

**Fairfield County, Ohio**

**The Honorable Jon A. Slater, Jr., County Auditor**

**Request for Proposal**

**For**

**Fairfield County 2019 Reappraisal Project**

**as of**

**Tax Lien Date of January 1, 2019**

## **Legal Advertisement**

The Tax Commissioner of the State of Ohio has ordered a reappraisal of all the real property located within Fairfield County (sometimes referred to hereafter as “the County”) to be completed for the tax lien date of January 1, 2019. Therefore, the Auditor shall receive proposals to conduct a reappraisal within Fairfield County, Ohio from qualified firms authorized by the Tax Commissioner to conduct reappraisal programs within the State of Ohio. Copies of the Request for Proposal which contain the terms and conditions relevant to this Fairfield County 2019 Reappraisal Project are available from the County Auditor’s website commencing on March 6, 2017 at the following web address:

<http://www.co.fairfield.oh.us/auditor/FORMS/2019-Reappraisal.htm>

and may also be picked up in hard copy commencing on March 6, 2017 between the hours of 8:00 am and 4:00 pm at the following address: 210 E Main Street, Room 201, Lancaster, Ohio 43130.

Said proposals shall be accepted until 10:00 am on Monday, April 3, 2017 at which time the Proposals will be opened at the Fairfield County Commissioners’ Hearing Room located at 210 E Main Street, Lancaster, Ohio 43130.

Published March 6, 2017 and March 13, 2017

**SPECIFICATIONS FOR  
REVALUATION PROGRAM OF FAIRFIELD COUNTY  
TAX LIEN DATE JANUARY 1, 2019**

**1. SUBMISSION OF PROPOSALS**

- 1.1. Sealed proposals shall be accepted until 10:00 am on Monday, April 3, 2017 at the office of the Fairfield County Auditor, 210 E. Main Street, Rm 201, Lancaster, OH 43130.
- 1.2. The Fairfield County Auditor (“County”) will not accept proposals that are not delivered to the above address by the date and time in the preceding paragraph. Therefore, all Offerors that wish to be considered as potential suppliers for the 2019 Fairfield County Reappraisal must assure that the proposal will arrive on a timely basis. Proposals shall be opened at the Fairfield County Commissioners’ Hearing Room, 210 E. Main Street, Lancaster, OH 43130 at 10:00 am on Monday, April 3, 2017.
- 1.3. Envelopes containing proposals (four (4) printed and bound copies and one (1) electronic copy in PDF format) in response to this RFP must be sealed and marked on the face with the name and address of the Offeror and the words “Fairfield County 2019 Reappraisal Project - Proposal.”
- 1.4. The Cost Proposal for each submission meeting the requirements of this RFP must be sealed in a separate envelope and marked on the face with the name and address of the Offeror and the words “Fairfield County 2019 Reappraisal Project – Cost Proposal.”
- 1.5. If the Offeror is proposing alternatives which differ from the requirements of this RFP, a separate Alternative Cost Proposal must be sealed in a separate envelope and marked on the face with the name and address of the Offeror and the words “Fairfield County 2019 Reappraisal Project – Alternative Cost Proposal.”
- 1.6. The Bid Bond for each submission meeting the requirements of this RFP must be sealed in a separate envelope and marked on the face with the name and address of the Offeror and the words “Fairfield County 2019 Reappraisal Project – Bid Bond.”
- 1.7. An Offeror may withdraw its proposal before the proposals are opened. The request for withdrawal must be in writing and must be submitted prior to the date and time on which the proposals are scheduled to be opened as set forth above. Once any proposal is opened by the County it shall be deemed to be valid for ninety (90) days after the date on which such proposal was opened. Any party submitting a proposal may agree in writing to extend beyond ninety days the time in which the proposal shall be deemed valid after the date on which it is opened.

## 2. BID AND PERFORMANCE BOND

- 2.1. Each Offeror shall furnish to the County upon submission of its proposal a bid bond in the amount of (10%) of the total amount of the proposal. The bid bond must be included with each proposal or the County will deem such Offeror's proposal to be non-responsive and will not receive further consideration. The bond is to be in the form of a surety bond, certified check, cashier's check or money order from a solvent bank, or savings and loan association with the *Fairfield County Board of Commissioners* identified as the Obligee. Bonds will be returned to all successful and unsuccessful vendors within 30-days of contract award.
- 2.2. The offerors shall furnish to the County within ten (10) days of the execution of the contract a performance surety bond in the amount of (100%) of the amount of the contract. Said bond will be issued by a registered bonding company authorized to do business in the State of Ohio. The performance bond will be delivered to the County within ten (10) days of contract execution and will remain in effect until the tentative abstract has been accepted and approved by the Department of Tax Equalization.

## 3. COMMUNICATIONS WITH AUDITOR

- 3.1. Any questions that arise during the preparation of proposals concerning the content of the RFP shall be submitted to the County via email.
  - 3.1.1. Email Address: [david.burgei@fairfieldcountyohio.gov](mailto:david.burgei@fairfieldcountyohio.gov)
  - 3.1.2. Subject Line: Fairfield County 2019 Reappraisal Project - RFP Questions.
- 3.2. Contact with any Fairfield County employee or member of the County's staff concerning this RFP except through the email address listed above, with questions specific to the contents of this RFP is strongly discouraged. The question asked via email and the County's response, if any, shall be posted at the following public website:  
<http://www.co.fairfield.oh.us/auditor/FORMS/2019-Reappraisal.htm>

Questions shall be sent no later than Monday, March 27, 2017, to be considered for a response by the County.
- 3.3. The foregoing does not apply to communications during the evaluation process if the County initiates the communication. Discussions and/or negotiations may be conducted with Offerors who submit proposals for the purpose of clarification and/or correction, including any revisions that may occur during negotiations, to assure full understanding of and responsiveness to the requirements, terms and conditions and specifications of the RFP. Offerors shall be accorded fair and equal treatment in any clarification and/or correction and/or negotiation process.

#### 4. RIGHT TO REJECT PROPOSALS

- 4.1. The County reserves the right to reject any and all proposals where the party submitting the proposal (“the Offeror”) takes exception to any of the terms and conditions of this RFP or fails to meet the terms and conditions, including but not limited to, standards, specifications, and requirements as contained in the RFP.
- 4.2. The County reserves the right to reject, in whole or in part, any and all proposals where the County, taking into consideration factors including but not limited to, price and the results of the evaluation process, has determined that award of a contract would not be in the best interest of the County.
- 4.3. The County reserves the right to cancel, reissue or reject all responses to an RFP, in whole or in part, when: (1) The supplies and/or services offered by the Offeror are not in compliance with the requirements, specifications, and terms and conditions set forth in this RFP; or (2) Pricing offered in the Offeror’s proposal is considered to be excessive in comparison with existing market conditions or exceeds the available funds of the County; or (3) It is determined by the County’s Office that award of a contract would not be in the best interests of the County.
- 4.4. The County may award a contract in whole or in part to one or multiple offerors.
- 4.5. The County may reject any and/or all proposals, and waive any informality or technicality in the proposal. The County shall award a contract to the Offeror of the lowest and best proposal. The County shall be the sole judge of whether an Offeror has or has not met the requirements of this Request for Proposal.

#### 5. PARCEL COUNT

5.1. Fairfield County has the following total parcel count as of January 2017.

	<b>Improved</b>	<b>Vacant</b>	<b>Total</b>
Residential	47,966	8,305	56,271
Agricultural	3,229	3,992	7,221
MMH*	1042	0	1,042
Commercial	2,291	1,332	3,623
Industrial	129	194	323
Exempt	1,022	1,477	2,499
Public Utility	321	60	381
Minerals and Oil	0	176	176
<b>Total</b>	<b>56,000</b>	<b>15,536</b>	<b>71,536</b>

The above parcels include road ROW without value and other parcels holding value only.

\* Includes all manufactured homes subject to manufactured home tax.

## **6. EXAMINING PROPOSED PROJECTS**

- 6.1. Offerors are invited to visit and inspect Fairfield County for physical and economic conditions, as well as the maps and records in the County's office and other County offices. Offerors may 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. Failure to conduct such an inspection does not in any way relieve the offerors 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.

## **7. PURPOSE OF REVALUATION**

- 7.1. The purpose and intent of this RFP is to assure that Fairfield County receives a complete and accurate reappraisal of each parcel of real property in the County. It is also to assure that the revaluation conforms to the Standards established by the International Association of Assessing Officers, the Uniform Standards of Professional Appraisal Practice, as well as the generally accepted standards within the mass appraisal industry. The services provided by the offerors shall conform to the Constitution of the State of Ohio, the laws contained in the Ohio Revised Code, the Ohio Administrative Code, and the rules and regulations as established by the State of Ohio for revaluation programs.
- 7.2. The value estimates prepared for each parcel of real property within the County shall be at its true cash value or its market value.
- 7.3. The effective date of the appraisal to be made under this RFP for all real property values in the County shall be January 1, 2019 as tax lien date, and all work in connection with that appraisal shall be completed by March 31, 2019 except for new construction and demolitions which include destroyed buildings reported after that date. Services related to informal hearings and the Board of Revision services shall be conducted after March 31, 2020.
- 7.4. The role of an Offeror awarded a contract hereunder shall be to assist the County in establishing an estimate of the true cash value or market value of each parcel of real estate in the County for the preparation of ad valorem tax assessments. All final estimates of value, and final decisions pertaining to the fair market value, shall be the responsibility of the County and nothing in these specifications or in the contract is to be construed or interpreted as changing this authority and responsibility.

## **8. SCOPE OF APPRAISAL SERVICES**

- 8.1. It shall be the responsibility of the offeror and its supervisory personnel to plan, initiate, and complete the reappraisal of all parcels of real property in the County using accepted mass appraisal methods, all available technical resources, and cost procedures to produce defensible estimates of true value.

- 8.2. Improved parcels, for the purpose of this proposal, shall consist of property with affixed dwellings, structures, buildings, or other improvements which require the measurement and listing of construction characteristics in order to estimate their market value.
- 8.3. Unimproved parcels, for the purpose of this proposal, shall consist of parcels of land which are not improved.
- 8.4. In performing the work hereunder, the offerors shall comply with the Ohio Constitution, the Ohio Revised Code, the administrative rules as promulgated by the Ohio Tax Commissioner and the Ohio Department of Taxation, the Standards for the Mass Appraisal of Real Property and the Standard on the Application of the Three Approaches to Value in Mass Appraisal both of which are promulgated by the International Association of Assessing Officers (“IAAO”), established by the IAAO, the Uniform Standards of Professional Appraisal Practice promulgated by the Appraisal Foundation, and generally accepted mass appraisal procedures.

## **9. ADDITIONAL REQUESTED SERVICES AND SPECIFICATIONS**

### 9.1. iasWorld

9.1.1. The County utilizes the Tyler Technologies “iasWorld” CAMA and Tax products (collectively, “iasWorld”) software. The offerors shall be required to be familiar with and have a level of proficiency by all to effectively use the many iasWorld software programs that are available to assist in the real estate valuation process as well as fully integrating the services it is to provide hereunder with the iasWorld software system.

### 9.2. New Construction

9.2.1. The County will be responsible for the collection and valuation of data for all new construction and demolition of improvements there on parcels of property for tax years 2017, 2018 & 2019. The County will utilize the Field Mobile application within iasWorld for all field data collection, data changes/updates, and updating iasWorld. There are no plans by the County to print traditional paper copies of Property Record Cards for data collection to be provided to the offeror. Subsequent references in this RFP to a “Property Record Card” shall mean predominantly electronic or digital media that contain the information typically found on the printed property record card. The offerors shall demonstrate how it will coordinate with the County to ensure that data for all new construction and destruction on parcels that occurs in tax years 2017, 2018 & 2019 will be properly and accurately reflected on the final file.

9.2.2. The offerors shall demonstrate such processes to allow the County to collect new construction data until such time as the 2019 Tentative Abstract is approved by the State of Ohio.

9.3. Street Level Photography

9.3.1. The County implemented street level photography beginning with the 2013 Reappraisal. The County has added additional photography to the photography library for new construction activities from 2013 through present. The street level photography and attributes such as Category, Rank, Year, Card, Notes, etc., are stored within the iasWorld image library. The County requires the offerors to demonstrate their procedure and process for capturing street level photography for all parcels within the County.

9.3.1.1. The offerors shall take a photograph(s) of every parcel within the County as outlined in Sections 17 through 21 of this RFP.

9.3.1.2. The offerors shall be responsible for uploading all street level photography for every parcel within the County into the existing iasWorld photography library.

9.3.1.3. The offerors shall be responsible for reclassification of attribute data for both new and existing street level photography as outlined by the County.

9.3.1.4. The new street level photograph of the front of the structure shall be flagged as Primary and attributed with the Rank of 1.

9.3.1.5. The offerors shall demonstrate their Quality Control procedures which allow the County to review and approve the photography prior to being uploaded into iasWorld.

9.4. Pictometry – Change Finder

9.4.1. The County has integrated the use of Oblique Imagery for the mass reappraisal process since the 2013 Reappraisal. Oblique imagery has been captured at 4 inch pixel resolution for both years of 2012 and 2015. Fairfield County has also entered into a contract with the Pictometry Corporation to provide oblique imagery to be flown over Fairfield County during the Spring of 2017 at 3 inch pixel resolution.

9.4.2. The County has integrated the use of Pictometry’s “Change Finder” application for the previous 2013 Reappraisal and 2016 Triennial Update. The offerors shall utilize the Change Finder program such that it will show the changes that occurred on each parcel of real estate in the County: (a) between 2012 and 2015; and (b) between 2015 and 2017.

9.4.3. Fairfield County’s contract with Pictometry for the new 2017 Oblique imagery includes the new Change Finder project comparing the imagery

from 2015 to 2017. The data obtained from this project will be implemented by the offerors as a tool to ensure all structures are accurately accounted for as of January 1, 2019.

9.4.4. The offerors shall demonstrate within its proposal how it will: (a) complete the review and documentation on the 2015 Change Finder project, and (b) complete the review and documentation of the new 2017 Change Finder project.

9.4.5. The County intends to use the data from both Change Finder projects described in Section 9.4.4(a) and (b) to evaluate and determine if it's more economical and practically feasible to implement the use of the Change Finder application on a 3-year or a 6-year basis.

#### 9.5. CAUV Program

9.5.1. The County has been implemented a special project relative to the Current Agricultural Use Valuation (CAUV) program. The County has developed a new land use feature contained within its GIS system to more accurately identify the CAUV components including, but not limited to, soil types and the current land use. Utilizing this new feature in conjunction with GIS tools, we are creating new highly accurate soil and use breakdowns for each of the parcels enrolled in the CAUV program. We are in the process of transferring the new breakdowns into the Ag tables within iasWorld.

9.5.2. In conjunction with the 2019 Reappraisal, the Offeror will be responsible for completing this update for Tax Year 2017.

9.5.3. It is the intention of the County for the Offeror to begin this project as soon as the Contract is issued.

9.5.4. It is the intention of the County for the Offeror to provide a qualified employee to work on site under the day to day direction of the County's CAUV Administrator and have this phase of the project completed prior to the County's submission of the TY2017 abstract to the Tax Commissioner.

### 10. **MONTHLY MEETINGS**

10.1. The offeror shall develop a plan for regular monthly project update meetings with the County and/or his designees. The purpose of the monthly meeting shall be to report to the County the progress of each phase of this project and to monitor the progress against the master timeline which was developed for its completion. Each Offeror shall include a master timeline of significant project dates and milestones in its Proposal as outline in section 32.3.

- 10.2. At each scheduled meeting the offerors shall report on job progress, job obstacles, and compliance with the specifications that have been agreed upon.
- 10.3. Written minutes of each meeting shall be maintained and updated by the offerors in a project log with a copy provided to the County.

## **11. ELECTRONIC REPORTING SYSTEM**

- 11.1. The Offeror shall be responsible for providing the County with a comprehensive reporting system that will reflect each phase of the project. It will be submitted in electronic format accessible to the County. It shall include both the macro and parcel level reporting.

## **12. PERSONNEL**

- 12.1. The Offeror is required to provide personnel with experience and knowledge in the various types of property encountered in the appraisal of Fairfield County.
- 12.2. The Offeror shall furnish qualified professional appraisers and thoroughly indoctrinated technicians employed by the Offeror to comply with the standards and specifications contained herein.
- 12.3. The Offeror will continually maintain professionally qualified personnel sufficient to ensure the satisfactory completion of this project in accordance with the standards, specifications, and timeframe contained herein.
- 12.4. The Offeror shall use, throughout its engagement, competent employees of good character. All of those individuals chosen by the Offeror to perform work hereunder 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. The Offeror shall submit names, addresses, education, and courses attended during the past three (3) years and their previous work experience in the State of Ohio prior to the time that they begin to work within this County.
- 12.5. The Offeror, upon written notice from the County, shall remove any person or persons whom the County requests be removed from the job.
- 12.6. The offerors, or County, shall provide proper identification to all of those individuals chosen by the Offeror to perform work hereunder who, by reason of their work, shall be in contact with the general public or with the staff of the County. Identification badges will be in the shape and design of the existing County identification badges, with the title being "Contract Appraiser". Such identification must be clearly displayed on outside clothing of all personnel during fieldwork, and readily visible when in the County's office. Nothing contained herein shall require that the County indemnify or defend the Offeror or any individuals performing work on behalf of the Offeror for such individual's acts or omissions.

- 12.7. All vehicles used by Offeror personnel for fieldwork shall be clearly identified with signs located on the side of the vehicle that show that this is a county appraiser. The County shall approve the wording of such signs before use.
- 12.8. As required by Revised Code 5713.012(B), the Offeror shall designate and identify the Qualified Project Manager for this reappraisal. The proposal shall demonstrate the Project Manager meets all the requirements as outlined in RC 5713.012(A)(2). The Project Manager will closely supervise the operation of the Offeror's staff throughout the entire project. The individual designated as the Project Manager must be approved by the County prior to the commencement of the work on the appraisal and such person shall be available to the County for consultation, instruction, and training on a continuous basis throughout the project.
- 12.9. The Offeror shall provide appropriate statement accordingly to its services, facilities, and employment opportunities shall be available equally to all persons without regard to race, color, sex, creed, age, religion, or national origin.
- 12.10. The Offeror shall notify the County in writing of any changes in supervision or personnel during the life of this project. This notice shall include the reason for the change, and provide a plan for an immediate replacement or suitable remedy. The County shall have the right to reject any such replacement and if so rejected, the Offeror shall replace the rejected individual with a person approved by the County. Notwithstanding the foregoing, the Offeror shall at all times be responsible for the work and acts of its employees and agents.
- 12.11. All appraisal work of any kind, type, or description shall be coded to identify the individual performing work on behalf of the Offeror carrying out that task so problems can be readily identified.

### **13. OFFEROR'S QUALIFICATIONS**

- 13.1. Each Offeror shall be listed on the Tax Commissioner's entry, and be authorized to conduct mass appraisals within the State of Ohio. Further, the Offeror shall submit with this proposal evidence satisfactory to the County that states the Offeror has the necessary experience, ability, facilities, and resources to meet all conditions and requirements set forth in this RFP. The Offeror shall include the following as an integral part of the proposal:
  - 13.1.1. The Offeror shall provide a client list of similar projects (past and current) awarded to the Offeror for at least the past five (5) years. The Offeror shall include the contract duration with dates and the geographic area served.
  - 13.1.2. The Offeror shall include 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. The Offeror shall keep the organizational chart current and immediately provide the County with updates as changes occur.

13.1.3. The Offeror shall include in the proposal resumes of all key personnel who shall work on this project, including a list of prospective project supervisory personnel and the Project Supervisor who will be assigned to this project.

13.2. Within twenty (20) days after the awarding of a contract, the Offeror shall submit to the County resumes of all appraisal, supervisory, and managerial personnel assigned to this project within the organizational structure as required above. The County shall have the right to reject any such personnel from working on the appraisal in which case, the offerors shall replace such personnel with individual(s) approved by the County. Notwithstanding the foregoing, the Offeror shall at all times be responsible for the work and acts of its employees and agents and shall defend, indemnify, and hold harmless the County, the County County, and all of their respective employees and agents, from any and all costs, damages, or injuries caused to persons or property by the Offeror or its employees and agents..

#### **14. NEIGHBORHOOD ANALYSIS**

14.1. The offerors shall be responsible for evaluating and determining the confines or boundaries of each of the “neighborhoods” that exist within Fairfield County. In determining a “neighborhood”, neighborhoods should physically be delineated to reflect a high degree of homogeneity in governmental, social, economic, and physical characteristics, usually, but not necessarily, outlined by boundaries, either natural or manmade. Delineation of neighborhoods will be done separately for residential and commercial/industrial properties. For residential neighborhood boundaries, an appraiser will consider at least the following: manmade or natural obstructions; similarity of structures, quality of construction, price range, style of homes, desirability of the area and recent market trends. The following additional items should be considered for commercial/industrial neighborhoods: traffic flow, class/use of properties, income ranges, rents and zoning.

14.2. As a part of the evaluation, a comprehensive economic and demographic analysis will be carried out for each neighborhood as part of an analysis the Offeror will consider physical, economic, governmental and social characteristics within the County. The objective of the analysis is to determine the homogeneity of the neighborhood and its usability for future data analysis.

14.3. Each residential, rural, commercial and industrial neighborhood shall be assigned a unique identification number. This identification number shall be placed on each property record card stated in the manner that the data can be entered into the County’s current CAMA system.

- 14.4. This number will be recorded on every parcel that falls in that particular neighborhood and will be used to drive land prices, select comparable sales, assign the appropriate income model, and to analyze market conditions versus Contractor's produced value estimations. On maps provided by the County, the Contractor will develop, draw and identify updated neighborhood boundaries with identification numbers that will be used to delineate neighborhoods throughout the County.
- 14.5. Once neighborhoods are delineated as set forth above, the Offeror shall develop a comparative neighborhood analysis to readily allow for the development of data bases of similar areas, that may or may not be contiguous, so that those data bases then be used to draw sales for the comparison process.
- 14.6. A comprehensive report of neighborhood analysis shall be delivered to the County no later than December 1, 2017. In addition, the Offeror shall continue to monitor new construction and economic trends so that changes that occurred during 2017, 2018 and early 2019 can be reflected in the neighborhood boundaries and in their analysis.

## **15. SALES VERIFICATION AND SALES ANALYSIS**

- 15.1. The Offeror shall be responsible for verifying the nature of the sales for the purpose to determine validity. The Offeror shall test at a minimum of twenty percent (20%) randomly drawn sales transactions otherwise validated by the County for each of the calendar years 2016, 2017 and 2018. The Offeror shall contact (with at least two (2) attempts) the buyer, seller or their agents of each transaction in the sample and attempt to learn the terms and conditions of the sale as well as the value of any personal property that may have transacted in the sale.
- 15.2. The Offeror shall develop a report comparing the sample validation to the County's previous validation.
- 15.3. The Offeror shall develop a comprehensive validation report regarding all sales or other transfers that have taken place in 2016, 2017, and 2018 to be delivered at the end of the project.
- 15.4. The Offeror shall be alert to any property that is sold twice within the three-year period and conduct a paired sales analysis of these properties and a specific report to the County of the results of this analysis.
- 15.5. The Offeror shall eliminate any sales which transacted on less than an Arm's-Length basis and include a report in the final deliverables to the County showing those sales that took place within the County but were not included in the analysis.
- 15.6. The Offeror shall also be responsible for the verification of all sales which take place between January 1, 2019 and March 31, 2019. The analysis of the sales shall be

included in the report identified in Section 15.3 and a comparison made to determine any trends which may be discernable from the data.

## **16. APPRAISAL OF LAND**

- 16.1. The Offeror shall analyze the physical, economic, governmental, and social characteristics within the County that impact on land values. Each neighborhood within the County and the sales therein shall be considered in the valuation of land.
- 16.2. The Offeror shall be responsible for assigning the appropriate land use codes, as well as land valuation methods. In addition, the Offeror shall be responsible for applying an accurate land footprint breakdown for all commercial, industrial and exempt properties.
- 16.3. An estimate of the “true cash value” shall be prepared for the land part of each parcel, and shall be listed separate from improvement values. The Offeror shall make a detailed study of current land values, and prepare detailed land schedules by market area at the conclusion of the project.
- 16.4. The sales data covering fair market sales of vacant land in all property classifications shall be secured. The Offeror shall compile, verify, and analyze the sales for use in the valuation of land in relation to the indicated units of comparison throughout the County. Although emphasis shall be placed on the sales comparison approach in the estimate of market value of the land, other customary processes such as abstraction, allocation and the capitalization of ground rent may be utilized.
- 16.5. In addition to the standard sales comparison approach to land values, the Offeror is also required to utilize other evaluation techniques such as allocation or extraction as it relates to the land values in the areas that have few, if any, vacant land sales.
- 16.6. The Offeror shall carefully consider and make appropriate adjustments for all factors affecting the value of land including, but not limited to, zoning, location, shape, size, topography, excess frontage, fractional acreage, access to railroads, roads, waterways, utilities available to the property, and the highest and best use of the land. All land shall be valued as vacant.
- 16.7. The Offeror shall ascertain from sales of other real estate parcels the appropriate units 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:
  - 16.7.1. Residential--front foot values, square foot values, acreage values, or site values
  - 16.7.2. Commercial--front foot values, acreage values, or square foot values
  - 16.7.3. Industrial--square foot values, or acreage values
  - 16.7.4. Rural Residential and Agricultural--acreage values using productivity

- 16.8. All base urban land values shall be recorded by the Offeror on land valuation maps or aerials showing the applicable front foot, square foot, or acreage values block by block, or neighborhood by neighborhood.
- 16.9. The individual land value characteristics and influence factors on each parcel shall be recorded in the appropriate fields of the property record card and carefully checked for accuracy.
- 16.10. All percentage adjustments related to influence factors shall be made by qualified appraisers and supported by documentation and informed judgment.
- 16.11. Agricultural land shall be classified and appraised according to its true cash value using the productive capability of each type of soil as a basis for measurement.

## **17. RESIDENTIAL PROPERTY**

- 17.1. Prior to undertaking any appraisal work hereunder at the site of the parcels to be appraised, the offerors shall develop schedules and guidelines which will be reviewed and approved by the County. The offerors shall inspect the exterior of each structure to be appraised. The interior information for such structures shall be obtained from the property owner through questionnaires requesting this data. Construction features, characteristics, attachments, accessory buildings, and yard improvements for each parcel shall be recorded on the property record card. Construction quality grade shall be applied. Periodic quality inspections of the work of all appraisal personnel shall be made by the offerors to ensure correct, uniform, and consistent application of grade classification.
- 17.2. A proportional perimeter sketch of each residential dwelling shall be verified and/or drawn on the property record card. All necessary dimensions and identification symbols shall be placed on each sketch. All attachments such as garages, porches, and carports shall be clearly shown with dimensions, and labeled. Other structures and yard improvements of contributory value shall be measured, listed, and valued. Exterior dimensions shall be rounded to the nearest foot. When the dwelling is too large or complex to be sketched on the property record card, a separate sketch shall be made and attached to the card. The offerors shall verify or obtain all building dimensions required for listing the improvements on the property record card.
- 17.3. Depreciation shall be estimated based on the actual and effective age, physical condition, grade, functional utility, locational obsolescence, and all other factors that may result in loss of value. The determination of depreciation shall be developed from sales of various classes of property within Fairfield County. A study of all sales which have taken place for the 36 months prior to the tax lien date shall be conducted and analysis made of the indicated depreciation from those sales. That analysis shall then be compared to any tables proposed for use within Fairfield County. It shall be the Offeror's responsibility to consider each type of depreciation in a meticulous and uniform manner. A depreciation table shall be created

specifically for use in Fairfield County. The offerors shall conduct a study by analyzing verified sales of real property which took place over the thirty-six (36) months prior to the tax lien date. The study shall use statistical measures to demonstrate that the table is accurate and appropriate for use in Fairfield County. Periodic testing of depreciation applications shall be made by the offerors to ensure the proper and uniform application of the depreciation.

- 17.4. The offerors shall take photographs of each appraised parcel and provide a minimum of two (2) high resolution photographs, satisfactory to the County, of each dwelling capturing (front/side & rear/opposite side) of each dwelling, and one (1) high resolution photograph of any major outbuildings. The Offeror shall ensure that these photographs are of good quality and free of obstructions.
- 17.5. Fairfield County will not accept photographs such as those rendered by Google Earth which contain trees, shrubs, vehicles, and other obstructions in the photograph. The photographs are to be taken so as to show the dwelling(s) and/or outbuilding(s) clearly without physical obstruction.
- 17.6. The preference from the County is to have each photograph electronically linked to the geo location of the dwelling or to the geo location of the outbuilding that is captured in the photograph. All photographs shall be electronically tied to the subject parcel. All splits and combinations shall be taken into consideration at the time of delivery. The County will provide the Offeror with an up-to-date GIS parcel layer.
- 17.7. The County shall have full and continued use of these photographs.

## **18. APARTMENT PROPERTY**

- 18.1. All apartment properties or structures with four (4) or more dwelling units shall be inspected and appraised from schedules and guidelines developed by the offerors and approved by the County. All apartment units shall be valued on both the sales comparison approach and the income approach so that it is necessary that the offerors conducted a comprehensive rental survey of the apartment units in Fairfield County in order to support the income approach to value. In addition, the offerors shall contact local financial institutions as well as those that operate on a regional and national basis, and other resources, to provide financing to apartment units in order to develop an appropriate capitalization rate.
- 18.2. Special care shall be taken in the valuation of various kinds of subsidized apartments, including the Low Income Housing Tax Credit (LIHTC) properties to assure that they are valued in accordance with the most recent rulings of the Ohio Supreme Court including, but not limited to, the ruling in the case of *Woda Ivy Glen Ltd. Partnership v. Fayette Cty. Bd. of Revision*, 121 Ohio St.3d 175, 2009-Ohio-762. These subsidized apartments shall be valued utilizing an income

approach to value exclusively. Consequently, the offerors shall develop appropriate capitalization rates for subsidized units that are supported.

- 18.3. A site plan shall be drawn by the offerors for all apartment complex parcels showing all structures in proper size and relative location, including dimensions and number of stories. A site plan shall not be required for small multi-family properties where the structure type can be shown on the property record card sketch.
- 18.4. The offerors qualified appraisal personnel shall determine the physical condition and functional utility factor for each structure. The qualified appraiser shall consider the application of economic obsolescence, and its effect on the total improvement value. The factor shall be recorded on the property record card.
- 18.5. The income approach to value shall be processed and considered by the offerors in arriving at the final estimate of true cash value.
- 18.6. The offerors shall take photographs of each appraised parcel and provide a minimum of three (3) high resolution geo-referenced photographs of each apartment building capturing three (3) sides of each building. The Offeror shall ensure that these photographs are of good quality, and free of obstructions, and the resolution of such photographs shall be satisfactory to the County.
- 18.7. The preference of the County is to have each photograph electronically linked to the geo location of the dwelling or to the geo location of the outbuilding that is captured in the photograph. All photographs shall be electronically tied to the subject parcel. All splits and combinations shall be taken into consideration at the time of delivery. The County will provide the Offeror with an up-to-date GIS parcel layer.
- 18.8. The County shall have full and continued use, control, and ownership of these photographs and all electronic or printed images.
- 18.9. The Offeror shall obtain rental data for each type of unit and a breakdown of each unit type available within the apartment complex. The offerors shall verify and confirm that addresses utilized by the County's GIS system are accurate. The Offeror shall also obtain income and expense data from each apartment complex. This data shall be utilized as a primary method of determining the value of apartment complexes supported by the sales comparison and cost approaches.

## **19. COMMERCIAL AND INDUSTRIAL PROPERTY**

- 19.1. Structural features, components, or characteristics of each appraised parcel shall be identified, measured and listed by the offerors. The dates and extent of all major remodeling shall be determined and recorded in the note section of the property record card. Attached improvements, built-in features and yard improvements shall be identified, measured and listed.

- 19.2. The offerors shall provide the County with a standard operating procedure for the assignment of physical, functional, and economic obsolescence to commercial and industrial properties. The standard operating procedure shall illustrate how the offerors shall determine each of the various kinds of obsolescence and also must include a standard worksheet to be prepared by the offerors and that will be retained by the County, demonstrating the uniformity of the various kinds of obsolescence that have been applied.
- 19.3. The offerors shall record the use of each structure and the name of the businesses at the time of inspection on the property record card. Appraisal procedures for listing, measuring, and depreciating commercial and industrial property shall be set forth in a commercial/industrial property appraisal manual developed by the offerors and approved by the County.
- 19.4. A site plan shall be drawn by the offerors for all larger commercial and industrial sites showing all structures in proper size and relative location, including dimensions and number of stories. If all necessary information can be shown on the property record card sketch, a site plan shall not be required.
- 19.5. The offerors qualified appraisal personnel shall verify the physical condition and functional utility for each structure appraised. The appraiser shall consider the application of economic obsolescence and its effect on the total improvement value. The offerors shall provide guidelines for the use of economic and functional obsolescence for commercial and industrial properties. Those guidelines shall be applicable to the County.
- 19.6. Rental income and/or expense data shall be collected on all commercial and industrial property. Commercial valuation models shall be developed by the offerors for the suburban shopping areas and the typical central business district such as downtown retail, retail with apartments above. The valuation models shall be supported by expense data obtained from both rented and owner-occupied structures.
- 19.7. Income capitalization models shall be developed for commercial and industrial property by use, type, and location (neighborhood). Capitalization rates shall be derived from the local market, supplemented by published data and by the experienced and informed judgment of the offerors analysis.
- 19.8. The offerors shall prepare industrial reports for the larger and tax abated industrial properties.
- 19.9. The offerors shall take photographs of each appraised parcel and provide multiple (minimum of 5) high resolution photographs satisfactory to the County of each commercial structure capturing three (3) sides of each building when possible. The Offeror shall ensure that these photographs are of good quality, and free of obstructions.

- 19.10. The Offeror shall ensure that these photographs are of good quality and free from obstructions. The photographs shall include the front of the building, at least two (2) of the sides if possible. In addition, a geo-located photo of the rear of the building is expected.
- 19.11. The preference from the County is to have each photograph electronically linked to the geo location of the dwelling or to the geo location of the outbuilding that is captured in the photograph. All photographs shall be electronically tied to the subject parcel. All splits and combinations shall be taken into consideration at the time of delivery. The County will provide the Offeror with an up-to-date GIS parcel layer.
- 19.12. The County shall have full and continued use, control, and ownership of these photographs.

## **20. AGRICULTURAL IMPROVEMENTS**

- 20.1. All agricultural structures shall be inspected and appraised from schedules and guidelines developed by the offerors from sales in the County, and approved by the County. Farm buildings or outbuildings shall be measured (if necessary), listed and described individually on the property record card.
- 20.2. Dwellings on farm home sites shall be drawn proportionally on the property record card, and all necessary dimensions and identification symbols shall be placed on the sketch. Attachments such as garages and porches shall be clearly shown, dimensioned and labeled.
- 20.3. Structures and other buildings that are not drawn on the property record card sketch shall be noted on a separate general location diagram. A symbol and number shall be used to show the approximate location of these improvements relative to the dwelling also drawn on the sketch.
- 20.4. The home site shall be appraised in the same manner as rural residential parcels. The yard plot or area of land used for residential purposes shall be verified during the data collection phase.
- 20.5. All farm dwellings shall be described and valued in the same manner as other rural residential dwellings, using the same residential schedules.
- 20.6. Consideration shall be given to agricultural outbuildings first individually, concerning their use and adaptability, and then as a group, taking into account the extent their presence adds to the farm value as a unit. The offerors appraiser is expected to exercise sound judgment in the application of functional and economic obsolescence, the object being to arrive at a fair and equitable estimate of contributory value.

- 20.7. The offerors shall prepare a sales analysis of agricultural parcels of property. The Offeror shall establish the value of the land on its productive capability and then determine the contributory value of various types of outbuildings. The schedules utilized in the valuation of agricultural parcels of property shall be accurate and provable.
- 20.8. The offerors shall prepare a comprehensive study of agricultural outbuildings. This study shall be prepared by first making a comprehensive analysis of vacant agricultural land values in the County per land use code. Once the appropriate price has been determined for vacant agricultural land, then all sales containing agricultural outbuildings, but without dwelling units, shall be analyzed to determine the contributory value of the outbuildings. Such study shall be provided to the County along with other support for the development of an agricultural outbuilding schedule.
- 20.9. The offerors shall take photographs of each appraised parcel and provide a minimum of three (3) high resolution photographs of each dwelling capturing three (3) sides of each dwelling. The Offeror shall ensure that these photographs are of good quality, and free of obstructions.
- 20.10. The Offeror shall provide one (1) high resolution photo of any significant outbuilding (10 x12 or 120 square feet or larger).
- 20.11. The preference from the County is to have each photograph electronically linked to the geo location of the dwelling or to the geo location of the outbuilding that is captured in the photograph. All photographs shall be electronically tied to the subject parcel. All splits and combinations shall be taken into consideration at the time of delivery. The County will provide the Offeror with an up-to-date GIS parcel layer.
- 20.12. The County shall have full and continued use, control, and ownership of these photographs.

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

- 21.1. The offerors shall prepare narrative appraisals for those limited market, special use, or single purpose commercial and industrial properties. The County shall determine the number and content of the detailed narratives. The cost, sales comparison and income approaches shall be considered in arriving at the final estimate of property value when sufficient data is available. The deliverables to the County shall include the comparable properties used by the offerors in arriving at the fair market value for each of these special properties. The offerors shall also make appropriate adjustments to the comparable properties to reflect the value. The cost approach alone shall not be satisfactory for these properties. When tax abatements are

involved, the market value of the taxed portions and abated portions shall be clearly marked and supported by appropriate abatement documentation.

- 21.2. Buildings on leased land shall be appraised in a manner similar to improved parcels of land. For appraisal billing purposes, the property shall be categorized by its highest and best use.
- 21.3. The offerors shall appraise and verify the use of, or the continuation of exempt status for all tax-exempt parcels to assist the County in making a final determination of status as of January 1, 2019. 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.
- 21.4. The value of an improvement that 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 property record cards. The market value of mixed-use parcels shall be based on 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.
- 21.5. The offerors shall take photographs of each appraised parcel and provide a minimum of three (3) high resolution photographs of each dwelling capturing three (3) sides of each dwelling when possible. The offerors shall ensure that these photographs are of good quality, and free of obstructions.
- 21.6. The offerors shall provide one (1) high resolution photo of any significant outbuilding that can be reasonable obtained.
- 21.7. The preference from the County is to have each photograph electronically linked to the geo location of the dwelling or to the geo location of the outbuilding that is captured in the photograph. All photographs shall be electronically tied to the subject parcel. All splits and combinations shall be taken into consideration at the time of delivery. The County will provide the Offeror with an up-to-date GIS parcel layer.
- 21.8. The County shall have full and continued use, control, and ownership of these photographs.

## **22. PERFORMANCE STANDARDS/STATISTICAL ANALYSIS**

- 22.1. The offerors shall apply its mass appraisal methods and procedures to all designated parcels in the County. The level of appraisal accuracy and appraisal uniformity shall be measured by statistical reports to be produced by the offerors. The offerors, upon completion of the final review, shall submit to the County results of a formal sales

ratio study. In order to be in satisfactory compliance with this proposal, the offerors shall meet the performance standards as published by the IAAO at the time of signing the contract.

- 22.2. The offerors shall conduct a comprehensive statistical analysis utilizing all of the real estate sales which have taken place in the County from January 1, 2016 through January 1, 2019 utilizing multiple regression analysis, feedback analysis or a similarly appropriate tool to assure that all data is adjusted to the January 1, 2019 tax lien date and analyzed as of that tax lien date.
- 22.3. The statistical analysis shall be conducted by story height, by property grade, by stratified depreciation, by neighborhood, by building material type as well as other measures. The sales ratio, the price related differential, coefficient of dispersion, the coefficient of variation, as well as the IAAO measurement, the Price-Related Bias shall be used.
- 22.4. The statistical analysis shall be prepared at the beginning of the project, which will serve as a baseline for the measurement of improvement achieved by the offerors. Another statistical analysis shall be conducted by the offerors after the schedule contained in the currently existing CAMA system has been updated and modified.
- 22.5. A report shall be developed showing the difference between the results so as to measure the improvement achieved by the offerors.

## **23. COST DATA**

- 23.1. The offerors shall conduct a survey of local building material suppliers and assemble and submit a report of the same to the County. The objective of this survey is to gather data regarding the cost of construction within Fairfield County.
- 23.2. The offerors shall contact companies and individuals in the various building and construction trades and specializations who shall be asked to provide data which shall be assembled and utilized along with market data in the development of a new valuation schedules for the County's CAMA system.
- 23.3. The offerors shall also gather local labor rates. All of the data shall be verified against the cost of construction schedules in the Marshall Valuation Services manual published by Marshall & Swift, and the Robert Snow Means Valuation manual.
- 23.4. Cost schedules shall be developed using local building material suppliers, and appropriate local labor rates. The schedules shall be tested and adjusted as needed. The offerors shall provide documentation of techniques utilized.

## **24. MARKET DATA**

24.1. The offerors shall conduct a comprehensive sales analysis and sales verification program of all of those sales which have taken place within Fairfield County during the years 2016, 2017, and 2018. In addition, the offerors shall seek additional sources of data as it relates to the commercial providers of such data (such as CoStar) and analysis made of sales that have taken place across the State of Ohio, in counties with similar economic and demographic backgrounds as Fairfield County, to give additional support for values.

## **25. INCOME DATA**

25.1. The offerors shall conduct a survey of financial institutions within Fairfield County to determine appropriate loan to value ratios and loan amounts as well as capitalization rates. In addition, the offerors shall investigate sources such as The Dollars and Cents of Shopping Centers, and information from IREM and other providers of financial and statistical information for income producing properties.

25.2. The offerors shall develop schedules of the valuation of commercial, industrial and exempt properties utilizing the income approach to value.

## **26. CORRELATION OF VALUES**

26.1. The offerors shall consider, as appropriate for the various types of properties being valued, each of the 3 approaches to value and shall correlate the values where multiple approaches were used so as to arrive at the best, supportable and most accurate value for each parcel of commercial, industrial, and exempt properties.

## **27. APPRAISAL QUALITY CONTROL**

27.1. The County must be able to demonstrate to property owners that the project is being conducted in a highly professional manner, and is supported by County specific data. The offerors shall submit a quality control plan specifying the quality control procedures to be implemented during the project.

## **28. USE OF COUNTY RECORDS**

28.1. The County shall provide the offerors with an up-to-date GIS parcel layer. In addition, all zoning maps, tax records, data and information in the possession of the County that are relevant to the work to be carried out by the offerors shall be made available to the offerors.

28.2. No maps, property record cards, inventory content sheets, records, forms or questionnaires shall be removed from the County office in which they are stored without the prior consent of the County's staff member responsible for these records. The offerors shall, in cooperation with the County, employ a system for keeping an

accurate account of all maps and records removed from the County office in which they are stored. Such maps and records shall be carefully preserved, and shall be returned to their proper storage as soon as use of them is completed.

- 28.3. The County and the offerors shall coordinate with each other such that they will each provide to the other information that comes into their knowledge regarding any ownership changes, and parcel splits and combinations on a weekly basis.

## **29. REVIEW**

- 29.1. Prior to finalization of the valuation parameters and models, the offerors shall conduct a one hundred percent (100%) review of the preliminary estimates of value prepared for each parcel of property. The following phase work shall be completed before review documents are printed.

29.1.1. All sales data entry shall be complete in the neighborhood or market area being reviewed.

29.1.2. All preliminary residential and agricultural market analysis shall be completed, tested and evaluated.

29.1.3. All preliminary income and expense analysis shall be complete.

29.1.4. Neighborhood analysis shall be complete, pre-tested on a representative sampling of parcels, and ready for printing of income analysis reports.

29.1.5. All local cost index and depreciation study schedules shall be complete, approved and updated.

- 29.2. The final review shall be conducted by a qualified member of the offerors appraisal staff to develop a final opinion of market value for each parcel of property. The review process shall be used to:

29.2.1. Determine that improvements and land characteristics have been properly valued.

29.2.2. Identify any data entry or transcription errors.

29.2.3. Ensure schedules for computing land value estimates reflect current market value and individual properties have been adjusted to reflect changes in influence factors.

29.2.4. Verify consistent and accurate grading of buildings and improvements within neighborhoods.

29.2.5. Adjust for locational obsolescence or economic factors to better reflect market trends within neighborhoods.

29.2.6. Correlate the indicated value from the approaches used to estimate value.

29.2.7. Ensure each property has been valued in relation to other properties.

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

- 30.1. The offerors shall on or before September 1, 2019, on dates determined by the County, conduct informal hearings with property owners. The County shall notify property owners of the informal hearing dates and the notice provided by the County shall give a phone number to call and schedule a place, time, and date for such hearings. The offerors shall use a telephone log and an informal hearing form for the hearings that shall be approved by the County prior to the time of implementation. The cost of the design and printing shall be the responsibility of the County.
- 30.2. The offerors shall prepare comprehensive documentation reports of all schedules developed and all statistical studies made in order to support valuation to the County and the taxpaying public.
- 30.3. The offerors shall provide a sufficient number, satisfactory to the County, of qualified representatives at these informal hearings 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 offerors supervisor shall be available during all informal hearings, until all complaints and questions from the public are heard and disposed of, to assist in the settlement of disputes, answer questions and defend estimates of value.
- 30.4. The County shall make a public notification of these meetings and helping schedule interviews with taxpayers. If necessary, to accommodate property owners, the offerors shall hold informal hearings on weekends or during evening hours at dates and times to be determined by the County.
- 30.5. Upon completion of the informal hearings, the offerors shall review the appraisal on any property or item on which the valuation may be disputed, and make any necessary corrections to reflect “fair market value.”
  - 30.5.1. Upon completion of the informal hearings, the offerors shall provide a summary report to the County. The report shall include the following:
    - 30.5.1.1. The total number of informal hearings.
    - 30.5.1.2. The number of grievances resolved in sessions.
    - 30.5.1.3. The number of grievances requiring in-field follow-ups.
    - 30.5.1.4. The number of grievances resulting in value changes.
    - 30.5.1.5. The amount of valuation change by property class.
- 30.6. The offerors shall refer mapping questions and corrections to the County or representative for the cadastral map maintenance.

## **31. FORMAL DEFENSE OF VALUES**

- 31.1. The offerors shall provide a qualified appraiser, approved by the County prior to the perspective hearing, to be present at the Board of Revision hearings conducted by the County following completion of the work by the Offeror. The offerors representative shall assist in the settlement of appeals, based on the offerors appraisal.
- 31.2. The offerors shall, at the request of the County, furnish a qualified representative in the event that an appeal from the Offeror's appraisal is filed with the State Board of Tax Appeals or the Court of Common Pleas. The offerors representative shall be familiar with the project and experienced in court testimony. The representative shall be qualified as an expert witness at the hearings. The offerors representative shall further outline the steps taken in the appraisal and give an opinion as to the value of the property involved in the appeal to the County. The offerors shall include the number of days for Formal Valuation Defense within their proposal, and include the daily rate for defense beyond the number of days allocated.

## **32. WORK AND DELIVERY SCHEDULE**

- 32.1. The offerors shall begin work within thirty (30) days after the approval of the contract by the Tax Commissioner. The offerors shall carry on the revaluation without interruption, and shall complete and deliver said work in accordance with a detailed work schedule.
- 32.2. The offerors shall be responsible for preparing all value estimates by March 31, 2019, which shall include the valuation of all new parcels created through January 1, 2019, and all items of new construction which are twenty percent (20%) or greater complete or completed on January 1, 2019. This information shall be included on the property record card when delivered to the County.
- 32.3. Within twenty (20) days after the award of the contract, the offerors shall submit to the County for approval, a detailed work plan 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 the work on that 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 offerors shall submit a personnel allocation chart to the County for review within twenty (20) days of the award of the contract and prior to starting work.
- 32.4. Prior to beginning work, the proposed work plan shall be reviewed with the County at each of the monthly meetings and should be measured against the timeline that has been established for the completion of the project.

- 32.5. The offerors timely performance of the 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 offerors shall be entitled to an extension of the delivery date. The County shall approve any such extension of time and such extension request shall be submitted to the Tax Commissioner.
- 32.6. Within ten (10) working days of the completion of the informal hearings the offerors shall deliver to the County the following items to become permanent records of Fairfield County:
- 32.6.1. Property record cards for each parcel of real estate within Fairfield County.
  - 32.6.2. Neighborhood analysis forms and delineation schedules and maps used by the Offeror in the appraisal of land showing unit land prices, market data and factors used in determining land values.
  - 32.6.3. A final residential sales printout listing all property transfers within Fairfield County throughout the process of the revaluation program.
  - 32.6.4. Any and all supporting data and documentation pertaining to the revaluation of parcels within Fairfield County.
  - 32.6.5. All documentation regarding taxpayer complaints.
  - 32.6.6. All routing maps, street pricing maps, and land pricing maps.
- 32.7. All appraisals, records, and deliverable items that constitute the work of the Offeror shall be completed and delivered to the County within ten (10) days of the conclusion of the Board of Revision hearings. All appraisals, records, and other items which the offerors is required to deliver or prepare hereunder, and all rights in and title thereto, are the sole and exclusive property of the County.
- 32.8. The project shall be considered complete at the close of the final Board of Revision hearing immediately following delivery of the completed appraisals and records to the County. However, completion of the project does not release the Offeror of its obligation to aid and assist the County in the event any assessment is appealed to the State Board of Tax Appeals or to the Court of Common Pleas.

### **33. INSURANCE**

- 33.1. The offerors agrees to defend and indemnify the Auditor, the County, and their respect employees, agents, , and representatives against any and all losses, costs, damages, suits, claims, demands, actions and expenses occasioned by or rising out of any accidents or occurrences, or acts or omissions, causing or inflicting injury and/or damage to any person or property arising from the offerors performance or nonperformance of the contract by any of the offerors agents, employees, representatives, or officers.
- 33.2. The offerors 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 one person and one million dollars (\$1,000,000) for any one accident and with limits of one million dollars (\$1,000,000) for property damage to protect the County, the County, and their respect 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. The offerors shall carry worker's compensation in compliance with State law. The Contractor will provide professional liability (errors and omissions) insurance of at least \$1,000,000 per claim and in the aggregate.

- 33.3. Certificates or copies of said policies shall be filed with the County Clerk of Fairfield County. The offerors shall also give the County any notice of the cancellation of any insurance policies providing coverage under the terms of this section.

#### **34. OFFICE SPACE, FURNISHING, EQUIPMENT AND SERVICES**

- 34.1. The County shall furnish adequate office space during the duration of the revaluation program. The offerors shall equip, furnish and absorb any expenses in running said office space.

#### **35. COMPENSATION AND MONTHLY APPRAISAL BILLING PROGRESS REPORTS**

- 35.1. The offerors shall propose and submit to the County a proposed schedule of payments for the services to be rendered under the contract. The final system for the payment of fees earned and owing under the contract shall be determined by the County.
- 35.2. The County shall withhold a retainage amount of ten percent (10%) from all payments otherwise owed to the offerors ("Retainage") until satisfactory completion of all work, the determination of which shall be in the sole discretion of the County. Upon completion and delivery of the finished reports, the County shall pay the offerors eighty percent (80%) of the Retainage. After the payment of eighty percent (80%) of the Retainage, the remaining Retainage shall be withheld by the County for final disposition of complaints as to assessments based on appraisals made under this proposal and arising in the period allowed by law for filing of such complaints in the year following the completion of the appraisal program. Such remaining Retainage will be paid to the offerors upon completion of all work required within this RFP to the satisfaction of the County.
- 35.3. Monthly payments, less the Retainage, shall be due and payable within thirty (30) days of the billing date unless approval of payment or any part thereof if withheld by the County, in which event, the County shall promptly notify the Offeror in writing giving the specific reason(s) for withholding payment or a portion thereof.

- 35.4. The County and the Tax Commissioner shall have the option to inspect all work that has been declared for payment on the monthly appraisal billing progress report. This inspection may include the production of computer reports, table listings, and property record card prints during times that are reasonable and convenient to both parties and shall not necessarily cause any undue delays in the progress of the project.

**36. RELATIONSHIP OF PARTIES; NO SUBCONTRACTING**

- 36.1. The relationship of the offerors to the County shall be that of an independent contractor, and no principal-agent or employee-employer relationship will be created by contract. The Contractor will not assign, transfer, or subcontract any work to be performed hereunder without the written approval of the County and the Tax Commissioner, the permission for which may be withheld in the discretion of either the County or the Tax Commissioner. The offerors shall comply with all applicable Federal, State and local laws, rules and regulations during the performance of the work outlined.

**37. CONTRACT**

- 37.1. The attached contract shall be entered into between the offerors and the County of Fairfield County. The offerors 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 fully incorporated into the contract.
- 37.2. The County is obligated only to pay such periodic payments under the 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 Real Estate Assessment Fund.
- 37.3. The contract shall in no way be effective until approved by the Tax Commissioner of the State of Ohio.

**38. INTERPRETATION**

- 38.1. No interpretations of the meaning of these specifications shall be made orally to any Offeror.
- 38.2. Any request for interpretation shall be made in writing and communicated as set forth in Section 3, above.
- 38.3. To be given consideration, the request must be received at least ten (10) days prior to the last day for receiving proposals. The County's response shall be sent to all firms receiving the RFP.

38.4. Any and all such interpretations and any supplemental instructions which the County 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.

**39. PROPOSAL EVALUATION AND NOTIFICATION**

39.1. The County shall conduct a fair evaluation of each proposal submitted.

39.2. The County will evaluate the capability and the approach each Offeror shall take to complete the revaluation program. The County believes it is important to incorporate technology into this process, rather than simply repeating a data gathering effort.

39.3. The County estimates this evaluation process shall take approximately thirty (30) days. The County requests all potential Offerors refrain from any contact with the County and/or the County's staff during this evaluation period.

39.4. The County shall at the conclusion of the evaluation notify each Offeror who submitted a proposal of the decision of the County.

**40. DISPUTES**

40.1. The services to be provided hereunder are to be provided exclusively in Fairfield County, Ohio and any litigation related to or brought in connection with this RFP, the services to be provided hereunder, or the contract entered into pursuant to this RFP shall be brought exclusively in either the Municipal or Common Pleas Courts located in Fairfield County, Ohio and in no other state or federal court.

**41. CONTRACT**

41.1. The offerors shall sign a contract that, amongst other things, incorporates all of the terms and conditions set forth in this RFP.

**42. OWNERSHIP**

42.1. The County shall own all right, title, and interest in and to the documents and all other work product and deliverables produced by the offerors hereunder.

## ATTACHMENT 1

### Evaluation Criteria

The evaluation of each proposal will be broken into three sections, Requirements of the RFP, Technical and Cost.

Each Proposal meeting the minimum requirements of the RFP will be evaluated and based on a scoring ratio of 80:20 with the 80 percent referring to the Technical portion, and 20 percent referring to the Cost portion. There will be a total of 1000 Proposal Points possible, 800 for the Technical portion and 200 for the Cost portion.

**Technical Proposal Points =**

Each Proposals Technical Score / Highest Number of Technical Points scored x 800.

**Cost Proposal Points =**

Lowest Proposal Cost / Each Proposal Cost x 200.

**Total Proposal Points =**

Technical Proposal Points + Cost Proposal Points.

**Requirements.** Attachment Two provides requirements the County will use to evaluate the Proposals, including any mandatory requirements. If the offeror's Proposal meets all the mandatory requirements, the offeror's Proposal may be included in the next phase of the evaluation. In the case of any requirements for a team of people the offeror is proposing, the offeror must submit a team to do the work on the Project that collectively meets all the team requirements. However, the experience of multiple candidates may not be combined to meet a single requirement. Further, previous experience of the candidate submitted for a Project Manager position may not be used to meet any other team member requirements. Each candidate proposed for the Project team must meet at least one of the requirements. This RFP asks for responses and submissions from offerors, most of which represent components of the requirements in Attachment Two. While each requirement represents only a part of the total basis for a decision to award the Contract to an offeror, a failure by an offeror to make a required submission or meet a mandatory requirement normally will result in a rejection of that offeror's Proposal. The value assigned above to each requirement is only a value used to determine which Proposal is the most advantageous to the County in relation to the other Proposals that the County received. It is not a basis for determining the importance of meeting that requirement. If the County does not receive any Proposal that meets all the mandatory requirements, the County may cancel this RFP. Alternatively, if the County believes it is in its interest, the County may continue to consider the highest-ranking Proposals despite the Offeror's failure to meet all the mandatory requirements. In any case where no Proposal meets all the mandatory requirements, it may be that an upper ranking Proposal contains a failure to meet a mandatory requirement the County believes is critical to the success of the RFP's objectives. When this is so, the County may reject that Proposal and consider lower ranking Proposals. Before doing so, the County may

notify the offeror of the situation and allow the offeror an opportunity to cure its failure to meet that mandatory requirement. If the offeror cures its failure to meet a mandatory requirement that the County has deemed critical to the success of the RFP's objectives, the County may continue to consider the offeror's Proposal. However, if the offeror is unwilling or unable to cure the failure, its Proposal may be rejected. The County then may continue to consider the other remaining Proposals, including, if the County so chooses, Proposals that ranked lower than the rejected Proposal.

**Technical Evaluation.** The County will evaluate each Proposal it has determined is timely, complete, and properly formatted. The evaluation will be scored according to the requirements identified in this RFP, including the requirements in Attachment 1 and 2. Other attachments to this RFP may further refine these requirements, and the County has a right to break these requirements into components and weight any components of a requirement according to their perceived importance.

The County also may have the Proposals or portions of them reviewed and evaluated by independent third parties or various County personnel with experience that relates to the work or to a criterion in the evaluation process. Additionally, the County may seek reviews from end users of the Project or the advice or evaluations of various County personnel that have subject matter expertise or an interest in the Project. The County may adopt or reject any recommendations it receives from such reviews and evaluations or give them such weight as the County believes is appropriate.

During the technical evaluation, the County will calculate a point total for each Proposal that it evaluates. At the sole discretion of the County, it may reject any Proposal receiving a significant number of zeros for sections in the technical portions of the evaluation. The County may select those offerors submitting the highest rated Proposals for the next phase in the evaluation. The number of Proposals that advance to the next phase will be at the County's discretion. Regardless of the number of Proposals selected, they always will be the highest rated Proposals from this phase.

At any time during this phase, in the County's sole discretion, it may ask an offeror to correct, revise, or clarify any portions of its Proposal.

The County will document all major decisions and make these a part of the Contract file, along with the evaluation results for each Proposal considered.

**Cost Evaluation.** Once the technical merits of the Proposals are considered, the County may consider the costs of one or more of the highest-ranking Proposals. But it is within the County's discretion to wait until after any interviews, presentations, and demonstrations to evaluate costs. Also, before evaluating the technical merits of the Proposals, the County may do an initial review of costs to determine if any Proposals should be rejected because of excessive cost. Further, the County may reconsider the excessiveness of any Proposal's cost at any time in the evaluation process.

The County may select one or more of the Proposals for further consideration in the next phase of the evaluation process based on the price performance formula contained in Attachment Two. The County may require some offerors to interview, make a presentation about their Proposals, or demonstrate their products or services. Typically, these discussions provide an offeror with an opportunity to do one or more of the following:

- Clarify its Proposal and ensure a mutual understanding of the Proposal's content;
- Show the features and functions of its proposed hardware, software, or solution; and
- Demonstrate the professionalism, qualifications, skills, and work knowledge of its proposed candidates.

The County will schedule the presentations, demonstrations, and interviews at its convenience and discretion. The County will determine the scope and format of any such presentations, demonstrations, and interviews and may record them. If the County moves more than one offeror to this phase, the scope and format of these presentations, demonstrations, and interviews may vary from one offeror to the next, depending on the particular issues or concerns the County may have with each offeror's Proposal. The County normally will not rank interviews, demonstrations, and presentations. Rather, if the County conducts the interviews, demonstrations, or presentations as part of the technical evaluation, the County may use the information it gathers during this process in evaluating the technical merits of the Proposals.

**ATTACHMENT 2**

**Fairfield County 2019 Reappraisal Project  
Evaluation Form**

**Offeror Name:** \_\_\_\_\_

**SECTION 1 – REQUIREMENTS OF RFP**

**Yes    No**

- \_\_\_    \_\_\_    Sealed Proposal stamped as received prior to April 3, 2017, 10:00 am.
- \_\_\_    \_\_\_    Submission includes 4 Hard copies and 1 digital copy of proposal.
- \_\_\_    \_\_\_    Submission includes sealed envelope containing Cost Proposal.
- \_\_\_    \_\_\_    Submission includes sealed envelope containing Alternative Cost Proposal.
- \_\_\_    \_\_\_    Submission included sealed envelope containing Bid Bond.
- \_\_\_    \_\_\_    Submission includes Proof of Insurance.
- \_\_\_    \_\_\_    Offeror is listed as authorized by Tax Commissioners to conduct mass appraisal.

Additional Notes: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**SECTION 2 – TECHNICAL EVALUATION**

**1) RFP REQUIREMENTS:**

<b>Weight</b>	<b>Does Not Meet</b>		<b>Meets Appropriately</b>		
<b>10</b>	0		5		
Notes:					

**2) QUALIFICATIONS:**

- Authorized by State of Ohio Tax Commissioner to perform mass appraisals in Ohio.
- How long has Offeror been providing countywide Appraisals?
- Successfully completed a Reappraisal equal to or larger than the one called for in this project in the past 5 Years.
- Offeror’s Organization, Financial Resources and staff levels.

<b>Weight</b>	<b>Does Not Meet</b>	<b>Meets Minimally</b>	<b>Meets Appropriately</b>	<b>Exceeds</b>	<b>Greatly Exceeds</b>
<b>15</b>	0	3	5	7	9
Notes:					

**3) EXPERIENCE:**

- Client Reference for previous projects - Customer satisfaction.
- Familiarity and Capable of working with hardware and software of the type used by the Fairfield County County’s Office.
- Experience with IAS systems.
- Experience specifically working with iasWorld.

<b>Weight</b>	<b>Does Not Meet</b>	<b>Meets Minimally</b>	<b>Meets Appropriately</b>	<b>Exceeds</b>	<b>Greatly Exceeds</b>
<b>15</b>	0	3	5	7	9
Notes:					

**4) PROJECT STAFF:**

- Detailed Organizational Chart.
- Project Manager has experience within the past 6 years with a countywide Reappraisal of 70,000 or more parcels.
  - Qualifications
  - Percent of time dedicated to this reappraisal project.
- Full-time employees / Part-time employees
  - Total Number assigned to this project.
  - Qualifications / course work completed for each employee.
  - Percent of time dedicated to this reappraisal project.
- Residential/Agriculture appraisers have minimum experience of 3 years in appraising residential/agricultural properties within the past 5 years.
- Commercial appraisers have minimum experience of 5 years in appraising commercial properties within the past 5 years.
- Strength of contingency plan.
- Resumes included for all key personnel.

<b>Weight</b>	<b>Does Not Meet</b>	<b>Meets Minimally</b>	<b>Meets Appropriately</b>	<b>Exceeds</b>	<b>Greatly Exceeds</b>
<b>10</b>	0	3	5	7	9
Notes:					

**5) PROJECT METHODOLOGY:**

- Start / Completion dates identified for all phases of reappraisal.
- Be able to begin work within 30 days of issuance of contract.
- QA / QC Plan.
- Property Valuation Process.
- Market and Modeling / Market Regression Analysis.
- Describe how will re-build County’s Land, Building Costs and Building costs.
- Use of Photography & Imagery – Street Level, Oblique, and Orthophotography.
- Support of Values.
  - Informal Hearings.
  - BOR.
  - Notifications.
  - Public Relations.
  - Property Survey.

<b>Weight</b>	<b>Does Not Meet</b>	<b>Meets Minimally</b>	<b>Meets Appropriately</b>	<b>Exceeds</b>	<b>Greatly Exceeds</b>
<b>35</b>	0	3	5	7	9

Notes:

**6) DELIVERABLES:**

- Proposed time table for all deliverables.
- Property Record updates.
- Report of Exempt and Commercial Properties.
- Sales Ratio Study.
- Neighborhood Analysis
- Abstract.

<b>Weight</b>	<b>Does Not Meet</b>	<b>Meets Minimally</b>	<b>Meets Appropriately</b>	<b>Exceeds</b>	<b>Greatly Exceeds</b>
<b>15</b>	0	3	5	7	9

Notes:

**SECTION 3 – COST EVALUATION**

After the completion of Sections 1 and 2, the Cost Proposals for all proposals that met the RFP Requirements, will be opened and applied total evaluation as outlined below.