

Assessing Services Quote/Contract



*Prepared for:*

\_\_\_\_\_ Sandisfield ,  
MA \_\_\_\_\_

FY 2023 Assessing Services Support

12-21-21

## Assessing Services Quote/Contract

Mayflower Valuation, Ltd. is pleased to offer the following Quotation/Contract for the schedule of services detailed below:

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### Phase 1- Cyclical Inspections:

At the direction of the Principal Assessor provide cyclical Inspections of specific properties as identified by client; work shall commence on or about 2-1-22. The number of inspections is estimated to be 10% of Real Property Parcels / DOR Guidelines.

Inspections shall be conducted by trained professional staff following the DOR COVID protocols established in 2021 (no interior inspections unless absolutely necessary / no appointments required / masks, vaccination and social distancing guidelines will be adhered to). These inspections will be conducted as outlined below:

- I. Each property will be visited, and presence announced to owners, if owners are home, they will be questioned on interior (upgrades, basements, # baths, etc.)
- II. All Mayflower employees will be neatly dressed, and have picture ID's displayed, our vehicles will have Assessor Department identification as well.
- III. Premises and shall be laser measured
- IV. Yard items will be reviewed and measured
- V. Physical conditions, grades and changes will be noted on Property Record Card (PRC)
- VI. Changes shall be neatly recorded on PRC, including updated sketch on PRC as required
- VII. Property will be digitally photographed, and emailed to assessor
- VIII. Completed cards will be turned over to Assessor on a weekly basis
- IX. Field Work and data collection will be overseen by Mayflower Sr. level personnel
- X. This work does not include data entry, this can be contracted for if needed
- XI.

Note: we use the most experienced, well trained, and professional data collectors in the industry, we typically average 20-30 cards per day depending on weather, location and condition of raw data.

The Assessors department will provide the hard copies of the PRC's for the properties it wants inspected to Mayflower; and send a form letter to each property owner informing them that cyclical inspections will be performed at their location, as required by the DOR, following the established Covid guidelines summarized above. Mayflower can provide a draft of this letter format as requested.

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### **Phase 2 – Building Permit Inspections:**

At the direction of the Principal Assessor provide Building Permit Inspections of specific properties for permits issued in Calendar Year 2021 as identified by Assessor; work shall commence on or about January 2022.

Inspections shall be conducted by trained professional staff following the DOR COVID protocols established in 2021 (no interior inspections unless absolutely necessary / no appointments required / masks, vaccination and social distancing guidelines will be adhered to). These inspections will be conducted as outlined below:

- I. Each property will be visited, and presence announced to owners, if owners are home, they will be questioned on interior renovations. Pictures may be submitted by homeowner- (upgrades, basements, # baths, etc.)
- II. All Mayflower employees will be neatly dressed, and have picture ID's displayed, our vehicles will have Assessor Department identification as well.
- III. Improvements shall be laser measured if required.
- IV. New Yard items will be reviewed and measured
- V. Physical conditions, grades and changes will be noted on Property Record Card (PRC)
- VI. Changes shall be neatly recorded on PRC, including updated sketch on PRC as required
- VII. Property will be digitally photographed, and emailed to assessor if necessary
- VIII. Completed cards will be turned over to Assessor on a weekly basis
- IX. Field Work and data collection will be overseen by Mayflower Sr. level personnel
- X. This work does not include data entry, this can be contracted for if needed.

The Assessors department will provide the hard copies of the PRC's for the building permits it wants inspected to Mayflower; and send a form letter to each property owner informing them that permit inspections will be performed at their location, as required by the DOR, following the established Covid guidelines summarized above. Mayflower can provide a draft of this letter format as requested.

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### **Phase 3- Interim Adjustment:**

At the direction of the Principal Assessor, commencing on or about 3-1-2022, provide Fiscal Year 2023 Interim Valuation Adjustment services as detailed below:

- I. Review the preliminary LA3
- II. Verify and adjust NAL Codes per DOR standards
- III. Analyze and review sales information for previous two calendar years.
- IV. Verify non-arm's length coding.

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- V. Implement new land valuations and adjust all cost schedules as indicated by analyses in order to produce new valuations meeting the Commissioner of the Department of Revenue's statistical requirements for Certification of Values
  - VI. Uploading of the LA3, LA13, and LA15 into Gateway
  - VII. The above *does not* include completion of the New Growth Template.
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### Phase 4 - Personal Property:

- I. Review and enter Form of List, and inspect new personal property business accounts and do cyclical inspections for Personal Property.
  - II. The Town shall be responsible for mailing of Form of Lists, and shall have all returned copies available for our use
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### Phase 5 – Misc. Services :

- I. Provide assistance with FY 2023 abatements as requested.
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### Phase 6 – Class 504 Appraisal:

- I. Provide appraisal of (1) Personal Property class 504 account (s). Following DOR 50/50 guidelines and utilizing the Handy Whitman Index of Values.
  - II. Town shall provide Mayflower all required detailed FOL's and Utilities Detailed list of Assets, CWIP, ad New Growth.
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### Phased Cost Breakdown:

FY 2023 Phase 1- Phase 6- The cost will be \$ 10,050.00

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*Please see Quotation/Contract Addendum for all Terms & Conditions.*

Feel free to contact us with any questions or clarifications, we appreciate the opportunity to provide this contract/quotation.

Sincerely,

James Quackenbush

VP Logistics

Mayflower Valuation, LTD

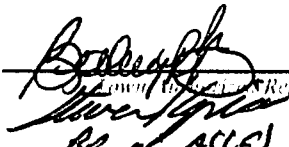
FED ID #: 20-1445049

*Pursuant to Massachusetts General Laws, Chapter 62C, Section 49A, I certify under penalties of law, that Mayflower Valuation, Ltd., to the best of my knowledge and belief, has filed all Massachusetts State tax returns and paid all Massachusetts state taxes required under law.*

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**Authorized Municipal Representative - Please sign below to indicate your approval and acceptance and return to us via e-mail.**

Accepted by:

  
Town Representative Signature  
Kathleen Burrows  
Pr. of ASSE.

Date: 2/17/2022

This contract is pending approval  
of funding at Special Town Meeting 2/26/2022

Jaqueline Bitso  
Principal Assessor

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### *Mayflower Valuation - Quotation/ Contract Addendum 2022*

| Ref | Description                                                                                                                                                                                                                                                                                                                            | Applies (X) |
|-----|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------|
| 1   | <i>Invoices will be accepted by Town via - U.S. Mail or e-mailed &amp; Terms will be NET 30 Days from electronic receipt.</i>                                                                                                                                                                                                          | X           |
| 2   | <i>All Printing of cards for inspections will be done by Town, unless otherwise noted.</i>                                                                                                                                                                                                                                             | X           |
| 3   | <i>The Town will provide Mayflower with a letter of Authorization to share with residents for on-site inspections</i>                                                                                                                                                                                                                  | X           |
| 4   | <i>If gas prices exceed \$4.10/ gallon our daily rate for field work will increase by 50\$ to offset un-anticipated increase.</i>                                                                                                                                                                                                      |             |
| 5   | <i>The Town will facilitate remote computer access so we can connect remotely through our "Go To MY PC.Com" account. (The prices included in this proposal are based on the ability for us to connect remotely, if not provided costs will be higher).</i>                                                                             | X           |
| 6   | <i>DOR Covid protocols will be followed for Cyclical and Permit Inspections- Houses will be viewed from the outside, and owner Questioned about interior changes/ modifications. Pictures can be also provided by owners. If owner wants an interior inspection we will provide, as long as residents are masked &amp; vaccinated.</i> | X           |
| 7   | <i>No more than 10% of visits will be done by appointment if the contract provides for payment on a "per card" basis.</i>                                                                                                                                                                                                              |             |
| 8   | <i>The town will hold Mayflower Valuation Harmless from any and all legal actions, we act as advisors only, all decisions and changes are at the discretion and with the approval of the Town/Assessor.</i>                                                                                                                            | X           |
| 9   | <i>Town agrees to have all required information ready and available when MF shows up on site to conduct data entry or analysis; including a work space, computer with internet access and a functioning printer.</i>                                                                                                                   | X           |
| 10  | <i>This Quotation is valid for 30 days unless otherwise noted.</i>                                                                                                                                                                                                                                                                     | X           |
| 11  |                                                                                                                                                                                                                                                                                                                                        |             |
| 12  |                                                                                                                                                                                                                                                                                                                                        |             |

## Assessing Services Quote/Contract

~~~~~ End of Quotation ~~~~~