contractor, upon completion of the final review, shall submit to the Auditor results of a formal sales ratio study. In order to be in satisfactory compliance with this Contract, the following performance standards shall be met by the Contractor:

- a) the overall appraisal level of the County shall be within five percent (5%) of true cash value;
- b) among strata or classes, the appraisal level of each stratum or class shall be within five percent (5%) of the overall ratio of the County;
- c) within the single-family residential stratum, coefficients of dispersion shall be less than fifteen percent (15%) for single-family neighborhoods over fifteen years old; for single-family neighborhoods less than fifteen years old, the coefficients of dispersion shall be less than ten percent (10%);
- d) within all other classes or strata of improved property, coefficients of dispersion shall be less than fifteen percent (15%); and
- e) within all other classes or strata of vacant property including lots, farms and acreage, coefficients of dispersion shall be less than twenty percent (20%).

## **20. APPRAISAL QUALITY CONTROL**

20.1 The Contractor shall submit, as part of their proposal, a detailed quality control plan. This plan shall include, but not be limited to:

- a) the Contractor, using its own supervisory staff, shall recollect the data for, at a minimum, the first fifty (50) of improved residential parcels collected by each new data collector within ten (10) days of the date of the initial inspection; results will be provided to the county supervisory appraiser;
- b) in addition, the Contractor shall recollect, at a minimum, the first ten (10) parcels in each of the vacant land, farm, commercial, industrial, and apartment categories collected by each new data collector within ten (10) days of the date of inspection; and
- c) in all cases where an individual or a group of data collectors is collecting data erroneously due to lack of skills, the collector(s) shall be recalled for intensified retraining or termination; the work of those collectors who have been retrained shall be recollected at a frequency of two (2) out of every five (5) parcels for the next twenty-five (25) parcels within five (5) days of initial inspection; continued failure to collect data properly after retraining shall constitute cause for dismissal of the data collector; in all cases where the reason for collection differences are based on the failure of a data collector to carry out the assigned duties, that data collector will be

promptly terminated.

20.2 At any time prior to February 28, 2024 Auditor shall have the option to investigate the quality of the Contractor's effort by drawing a randomly selected sample of the data collection forms. The quality of the objective and subjective data shall conform to the stated specifications in Section 19.

20.2.1 Objective data which shall include continuous factors, quantitative and measurement data, shall meet all of the following conditions:

- a) no single, objective property characteristic field item on the data collection card shall contain inaccurate or incomplete data on more than ten percent (10%) of the parcels in the sample;
- b) no more than ten percent (10%) of all measurements required for area calculations of improvements on the data collection forms in the sample shall be missing or in error by more than one foot of the actual dimensions; and
- c) no more than twenty-five percent (25%) of all parcels in the sample shall contain errors in objective data fields on the property record documents which will result in more than a one percent (1%) difference in the total replacement cost new calculation for the improvements affixed thereto.

20.2.2 Subjective data which shall include qualitative rank, and categorical factors and percentage adjustments shall meet all the following conditions:

- a) no single property characteristic field item on the data collection card shall contain incomplete data on more than ten percent (10%) of the parcels in the schedules, tables, specifications, examples and guidelines in the application of qualitative rank, categorical factors or percentage adjustments.

20.2.3 Upon failure of the selected sample to meet any of the conditions stated in section 20.2.1 and 20.2.2, the Contractor shall immediately initiate the following procedural steps to correct the unsatisfactory quality of the data:

- a) all regular field work activities shall be immediately halted and shall not resume until the contractor completes retraining of all data collectors responsible for the errors; and
- b) the Contractor shall have one week to complete the retraining and certify to the County that the quality standards set forth in Section 20.2.1 can be met; and



20.2.4 all subjective data fields on the data collection form have been identified by the Contractor and approved by the Auditor.

## **21. USE OF COUNTY RECORDS**

- 21.1 The Auditor shall furnish to the Contractor one (1) set of the new property ownership maps of the County to be used by the Contractor to maximize efficiency during field data collection and to record new land values. In addition, all zoning maps, tax records, data and information in the possession of the County which is relevant to the work to be carried out by the Contractor under this Contract shall be made available to the Contractor.
- 21.2 No maps, data collection forms, inventory content sheets, records, forms or questionnaires shall be removed from the office in which they are stored without the prior consent of the Auditor responsible for these records. The Contractor shall, in cooperation with the County, employ a system for keeping an accurate account of all maps and records removed from the office in which they are stored. Such maps and records will be carefully preserved and will be returned to their proper storage as soon as use of same has been completed.
- 21.3 Any errors on the cadastral maps discovered in the data collection or review process shall be reported to the Auditor on a weekly basis.
- 21.4 The County shall provide updated information regarding ownership changes, parcel splits and combinations within a month of the change. These changes and updates shall be delivered to the Contractor on a weekly basis or as determined necessary by the Auditor.
- 21.5 The Auditor agrees that the Company shall utilize the County computer systems and software including, but not limited to, the County's real estate appraisal software, Smartview, their Geographic Information System (GIS) software and/or Pictometry, and its aerial photography software to complete this update and that its accessibility is an integral part of the success of this program. The County shall make the computer system and its technicians available to the company on a timely basis and both parties recognize the importance of this relationship. The Contractor shall be responsible for all data entry activities associated with this agreement.

## **22. REVIEW**

- 22.1 Prior to finalization of the valuation parameters and models, the Contractor shall conduct a one hundred percent (100%) physical review of the preliminary estimates of value prepared for each parcel of property or manufactured home registration.

The following phase work shall be completed before review documents are printed:

- a) all sales data entry shall be complete in the neighborhood being reviewed;
- b) all preliminary residential and agricultural market analysis shall be completed, tested and evaluated;
- c) all preliminary income and expense analysis shall be complete; neighborhood analysis shall be complete, pre-tested on a representative sample of parcels, and ready for printing of income analysis reports; and
- d) all local cost index and depreciation study schedules shall be completed, approved and updated.

22.2 Agricultural Use Review: The Contractor shall make a field inspection of each parcel of agricultural land in the County and determine the actual use; land in agricultural use shall be categorized as tillable, pasture, woodland, or wasteland; when a parcel of land in agricultural production contains more than one category of use, each use shall be identified along with the acreage devoted thereto.

22.3 The final office review shall be conducted by a qualified member of the Contractor's appraisal staff to develop a final opinion of market value for each parcel of property. The review process shall be used to:

- a) determine that improvements and land characteristics have been properly valued;
- b) identify any data entry or transcription errors;
- c) ensure that schedules for computing land value estimates reflect current market value and individual properties have been adjusted to reflect changes in influence factors;
- d) verify consistent and accurate grading of buildings and improvements within neighborhoods;
- e) adjust for locational obsolescence factors to better reflect market trends within neighborhoods;
- f) correlate the indicated value from the approaches used to estimate value; and
- g) ensure that each property has been valued in relation to other properties.

22.4 The appraisers assigned by the Contractor to conduct this phase of the project shall have valuation expertise and knowledge of the valuation techniques employed in the County as well as complete familiarity with the neighborhoods in the County. A minimum of 30 days of appraisal related work experience in the County must precede this person's use in the final review process.

22.5 The Contractor's review appraiser shall sign approval of all parcel values believed to be valid. If the review appraiser does not accept a value estimate, the necessary adjustments shall be made to the parcel data to bring the property value in line with true market conditions. The review appraiser shall select the sales comparison, cost, income approach, or combination of whichever is most representative of the true property value.

## **23. NOTIFICATION OF NEW VALUATIONS TO PROPERTY OWNERS**

23.1 The Auditor shall be responsible for designing, printing and mailing of a notification to all property owners. Included within the notification shall be the new assessed valuation for each respective parcel. In addition, the notification will provide to the property owner(s) the ability to respond to their new valuation via its online (Smartfile) system to the Auditor. The property owner(s) shall also be allowed to call or e-mail in to the County to ask questions regarding the notification.

23.2 The Auditor shall be responsible for logging/tracking all sent to the Auditor by the property owners in to the County's Smartfile system.

23.3 The Contractor shall be responsible for reviewing all Smartfile entries to determine if a valuation change is warranted for whatever reason(s). The Contractor shall denote the disposition of the Smartfile in the IAS system or another appropriate document as agreed upon by the Auditor and the Contractor, and the Contractor shall return all documentation to the Auditor's personnel. The Auditor's staff shall input the disposition into the IAS system in order to generate a response letter to the property owner.

## **24. INFORMAL HEARINGS WITH PROPERTY OWNERS**

24.1 The Auditor, as disclosed above, shall notify property owners of their new assessed valuation and, in the same notification, shall provide property owners the option to request an informal hearing, if they so desire. The notice provided by the Auditor shall give a phone number or email address to contact in order to schedule a place, time, and date for such hearings. The Auditor shall be responsible for scheduling all informal hearing requests.

24.2 The Contractor shall provide a sufficient number of qualified representatives to meet with taxpayers who may wish to discuss or obtain a further explanation as to the appraisals and procedures used to arrive at value estimates. The Contractor's on-site supervisor shall be available during all informal hearings, until all complaints are heard and disposed of, to assist in the settlement of disputes, answer questions and defend estimates of value. If necessary, to accommodate property owners, the Contractor shall hold informal reviews on weekends or during evening hours.

- 24.3 Upon completion of the informal hearings, Contractor personnel shall review the appraisal on any property or item on which the valuation may be disputed and make corrections where necessary to reflect "fair market value."
- 24.4 The Contractor shall refer any mapping questions and corrections to the Auditor's Chief Deputy Auditor and/or the County's GIS Director.
- 24.5 The Auditor shall not accept a proposal which limits the number of days of informal hearings to be held with property owners. The Contractor will have established the values and has a responsibility for defense and discussion of those values with taxpayers.

**25. FORMAL DEFENSE OF VALUES**

- 25.1 The Auditor or his representative will conduct the Board of Revision (BOR) hearings on behalf of the BOR following completion of the work by the Contractor under this Contract.
- 25.2 Although it is not necessary for them to be on-site at the County offices during the BOR process, the project director or a qualified appraiser for the Contractor shall be available during the entire BOR process to answer any questions the BOR may have or assist in any manner requested by the Auditor in defending any valuation(s) based upon the Contractor's appraisal. However, upon the request of the Auditor, the project director or a qualified appraiser for the Contractor will be on-site to assist the BOR in whatever manner deemed necessary to defend an individual case(s).
- 25.3 It is understood and agreed that compensation for such assistance at the Board of Revision hearings will be included in the Contractor's bid proposal and shall be without additional compensation to the Contractor other than that specified in the bid proposal. The Auditor will not accept any proposal which places a limitation on the number of days of formal defense of values to be provided by the Contractor at the Board of Revision or at the Board of Tax Appeals/Court of Common Pleas.

25.4 In the event of an appeal to the State Board of Tax Appeals, Common Pleas Court, or higher court of any assessments based on the Contractor's appraisal and at the request of the Auditor, the Contractor shall furnish a qualified representative familiar with the project and experienced in court testimony to be present at hearings to testify as an expert witness; to outline the steps taken in the appraisal; and to give an opinion as to the value of the property involved in any appeal.

## **26. WORK AND DELIVERY SCHEDULE**

26.1 The Contractor shall begin the contracted work to be carried out within thirty (30) days after the acceptance of this agreement by the Tax Commissioner and shall carry on the program of reappraisal without interruption and shall complete and deliver said work in accordance with a detailed work schedule. The Contractor shall be responsible for preparing all value estimates by February 28, 2024, which shall include the valuation of all new parcels created through January 1, 2024, and all items of new construction completed on January 1, 2024, and this information shall be included on the data collection forms as delivered to the Auditor.

26.2 The collection of new construction and appraisal of split/combination parcels shall be conducted by the Auditor's Office.

26.3 Within twenty (20) days after the award of the proposal, the Contractor shall submit to the County for approval, a final detailed schedule giving the beginning and ending month of each phase of the project. The schedule shall also give the minimum projected percentage of completion for each phase at the end of each month, after work on a phase has begun. The percentage of completion report shall be used as a basis for evaluation performance of the work covered by the Contract when correlated with the monthly Appraisal Billing Progress Report. In addition, the Contractor shall submit a Personnel Allocation Chart to the Auditor for review within twenty (20) days of the award of the Contract and prior to starting the contracted work.

26.4 The Contractor's timely performance of the contracted work under the Contract is predicated on the non-occurrence of strikes, explosions, war, fire, gasoline rationing, acts of God or any act of failure to act by officials of the County which might delay or stop progress of the work. In the event of such occurrence, the Contractor shall be entitled to an extension of the delivery date. Any such extension of time must be approved by the Auditor and the Tax Commissioner.

26.5 Within ten (10) working days of the completion of the informal hearings, there will be delivered to the County the following to become the permanent records of the County:

26.5.1 all data collection forms for each parcel of real estate within the County;

- 26.5.2 neighborhood analysis forms and delineation maps used by the Contractor in the appraisal of land showing unit land prices, market data and factors used in determining land values;
  - 26.5.3 a final residential sales file log printout listing all property transfers within the County throughout the process of the reappraisal program;
  - 26.5.4 any and all supporting data and documentation pertaining to the reappraisal of parcels within the County;
  - 26.5.5 all income and expense forms and questionnaires;
  - 26.5.6 all documentation regarding taxpayer complaints;
  - 26.5.7 all routing maps, street pricing maps, and land pricing maps; and
  - 26.5.8 all appraisals, records, and deliverable items which constitute the work of the Contractor, which shall be completed and delivered to the Auditor within ten (10) days of the conclusion of BOR hearings.
- 26.6 The project shall be considered complete at the close of the final Board of Revision hearings immediately following delivery of the completed appraisals and records to the Auditor. However, completion of the project does not release the Contractor of its obligation to aid and assist the Auditor in the event any assessment is appealed to the State Board of Tax Appeals, the Court of Common Pleas or higher court as more specifically set forth under Section 25.4 of these Specifications.

## **27. INSURANCE**

- 27.1 The Contractor agrees to defend and indemnify the County, its employees and agents against any and all losses, costs, damages, suits, claims, demands, actions and expenses occasioned by or rising out of any accidents or occurrences causing or inflicting injury and/or damage to any person or property arising from the Contractor's performance of the Contract by any of the Contractor's agents, employees or officers.
- 27.2 The Contractor shall, at its own expense, procure and maintain casualty and liability insurance from a responsible insurer authorized to do business in the State of Ohio in amounts of not less than one million dollars (\$1,000,000) for the death or injury of each person and one million dollars (\$1,000,000) for each accident and with limits of one million dollars (\$1,000,000) for property damage to protect the County, its officers, agents and employees against such costs, claims, damages or expenses due to injury or death to any person or persons or to any property belonging to any person or persons by reason of such casualty, accident or other happening.
- 27.3 The Contractor shall carry Workers' Compensation in compliance with State Law.
- 27.4 Certificates or copies of said policies shall be included with any proposals submitted. The Contractor shall also give the County any notice of the cancellation of any insurance policies providing coverage under the terms of this

section. Certificates or copies of said policies shall be included with any proposal submitted.

**28. OFFICE SPACE, FURNISHING, EQUIPMENT AND SERVICES**

The County shall furnish adequate office space and equipment during the duration of the reappraisal program.

**29. COMPENSATION, MONTHLY APPRAISAL PROGRESS REPORTS & MEETINGS**

29.1 The Contractor shall conduct monthly reappraisal progress meetings with the Auditor and any Auditor's staff members which the Auditor requires to be in attendance. At such meetings, the Contractor shall submit a detailed Monthly Appraisal Billing Progress Report with the County. Each report shall disclose the type or types of work performed the preceding month and shall summarize the percentage of completion for the total project as a whole. The County shall have the right to review with the Contractor its report of progress.

The Contractor's monthly progress report shall be prepared on the standard form approved by the Auditor. The statement shall contain the following information for each phase of the project:

- a) previous reported units of completed work;
- b) previous percent of completed work;
- c) previous amount billed for the work;
- d) units of work completed for the month;
- e) percent of work completed for the month;
- f) amount billed for work completed for the month;
- g) total units of work completed to date;
- h) total percent of work completed to date; and
- i) total amount billed for work completed to date.

29.2 The Contractor shall bill monthly for an amount which shall be in such proportion to the fee as the percentage of the project completed during the preceding month shall bear to the entire project as reported on the Monthly Appraisal Billing Progress Report form.

29.3 A retainage of ten percent (10%) shall be withheld from all payments until completion of all work.

29.4 Monthly payments, less the ten percent (10%) retainage, shall be due and payable within thirty (30) days of the billing date unless approval of payment or any part thereof is withheld by the Auditor, in which event, the Auditor shall promptly notify the Contractor in writing, giving the specific reason(s) for withholding payment or a portion thereof. Should any defective work be discovered or should a reasonable doubt arise regarding the integrity of any part of the work completed to date, there will be a percentage withheld from the monthly payment equal to the amount of defective or questioned work recorded

on the Monthly Appraisal Billing Progress Report. The amount of defective or questioned work shall not be included in a subsequent report until the defects have been remedied or the cause of doubt removed.

29.5 The County and the Tax Commissioner shall have the option to inspect all work which has been declared for payment on the Monthly Appraisal Billing Progress Report. This inspection may include the production of computer reports, table listings, and data collection forms during times which are reasonable and convenient to both parties and will not unnecessarily cause any undue delays in the progress of the program.

### **30. RESTRICTIONS AND COMPLETION PENALTIES**

30.1 The Contractor shall not assign, transfer or sublet this Contract or any interest therein without prior written approval from the Auditor and the Tax Commissioner.

30.2 The Contractor shall comply with all applicable Federal, State and local laws, rules and regulations during the performance of the work outlined.

### **31. INDEPENDENT CONTRACTOR**

The Contractor is not an employee or agent of Lake County, but shall be carrying out the work of the reappraisal project as an independent Contractor.

### **32. CONTRACT**

32.1 The Contract shall be entered into between the Contractor and the Auditor of Lake County and the successful Contractor shall understand and the proposal shall state that these specifications are an integral and inseparable part of the contract as if all the contents had been copied into the Contract. If any clause of the contract conflicts with these specifications, these specifications will control.

32.2 The County is obligated only to pay such periodic payments under this Contract as may lawfully be made from funds budgeted and appropriated for that purpose during the County's current budget year and approved by the Tax Commissioner for expenditures from the County Real Estate Assessment Fund.

32.3 The Contract shall in no way be effective until approved by the Tax Commissioner of the State of Ohio. The sexennial reappraisal contracted work shall start within fifteen (15) days after the acceptance of this proposal by the Auditor and its approval by the Tax Commissioner. There is to be no subcontracting of all or any part of the services provided under this contract without the written consent of the Auditor and Tax Commissioner obtained prior to the execution of the subcontract.





November 15, 2021

Dear Vendor:

Enclosed please find Lake County's Request for Proposal (RFP) for the *2024 Revaluation of Real Property, the 2022 and 2023 New Construction of Real Property and the 2023 Reappraisal of Manufactured Homes*. As you review this RFP, please ask how can we improve the analysis and refine the methodologies used to determine the value of real property. Where can we make adjustments? What would you do differently?

In reviewing your proposals, we will be interested in how you address the following key points:

1. Describe the analysis you will utilize to determine valid and true market values. Many neighborhoods will have very few traditional sales. What are your recommendations to ensure the validity of the analysis? Please include a detailed description of the steps to be used in analyzing and determining valid sales.
2. Propose how best to gather and verify information to ensure the accuracy of our data regarding property characteristics.
3. Propose how to gather feedback from public officials, zoning officials, neighborhood officials and other community leaders.
4. Prescribe in your proposal a public relations program that will incorporate new marketing materials, tools and strategies to educate the public on the 2024 Revaluation and garner their feedback.

We value your input on these points and ask for your recommendations as part of the proposal process. Please include in your proposal how you would incorporate these four points into your work processes and contract.

Proposals will be accepted until close of business January 28, 2022. We will schedule oral presentations as part of our review. Please keep in mind that the agreement will be based on a fixed price, and we will consider segmenting the contract as well as a contract for the whole. Proposal selection will be at the discretion of the Auditor.

If there are questions regarding this Request for Proposal, please contact Michele Pennell at 440-350-2618 ([mpennell@lakecountyohio.gov](mailto:mpennell@lakecountyohio.gov)), 105 Main Street Suite C101, Painesville, OH 44077.

Yours in Freedom,

Christopher A. Galloway  
Lake County Auditor

## **Addendum**

For alternate bids, the Auditor understands that more information may be needed than what has been provided in this document. Below are more specific data points that may aid the bidding process.

Current CAMA System: Tyler IASWorld

Sketch Program: Tyler I-Sketch

Multi-Page Sketch Files: Yes

Single Building or Multi-Building Sketch: Single Building

Sketches: Can be Stacked Layers or Bird's Eye View

Sketch Count: 86,264 Residential and 5,163 Other

Last Aerial Flight: April 2021. Next Flight: Fall 2023/Spring 2024

Change Detection: No

2021 New Construction Figures:

AG/Residential – 1,463

Exempt/Commercial/Industrial Permits – 233

Plats/Splits/Combos – 518 parcels

Pictometry with 2021 oblique photography as well as Street View will be available.

TIF Parcels – 629

Abated Parcel - 110