Service Delivery Plan

Revaluation Project Timeline

October 2020 - October 2021

- Commercial Data Collection and Data Entry
 - o Perform inspections of all commercial properties and neighborhoods as per RFP (page 24)
 - o Income & Expense Statements provided by property owners and input into a Commercial Valuation Spreadsheet
 - Field inspect commercial sales and listings, and input data into the Commercial Valuation
 Spreadsheet
- Residential Data Collection and Data Entry
 - o Perform inspections of all residential properties and neighborhoods
 - After initial attempt to gain entry, if there is a refusal or no answer to Call back notice,
 Munival sends out notification letter on a format approved by the Assessor
 - o Field inspect properties as needed
 - Make corrections to the CAMA
- Market Data Research and Analysis
 - o Review PwC market survey and regional sales reporting current overall capitalization rates
 - o Review CoStar market rent and vacancy rates for retail and office properties
 - Develop market income and expense tables (market rents, vacancy, operating expenses, and capitalization rates)
 - Review with the Assessor
- Sales Research and Verification
 - Study all sales occurring during the two-year period prior to revaluation and all current listings
 - Field inspect residential sales (land and improved) and listings
 - o Investigate sales with MLS, owners, realtors, banks, and other available sources

July 2021 - August 2021

- Commercial Valuation Analysis
 - Apply market rents, vacancy, operating expenses, and capitalization rates to each incomeproducing property in the Commercial Valuation Spreadsheet
 - Field review income approach values
 - o Review income values with the Assessor
 - o Input income tables into CAMA and value every income-producing property
 - Update building cost tables in the CAMA (Marshall Valuation Service and sales extraction
 - Develop land tables in the CAMA (vacant land sales and extraction from sales and income values)
 - Arrive at cost values
 - Correlate cost values and income values in the CAMA
 - o Field review commercial values
- Residential Valuation Analysis
 - Review the Land Value Map and neighborhood delineations with the Assessor



- Input land tables into CAMA
- Review land influence factors on individual parcels for items such as wetlands, topography and zoning non-conformity
- Field review land values
- Review land values with the Assessor
- o Study new construction in Town to identify local building construction costs new
- o Extract depreciated building values from recent sales of improved residential properties
- o Review Marshall Valuation Service for cost trends and current residential construction
- Review building cost tables with the Assessor (new construction in Town, sales extraction, and Marshall Valuation Service)
- Update building cost tables in the CAMA
- o Review depreciation tables with the Assessor and update in the CAMA
- Value all residential property in the CAMA, run statistics, review outliers, and discuss with the Assessor
- Field review final residential values
- Review final residential values with the Assessor

August 2021 – October 2021

- Commercial Valuation
 - Watch for new residential sales and adjust model (if necessary)
 - Watch for new commercial sales and adjust the CAMA model (if necessary)
 - Prepare valuation summary sheets for special purpose or regional properties (nursing homes, assisted living, hotels, large office, or retail properties, etc.)
 - Available to meet with top taxpayers prior to informal hearings to explain valuation methodology and gain consensus on value (at Assessor's discretion)

November 2021 –December 2021

- Assessment notices mailed
- Conduct informal hearings meet with owners, answer questions, note concern
- Review value changes with the Assessor
- Finalize residential values
- Prepare Revaluation Manual for the Assessor outlining process
- Consult with town on any court appeals, attend pretrial conferences (Town Hall or Superior Court)
- Repeat residential valuation, statistical analysis, and review as necessary to improve valuation model



Major Project Delivery Milestones

Task	Start Date	Finish Date
Revaluation work to commence not later than	Two (2) weeks after contract signing	
Data Collection to be completed from	July 1, 2021	July 1, 2022
Commercial, industrial, public utility and tax-exempt valuation to be completed & delivered to the Assessor by (except for current building permits)		September 1, 2022
Land study and values set & completed and delivered to the Assessor by		September 1, 2022
Building cost manual completed by		October 1, 2022
Study of market rents, expenses and capitalization factors by		October 1, 2022
Deliver completed CAMA database, property record cards with all measur suggested values to the Assessor according to the fo		ches, pricing and
Assessor completes review and final adjustments made for real property no later than		November 5, 2022
Assessment change notices mailed to comply with requirements of Connecticut State Statues, Section 12-62 (f) by (Munival to pay postage)		November 15, 2022
Informal hearings will take place from	November 29, 2022	December 20, 2022
Notices of results of informal hearings completed shall be completed on forms approved by the Assessor and mailed out (Munival to pay postage), computer filed and final property record cards printed & delivered to the Assessor in alphabetical street order no later than		December 30, 2022



Quality Control & Status Reports

Our qualified reviewers will examine all properties in the field. In addition to reviewing classifications and final values, our reviewers will ensure that the properties are correlated to comparable properties. In addition to providing the Assessor with review dates, we will welcome the Assessor to accompany our reviewers during this phase of the revaluation. We will tabulate weekly totals, then create a monthly status report for the Assessor. This status report will detail the steps in the revaluation process, along with the numerical and percentage completed. We will tailor the report to meet the needs of the Assessor's office.

Revaluation Methodology

Sales comparison, income capitalization and cost are the three approaches to value. For each property, we will use the appropriate appraisal method, as listed below:

- Vacant Land Comparable Sales Approach (and Land Residual Analysis)
- Improved Residential Cost Approach / Comparable Sales Approach
- Improved Commercial Cost Approach / Comparable Sales Approach / Income Approach
- Improved Industrial Cost Approach / Comparable Sales Approach / Income Approach
- Condominium- Comparable Sales Approach
- Special Purpose and Exempt Property Cost Approach / Comparable Sales Approach

Cost Approach

We will determine land values by examining comparable land sales or the land residual analysis. If sufficient comparables within the City do not exist, we will examine sales from comparable regional locations outside Stamford. Replacement cost estimates for the buildings and site improvements are based on Marshall Valuation Service, or a comparable cost service employed by the City. Where available, trended historic costs for recently constructed properties are utilized as additional indications of replacement cost new. We will apply deductions for accrued depreciation, and/or additions for developer's profit based on our physical inspection of the property and market factors.

Sales Comparison Approach

We will examine recent property transfers with improvements similar to the property in question. We compare and adjust these properties to the subject property, and give consideration to such value-influencing variables including time, location, physical characteristics of the site and improvements, financing, and conditions of sale.

Since some properties compete outside Stamford, we will consider and develop sales of properties throughout the state. In addition, we prepare a commercial sales book that details all verified commercial/industrial properties to help ensure accurate valuations, and to provide support during the informal public hearings.



Income Capitalization Approach

The Income Approach is the primary methodology applicable to commercial, multi-family, and industrial properties. This approach is developed through direct capitalization, where an overall capitalization rate is applied to stabilized net operating income. The basis for the analysis is the Income and Expense (I & E) data provided by property owners to the City of Stamford, the Kerin & Fazio proprietary database, CoStar, and MLS. The I&E data is entered into an Excel spreadsheet containing all commercial and industrial properties within the municipality. The properties are identified by property type, location, and physical characteristics. Net operating income is developed by developing market rent, vacancy and operating expenses. Consideration is given to the actual reported income and expenses, reconciled with comparable market data. Capitalization rates are developed by using comparable sales data, the band-of-investment technique, debt-coverage formula and investor surveys. We will apply tax loads based on consultation with the Assessor. We may develop discounted cash flow analyses as additional support if appropriate for the type of property under analysis.

A going-concern analysis is developed for trade related properties such as hotels, skilled nursing facilities, assisted living facilities, and golf courses. This analysis is developed utilizing the net operating income associated with the going concern and deducting the value of personal property and intangibles to conclude a value for the real estate.

Sales Analysis

We use the industry-standard SPSS statistical program to measure and test the statistical reliability of sales. We will conduct the following tests and analyses to ensure a quality revaluation for Stamford:

- Coefficient of Dispersion and Variance tests
- Price Related Differential Testing
- Use of MRA Statistics to measure the effect of variables on value
- Use of MRA Statistics to create valuation models
- Isolating the effect of age, style and location on value
- Statistical Measures of Standard Deviation, Mean, Mode and Median
- Tracking of Listings and sales
- Verification of sales data to include conditions of sale, financing, and terms of transfer

Munival has consistently exceeded performance-based testing standards as required by all revaluation consultants since 2002. Valuation testing ranges indicated less than 10% COD, with less than 3% deviation in PRD testing.

Sales Verification Process

Comparable sales are physically inspected and the terms of sale, purchase price, financing, and special conditions are verified to judge the validity of the sale. The determination of validity is a cooperative effort with the Assessor, and the revaluation supervisor. Since the physical characteristics can change after the



sale, we research and analyze MLS system to verify actual characteristics at the time of sale. If there are ambiguities, information is requested from the listing or buyer's agent. At the Assessor's discretion, sales verification letter can be sent to verify the municipalities data.

Public Relations

We will work with the Stamford Assessor's office to increase public awareness, understanding, and support of the revaluation process. Our experience has shown that public relations issues arise when the public is misinformed or ignored.

At the Assessor's discretion, we suggest leveraging the Web, social media, local media, public meetings, and direct mailings to meet public relations goals throughout the revaluation process. In addition, the data collection process provides opportunities to interact with the public, and our data collectors are trained in effective public relations strategies. In past assignments, our public relations program has included:

- Press releases and outreach through social media
- Direct mailings
- Direct contact and public meetings
- Customer service representatives

Press Releases and Social Media

We suggest a series of press releases and social media outreach to meet the following goals:

- Introduce the revaluation process
- Provide field worker locations
- Present an article explaining the valuation process and the appeal process

Direct Mailings

We would work with the Assessor to generate direct mailings to taxpayers to meet public relations goals. Mailings could coincide with field worker visits, describe the revaluation process, or provide answers to frequently asked questions (see sample brochure on following page).

Direct Contact and Public Meetings

Direct contact is the most important public relations effort, because it cultivates trust and confidence in the community. When field workers inspect a property with care, they help build community trust. Direct contact can also be conducted through local access cable or City meetings. Our public presentations are professionally prepared and executed. We provide handouts, and encourage audience participation. In these presentations, we use an inquiry approach to build support and credibility for the revaluation project.

Our project managers will attend all meetings to outline the revaluation program. They have broad, collective experience that includes course instruction for the Connecticut Bar Association, New Haven County Bar

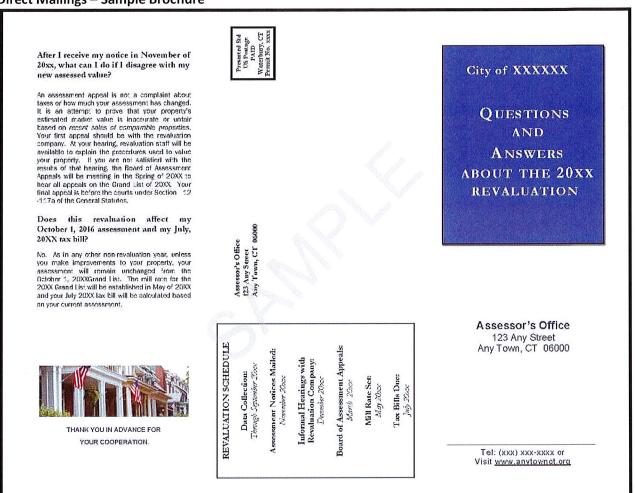


Association, Connecticut Association of Assessing Officers, Northeast Regional Association of Assessing Officers and other local organizations. They also have organized and attended many meetings with community boards, condo associates and citizen groups concerning assessment issues and explanations of the revaluation process.

Customer Service Representatives

An additional important aspect of our public relations capabilities is our in-house customer service, with representatives available during normal business hours. Our representatives are well versed in the revaluation process, and are trained to treat tax payers with respect and courtesy.

Direct Mailings - Sample Brochure





What is the purpose of this brochure?

This brochure serves to inform you that the City of Any Town will be conducting a revaluation of all properly for the Grand List of October 1, 20XX.

Why is Any Town undergoing a revaluation now?

The State of Connecticus, pursuant to Section 12-62 of the General Statutes, requires that the City of Terringion conduct this revaluation for the Grand list of Corboter 1, 2014. The purpose of a revaluation is to eliminate any assessment inequities that may have developed since the implementation of the previous 20XX revaluation. A revaluation ansures fairness and equity in the collection of execute for City purposes. collection of revenue for City purposes

What exactly is a revaluation?

A revaluation is an update of all real property values as of October 5, 20XX. It consists of appraising the value of the properties, both taxable and exempt, using recent sales, building bots and income and expense information of similar properties. All residential, commercial, appartnents, industrial, vacant fand, churches, school buildings and all other real estate will be valued,

How does the City perform a revaluation?

The Town has contracted with Municipal Valuation Services, a Connecticut certified revaluation company, to assist in the revaluation. The tirm will analyze recent sales data,



review the calculated values, and meet with the public to answer questions about the methods utilized and the concluded assessments. Valuation unurzo and ne concluded assessments. Valuation models are developed based on market data collected since the last revaluation. These models are then statistically tested as in required by the State Statutes and the Office of Policy and Management, to verify their ability to accurately and equitably predict estimates of current market value. The Assessor's Office will be directing all activities of the mealuration consultants, and will be oversexing. the revaluation consultants, and will be overseeing quality control and valuation analyses. For current information and the revaluation process updates. visit www.anytownct.org.

What is market value?



The Appraisal institute defines market value as "the most probable price, as of a specified date, in pash, or in specified date, in cash, or in terms equivalent to cash, or in the precision of the precision of the precision of the property rights should sell after a competitive market under all competitive market under under each acting prudently, knowledgeably, and for self-interest, and assuming that neither is under un

are not considered to be "arms length" or market

Does the City want to inspect the interior of my property?

Only recent property sales will be inspected during the 20XX revaluation. A careful inspection and analysis of recent sales helps identify and quantify the features that motivate buyers and sellers in the Tomington real

No other properly inspections are required. A complete inventory of each property in the Clay was undertaken during the 20XX revaluation. Since that time, data accuracy was maintained through an on-going inspection program, which included the physical inspection of all renovated properties and new construction.

Your role as a taxpayer in Any Town is to make sure that the data we have on your property for any property is correct. If you desire an interior inspection, you may phone the Assessor's office to schedule an appointment

If I recently purchased my property, how much time will this field inspection take?

The inspection time varies according to the size and complexity of your home, but in most cases will only take ten to twenty minutes.

Will these field representatives be identified?

Yes. Each representative will be properly identified. You may also call the Assessor's Office and/or the Police Department to verify a representative's

How and when will my taxes be affected by this revaluation?

The revaluation will first affect your July, 20XX tax bill. The amount of your new tax bill is calculated by multiplying, your new assessed value times the new mill rate. Since the new mill rate will not be established until the budgetary process has been completed in May of 20XX, it is not possible to estimate your new tax bill at this time

When will I be notified of my new assessed value?

The revaluation company will send out assessment notices in November, 20XX.

City of Any Town

Assessor's Office 123 Any Street Any Town, CT 06000

Phone: xxx-xxx-xxxx Fax: xxx-xxx-xxxx



Munival/Kerin & Fazio Website – Frequently Asked Questions



Frequently Asked Questions

Why is Any Town undergoing a revaluation now?

The State of Connecticut, periodrit to Section 12-62 of the General Statutes, requires that exich manicipality conduct a revaluation. The purpose of a revaluation is to eliminate any assessment inequities that may have developed since the implementation of the previous revaluation. A revaluation ensures famicas and equity in the collection of revenue for Municipal purposes.

What exactly is a revaluation?

A revaluation is an update of all real property values as of October 1 of the revaluation year, It consists of appraising the value of the properties, both taxable and exempt, using repent sales, building costs and income and expense information of similar properties. All residential, commercial, apertments, industrial, vacant land, churches, school buildings and all other real estate will be valued.

How does the Town perform a revaluation?

The Town has contracted with Municipal Valuation Services, a Connecticut certified revaluation company, to assist in the revaluation. The firm will analyze recent sales data, review the calculated values, and meet with the gublic to answer questions about the methods utilized and the concluded assessments. Valuation models are developed based on market data categord angular invaluation. These models are then statistically lested as required by State Statutes and the Office of Potcy and Management to yearly their ability to accurately and equilearly predict estimates of current market value. The Assessor is Office will be detecting at activities of the revaluation consultants, and will be eversating quality control and valuation analyses.

What is market value?

The Appraisal Institute defines market value as "the most probable price, as of a specified date, in cash, or in terms equivalent to each, or in other precisely revealed terms, for which the specified property rights should sell after a reasonable exposure in a competitive market under all conditions requisite to a fair sale with the buyer and seller each acting prudently, knowledgeably, and for self-interest, and assuming that neither is under undue deress." Sales such as foreclosures and family sales are not considered to be "arms kingth" or market transactions.

Will field representatives be identified?

Yes. Each representative will be properly identified. You may also call the Assessor's Office and/or the Police Department to verify a representative's identity.

How and when will my taxes be affected by this revaluation?

The revaluation will first affect your July tax bit. The amount of your new tax bit is calculated by multiplying your new assessed visite times the new mill rate. Since the new mill rate will not be established until the budgetary process has been completed in May, it is not possible to estimate your new tax bill at this time

When will I be notified of my new assessed value?

The revaluation company will send out assessment notices at the end of the year

After I receive my notice in November, what can I do if I disagree with my new assessed value?

An assessment support is not a complaint about taxes or how much your assessment has charged. It is an attempt to prove that your property's estimated market value is inaccurate or unfair based on recent sales of comparable properties. Your first appeal should be with the revaluation company. At your hearing, revaluation staff will be available to explain the procedures used to value your property. If you are not satisfied with the results of that hearing, the Board of Assessment Appeals will be meeting in the Spring to hear all appeals on the Grand List. Your final appeal is before the courts ender Section 12-117a of the General Statutes

Recent News

Kerin to Present at Assessor's Fall Symposium

Chris Kerin will be among the presenters at the 24th Annual Fall Symposium spansared by the Connecticut Association of Assessing Officers. He will be discussing the recent Watgreen's Supreme Court decision and its impact on ad valorem taxation

Gorham Island Office Property Sold for \$23M

The 44,438 square foot office building in Westport, Connecticut located at 1

Garbam Island sold recently for \$23,190,000. The transaction was recorded on June 18, 2018 with Gorham Island, LLC as the seller and Maplewood Gorham Island, LLC as the buyer.



Dolce Hotel in Norwalk Sold to New

The Ooke Hatel of Norw Connecticut sald on June 4, 2016 for \$16,000,000.

The sprawling 3-building property, resting on 66.46 acres of land in western Norwalk, was purchased by New York based Queens Plaza North, LLC.



Harlford County Flexilindustrial Market Overview

The Hartford County Flex/Industrial Market is comprised of 115,070,000 square feet of inventory. As of mid-2nd Quarter 2018 the vacancy rate in Hartford County is 5,2%, 40 basis points lower than the 2nd Quarter 2017 rate, and 226 basis points lower than the ten year average.

View All Real Estate News



Years in Service

MuniVal was originally organized in 2004 under the name Commercial Revaluation Services and is an outgrowth of the vision of Christopher Kerin, MAI and Michael Fazio, MAI. After successfully completing several commercial revaluations, our clients requested that we expand our services to also include residential properties. This prompted a name change to Municipal Valuation Services, LLC. MuniVal has been providing government revaluation services to Connecticut municipalities for the past 15 years.

Company Financial Statements

Municipal Valuation Services, LLC is a privately held company and would gladly provide our financials outside of the public RFP process upon your request.



Connecticut Revaluation Certification



Contractor's Statement

Contractor's Statement
Pursuant to Section 103.1 of the Stamford Code of Ordinances, I hereby provide the following:
If a joint venture, trustee, partnership, limited liability company or partnership, the names and addresses of all joint ventures, beneficiaries, partners or members:
Michael Fazio ~ 1495 Fairfield Beach Road, Fairfield, CT
Christopher Kerin ~ 801 Eleven O'Clock Road, Fairfield, CT
David Herbst - 75 Sedan Terrace, Fairfield, CT
If a corporation, the names and addresses of all officers, and the names and addresses of all parties owning over 10% of its common stock or over 10% of its preferred stocks. If any of said stockholders is a holding corporation, the names and addresses of all persons owning a beneficial interest in over 10% if the common or preferred stock of said holding company.
N/A
The names and positions of all persons listed hereinabove who are elected or appointed officers
or employees of the City of Stamford.
None
Name of Bidder/Proposer: Michael Fazio, MA Signature of Bidder/Proposer: Title: Member, LLC
Company Name: Municipal Valuation Services, LLC
Address: 23 Sherman Street, Suite 201, Fairfield, CT 06824
Indicate if company submitting this proposal is:MBEBBE



Non-Collusion Affidavit

Non-Collusion Affidavit

The undersigned, having been duly sworn, affirms and says that to the best of his/her knowledge and belief:

- 1. The prices in this Proposal have been arrived at independently without collusion, consultation, communication, or agreement with any other Proposer or with any competitor for the purpose of restricting competition.
- 2. Unless otherwise required by law, the prices, which have been quoted in this Proposal, have not been knowingly disclosed by the Proposer and will not knowingly be disclosed by the Proposer prior to opening, directly or indirectly, to any other Proposer or to any competitor.
- 3. No attempt has been made or will be made by the Proposer to induce any other person, partnership or corporation to submit or not to submit a Proposal for the purpose of restricting competition.

1

Name of Proposer: Municipal Valuation Services, LLC
Print Name: Michael Fazio, MAI
Title:Member, LLC
ACKNOWLEDGMENT
STATE OFConnecticut
COUNTY OF Fairfield ss. Fairfield
Date: $\frac{12/3}{2020}$
Personally appeared Michael Fazio , as Member, LLC
of the above named firm, and attested that the foregoing statements are true and accurate to the
best of his/her knowledge and belief. Signature of Notary Public TAMA CAREATHERS
My Commission Expires: NOTARY PUBLIC MY COMMISSION EXPIRES MAR. 31, 2022

EFFECTIVE: 2/24/09



Compliance Affidavit

<u>City of Stamford</u> State of Connecticut Contractor Verification (in accordance with Public Act 16-67)
Compliance Affidavit I, the undersigned, personally and on behalf of Municipal Valuation Services, LLC (Contractor) been duly sworn, affirm and say that I have read, understand and am in compliance with Public Act 16-67 Concerning the Disclosure of Certain Education Personnel Records, Criminal Penalties for Threatening in Educational Settings and the Exclusion of a Minor's Name from Summary Process Complaints, and that neither I nor said Contractor, to the best or my knowledge, is in possession of any information indicating a finding of abuse or neglect or sexual misconduct, or otherwise have knowledge of such a condition(s) for any employees working on the project identified in RFQ/RFP or Bid S-809. Further, if I or said Contractor (RFQ/RFP or Bid Number) become aware of any information indicating such a finding, or otherwise gain knowledge of such a condition, I and/or said Contractor will immediately forward such information to the City of Stamford.
Contractor Name: Municipal Valuation Services, LLC
Street Address: 23 Sherman Street, Suite 201
City, State, Zip:Fairfield, Connecticut 06824
Title of person completing this form: Member, LLC Signature: Michael Fazio, MAI Date: 1200
ACKNOWLEDGMENT
STATE OF Connecticut
COUNTY OF Fairfield ss. Fairfield Date: 12/3/2020
Personally appeared Michael Fazio , as Member, LLC of the above named Contractor, and attested that the foregoing statements are true and accurate to the best of his/her knowledge and belief on behalf of himself and said Contractor. Signature of Notary Public My Commission Expires: NOTARY PUBLIC MY COMMISSION EXPIRES MAR. 31, 2022



Certification as to Contract Signatory

(Effective 9/1/2011) I, David Herbst, MAI (name of member or manager) a Member or Manager) of Municipal Valuation Services, LLC (name of LLC) LLC, a limited liability company organized and existing under the laws of the State of Connecticut (hereinafter the "Company"), hereby certify that: 1. that Muricipal Valuation Services, LLC is run by Michael Fazio, Christopher Kerin & David Herbst (name of LLC) (Members or Managers) 2. that Michael Fazio, MAI is a Member of Municipal Valuation Services, LLC (name of contact signatory) (Member/Manager) (name of LLC) and 3. that as such Michael Fazio, MAI is not prohibited from or (name of Member/Manager who is contract signatory) limited by the articles of organization from binding the LLC. IN WITNESS HEREOF, the undersigned has affixes his/her signature this 3rd day of , 20 20 December

CERTIFICATION AS TO CONTRACT SIGNATORY For Limited Liability Companies (LLCs)



(LLC Seal)

(Circle this L.S. if there is no seal)

Information & Acknowledgement Form

PROPOSER'S INFORMATION AN	D ACKNOWLEDGEMENT FORM
RFP No: 809	
141110	
Date: 11/23/2020	
Proposer's Name: Municipal Valuation S	Services, LLC
Street Address: 23 Sherman Street, Suite	201
Fairfield	CT 06824
City	State Zip
Business Telephone: (203) 292~5500	
Email: mike@kfvg.com	
DUNS Number: 02~172~1317	Tax Id. No.: 30~0150642
Indicate (Yes/No) if company submitting	this proposal is:
MBE NO	WBE DBE
(If yes, attach relevant/certification) Signature: Printed Name: Michael Fazio, MAI	Date:
Title: Member, LLC	
Addenda Acknowledgement – check and	note date of addendum
M Addenda No. 1 10/23/2020	□ Addenda No. 2
□ Addenda No. 3	□ Addenda No. 4
☐ Addenda No. 5	□ Addenda No. 6
☐ Addenda No. 7	□ Addenda No. 8
☐ Addenda No. 9	□ Addenda No. 10
☐ Addenda No. 11	□ Addenda No. 12



Company W9

	W-9 Includes 2018) ment of the Treasury Revenue Service		· Go to www.ira.	Request for ation Number gov/FormW9 for Inc	er and Certifi tructions and the in	teet informati	on.		Give Form to the requester. Do no send to the IRS.
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Form W-9 (Rev. 10-2016)

Get. No. 10231X

Contract Compliance Monitoring Report

COMMISSION ON HUMAN RIGHTS AND OPPORTUNITIES CONTRACT COMPLIANCE REGULATIONS NOTIFICATION TO BIDDERS

(Revised 09/3/15)

The contract to be awarded is subject to contract compliance requirements mandated by Sections 4a-60 and 4a-60a of the Connecticut General Statutes; and, when the awarding agency is the State, Sections 46a-71(d) and 46a-81i(d) of the Connecticut General Statutes. There are Contract Compliance Regulations codified at Section 46a-68j-21 through 43 of the Regulations of Connecticut State Agencies, which establish a procedure for awarding all contracts covered by Sections 4a-60 and 46a-71(d) of the Connecticut General Statutes.

According to Section 46a-68j-30(9) of the Contract Compliance Regulations, every agency awarding a contract subject to the contract compliance requirements has an obligation to "aggressively solicit the participation of legitimate minority business enterprises as bidders, contractors, subcontractors and suppliers of materials." "Minority business enterprise" is defined in Section 4a-60 of the Connecticut General Statutes as a business wherein fifty-one percent or more of the capital stock, or assets belong to a person or persons: "(1) Who are active in daily affairs of the enterprise; (2) who have the power to direct the management and policies of the enterprise; and (3) who are members of a minority, as such term is defined in subsection (a) of Section 32-9n." "Minority" groups are defined in Section 32-9n of the Connecticut General Statutes as "(1) Black Americans... (2) Hispanic Americans ... (3) persons who have origins in the Iberian Peninsula... (4)Women... (5) Asian Pacific Americans and Pacific Islanders; (6) American Indians..." An individual with a disability is also a minority business enterprise as provided by Section 4a-60g of the Connecticut General Statutes. The above definitions apply to the contract compliance requirements by virtue of Section 46a-68j-21(11) of the Contract Compliance Regulations.

The awarding agency will consider the following factors when reviewing the bidder's qualifications under the contract compliance requirements:

- (a) the bidder's success in implementing an affirmative action plan;
- (b) the bidder's success in developing an apprenticeship program complying with Sections 46a-68-1 to 46a-68-17 of the Administrative Regulations of Connecticut State Agencies, inclusive;
- (c) the bidder's promise to develop and implement a successful affirmative action plan;
- (d) the bidder's submission of employment statistics contained in the "Employment Information Form", indicating that the composition of its workforce is at or near parity when compared to the racial and sexual composition of the workforce in the relevant labor market area; and
- (e) the bidder's promise to set aside a portion of the contract for legitimate minority business enterprises. <u>See Section 46a-68j-30(10)(E)</u> of the Contract Compliance Regulations.

INSTRUCTIONS AND OTHER INFORMATION

The following BIDDER CONTRACT COMPLIANCE MONITORING REPORT must be completed in full, signed, and submitted with the bid for this contract. The contract awarding agency and the Commission on Human Rights and Opportunities will use the information contained thereon to determine the bidders compliance to Sections 4a-60 and 4a-60a CONN. GEN. STAT., and Sections 46a-68j-23 of the Regulations of Connecticut State Agencies regarding equal employment opportunity, and the bidder's good faith efforts to include minority business enterprises as subcontractors and suppliers for the work of the contract.

1) Definition of Small Contractor

Section 4a-60g CONN. GEN. STAT. defines a small contractor as a company that has been doing business under the same management and control and has maintained its principal place of business in Connecticut for a one year period immediately prior to its application for certification under this section, had gross revenues not exceeding fifteen million dollars in the most recently completed fiscal year, and at least fifty-one percent of the ownership of which is held by a person or persons who are active in the daily affairs of the company, and have the power to direct the management and policies of the company, except that a nonprofit corporation shall be construed to be a small contractor if such nonprofit corporation meets the requirements of subparagraphs (A) and (B) of subdivision 4a-60g CONN. GEN. STAT.



Description of Job Categories (as used in Part IV Bidder Employment Information) (Page 2)

MANAGEMENT: Managers plan, organize, direct, and BUILDING AND GROUNDS CLEANING AND control the major functions of an organization through MAINTENANCE: This category includes occupations subordinates who are at the managerial or supervisory level. involving landscaping, housekeeping, and janitorial They make policy decisions and set objectives for the services. Job titles found in this category include company or departments. They are not usually directly supervisors of landscaping or housekeeping, janitors, involved in production or providing services. Examples maids, grounds maintenance workers, and pest control include top executives, public relations managers, managers of operations specialties (such as financial, human resources, or purchasing managers), and construction and engineering managers.

BUSINESS AND FINANCIAL OPERATIONS: These occupations include managers and professionals who work laborers, electricians, plumbers (and related trades), with the financial aspects of the business. These occupations roofers, sheet metal workers, elevator installers, include accountants and auditors, purchasing agents, hazardous materials removal workers, paperhangers, and management analysts, labor relations specialists, and budget, credit, and financial analysts.

MARKETING AND SALES: Occupations related to the act or process of buying and selling products and/or services such as sales engineer, retail sales workers and sales representatives including wholesale.

LEGAL OCCUPATIONS: In-House Counsel who is charged with providing legal advice and services in regards to legal issues that may arise during the course of standard business practices. This category also includes assistive legal occupations such as paralegals, legal assistants.

COMPUTER SPECIALISTS: Professionals responsible for the computer operations within a company are grouped in this category. Examples of job titles in this category include computer programmers, software engineers, database administrators, computer scientists, systems analysts, and computer support specialists

ARCHITECTURE AND ENGINEERING: Occupations related to architecture, surveying, engineering, and drafting are included in this category. Some of the job titles in this category include electrical and electronic engineers, surveyors, architects, drafters, mechanical engineers, materials engineers, mapping technicians, and civil engineers.

OFFICE AND ADMINISTRATIVE SUPPORT: All clerical-type work is included in this category. These jobs involve the preparing, transcribing, and preserving of written miscellaneous material moving workers. communications and records; collecting accounts; gathering PRODUCTION WORKERS: The job titles included in and distributing information; operating office machines and this category are chemical production machine setters, electronic data processing equipment; and distributing mail. Job titles listed in this category include telephone operators, bill and account collectors, customer service representatives, dispatchers, secretaries and administrative assistants, computer operators and clerks (such as payroll, shipping, stock, mail and file).

workers.

CONSTRUCTION AND EXTRACTION: This category includes construction trades and related occupations. Job titles found in this category include boilermakers, masons (all types), carpenters, construction painters. Paving, surfacing, and tamping equipment operators; drywall and ceiling tile installers; and carpet, floor and tile installers and finishers are also included in this category. First line supervisors, foremen, and helpers in these trades are also grouped in this category.

INSTALLATION, MAINTENANCE AND REPAIR: Occupations involving the installation, maintenance, and repair of equipment are included in this group. Examples of job titles found here are heating, ac, and refrigeration mechanics and installers; telecommunication line installers and repairers; heavy vehicle and mobile equipment service technicians and mechanics; small engine mechanics; security and fire alarm systems installers; electric/electronic repair, industrial, utility and transportation equipment; millwrights; riggers; and manufactured building and mobile home installers. First line supervisors, foremen, and helpers for these jobs are also included in the category.

MATERIAL MOVING WORKERS: The job titles included in this group are Crane and tower operators; dredge, excavating, and lading machine operators; hoist and winch operators; industrial truck and tractor operators; cleaners of vehicles and equipment; laborers and freight, stock, and material movers, hand; machine feeders and offbearers; packers and packagers, hand; pumping station operators; refuse and recyclable material collectors; and

operators and tenders; crushing/grinding workers; cutting workers; inspectors, testers sorters, samplers, weighers; precious stone/metal workers; painting workers; cementing/gluing machine operators and tenders; etchers/engravers; molders, shapers and casters except for metal and plastic; and production workers.



3) Definition of Racial and Ethnic Terms (as used in I	Part IV Bidder Employment Information) (Page 3)
White (not of Hispanic Origin)-All persons having origins in any of the original peoples of Europe, North Africa, or the Middle East. Black (not of Hispanic Origin)-All persons having origins in any of the Black racial groups of Africa. Hispanic- All persons of Mexican, Puerto Rican, Cuban, Central or South American, or other Spanish culture or origin, regardless of race.	
BIDDER CONTRACT COMPL PART 1 – Bidder Information	JANCE MONITORING REPORT
Company Name: Municipal Valuation Services, LLC	Bidder Federal Employer 30-0150642
Street Address: 23 Sherman Street, Suite 201	Identification Number:
City & State: Fairfield, Connecticut	Or
Chief Executive: Michael Fazio, MAI	Social Security Number:
Major Business Activity: Real Estate Revaluation Services (brief description)	Bidder Identification (response optional/definitions on page 1)
	-Bidder is a small contractor? Yes ✓No ☐ -Bidder is a minority business enterprise? Yes ☐No ✓
	(If yes, check ownership category) Black Hispanic Asian American
	American Indian/Alaskan Native Iberian Peninsula Individual(s) with a Physical Disability Female
	-Bidder is certified as above by State of CT? Yes VNo
Bidder Parent Company: NA	
(If any)	
Other Locations in CT: NA	1
(If any)	
PART II - Bidder Nondiscrimination Policies and Procedures 1. Does your company have a written Affirmative	7. Do all of your company contracts and purchase orders contain
Action/Equal Employment Opportunity statement posted on	non-discrimination statements as required by Sections 4a-60 &
company bulletin boards?	4a-60a Conn. Gen. Stat.?
Yes 🗸 No 📗	Yes No
2. Does your company have the state-mandated sexual	8. Do you, upon request, provide reasonable accommodation
harassment prevention in the workplace policy posted on	to employees, or applicants for employment, who have
company bulletin boards? Yes No	physical or mental disability? Yes No
3. Do you notify all recruitment sources in writing of your	9. Does your company have a mandatory retirement age for all
company's Affirmative Action/Equal Employment Opportunity	employees?
employment policy? Yes 🗸 No	Yes No 🗸
4. Do your company advertisements contain a written statement	10. If your company has 50 or more employees, have you provided at
that you are an Affirmative Action/Equal Opportunity Employer? Yes No	least two (2) hours of sexual harassment training to all of your supervisors? Yes No N/A
5. Do you notify the Ct. State Employment Service of all	11. If your company has apprenticeship programs, do they meet the
employment openings with your company?	Affirmative Action/Equal Employment Opportunity requirements of
Yes No	the apprenticeship standards of the Ct. Dept. of Labor?
6. Does your company have a collective bargaining	Yes No N/A
agreement with workers?	12. Does your company have a written affirmative action Plan? Yes ☑ No ☐
Yes No V	If no, please explain.
6a. If yes, do the collective bargaining agreements contain non-discrimination clauses covering all workers? Yes No ☐	acros, pecase or promi
6b. Have you notified each union in writing of your	13. Is there a person in your company who is responsible for equal
commitments under the nondiscrimination requirements	employment opportunity? Yes No
of contracts with the state of CT?	If yes, give name and phone number:
Ves No NA	Tama Careathers, (203) 292-5500 x303



art III - Bidder Subcontracting Practices 1. Will the work of this contract include subcontractors or suppliers? Yes No	(Page 4)
1a. If yes, please list all subcontractors and suppliers and report if they are a small contractor and/or a enterprise. (defined on page 1 / use additional sheet if necessary)	minority business
1b. Will the work of this contract require additional subcontractors or suppliers other than those identifi-	edin la above? Yes∏No

PART IV - Bidder l	Employment	ion	Date: 11/25/2020								
OB CATEGORY *	OVERALL TOTALS	WHITE (see of Hispanic origin)		BLACK (not of Hispanic crigin)		HISPANIC		ASIAN or PACIFIC ISLANDER		AMBRICAN INDIAN of ALASKAN NATIVE	
		Mala	Famala	Male	Famala	Male	Female	Male	Female	Male	Female
Манадашеня		3									
Business & Financial Ops											
Marketing & Sales											
Legal Occupations											
Computer Specialists											
Architecture/Engineering											
Office & Admin Suppose		5	4				1				
Bidg/ Grounds Clasning/Maintenance											
Construction & Extraction											
hsvallavion . Mainvenance & Repair											
Material Moving Workers											
Production Occupations											
TOTALS ABOVE		8	4				1				
Total One Year Ago											
	FORM	(ALON THE I	OBTRANTES (ENTER FKJU	RES FOR THE SA	ME CATEGO	RESASAI	A WWOHE ES	BOVE)	33	7
Approxices	1										
Trainees											

"NOTE: JOB CATEGORIES CAN BE CHANGED OR ADDED TO (EX. SALES CAN BE ADDED OR REPLACE A CATEGORY NOT USED IN YOUR COMPANY)



Which of the following recruitment sources are used by you? (Check, yes or no. and report percent used)				tequiremen) azy of the below listed uts that you use as ualification	(Page 5) 3. Describe below any other practices or actions that you take which show that you bite, train, and promote employees without discrimination. We conduct our recruitment though public & private employee referral sources likely to yield qualified minority and female applicants. We also encourage our present employees to refer			
SOURCE	YE5	NO	% of applicants provided by source			minority group applicants for employment. All procedures 8 information with regard to referring minority group applicant discussed with all employees.			
Sate Employment Service				х	Work Experience				
Private Employment Agencies	Ø				Ability to Speak or Write English				
Schook and Colleges	V	П			Written Tests				
Newspaper Advertisement	v			Х	High School Diploma				
Walk Ins	Ø			х	College Degree				
Present Employees	V	П			Union Membership				
Labor Organizations	Image: section of the content of the				Personal Recommendation				
Minority/Community Organizations	Ø				Height or Weight				
Others (please identify)	1			х	Car Ownership				
		2,		х	Arrest Record				
					Wage Garnishments				
$-\sqrt{\sqrt{\epsilon}}$	$\overline{}$	\supset		(Tixle) Memb			(Telephone) (203) 292-5500 x301		

Bid Bond



Bld Bond

CONTRACTOR:

(Name, legal status and address)
Municipal Valuation Services, LLC 23 Sherman Street, Suite 201 Fairfield, CT 06824

OWNER:

PROJECT:

(Name, legal status and address)
City of Stamford 888 Washington Boulevard Stamford, CT 06901 BOND AMOUNT:

Five Percent of Amount Bid (5%)

(Name, location or address, and Project number, if any)

Reappraisal and Revaluation of all Real Estate in the City of Stamford; RFP No. 809

BURETY:

(Name, legal status and principal place of business) United States Fire Insurance Company 305 Madison Avenue Morristown, NJ 07960

This document has important legal equences. Consultatio an attorney is encouraged with respect to its completion or modification,

Any singular reference to Contractor, Surety, Owner or other party shall be considered plural where applicable.

The Contractor and Surety are bound to the Owner in the amount set forth above, for the payment of which the Contractor and Surety bind themselves, their heirs, executors, administrators, successors and assigns, jointly and severally, as provided herein. The conditions of this Bond are such that if the Owner accepts the bid of the Contractor within the time specified in the bid documents, or within such time period as may be agreed to by the Owner and Contractor, and the Contractor either (1) enters into a contract with the Owner in accordance with the terms of such bid, and gives such bond or bonds as may be specified in the bidding or Contract Documents, with a surety admitted in the jurisdiction of the Project and otherwise acceptable to the Owner, for the faithful performance of such Contract and for the prompt payment of labor and material furnished in the prosecution thereof; or (2) pays to the Owner the difference, not to exceed the amount of this Bond, between the amount specified in said bid and such larger amount for which the Owner may in good faith contract with another party to perform the work covered by said bid, then this obligation shall be null and void, otherwise to remain in full force and effect. The Surety hereby waives any notice of an agreement between the Owner and Contractor to extend the time in which the Owner may accept the bid. Waiver of notice by the Surety shall not apply to any extension exceeding sixty (60) days in the aggregate beyond the time for acceptance of bilds specified in the bid documents, and the Owner and Contractor shall obtain the Surety's consent for an extension beyond sixty (60) days.

If this Bond is issued in connection with a subcontractor's bid to a Contractor, the term Contractor in this Bond shall be deemed to be Subcontractor and the term Owner shall be deemed to be Contractor.

When this Bond has been furnished to comply with a statutory or other legal requirement in the location of the Project, any provision in this Bond conflicting with said statutory or legal requirement shall be deemed deleted herefrom and provisions conforming to such statutory or other legal requirement shall be deemed incorporated herein. When so furnished, the intent is that this Bond shall be construed as a statutory bond and not as a common law bond.

day of December, 2020 Municipal Val (Seal) United State (Seal) (Surety) (Title) Christopher J. Como, Attorney-in-Fact

CAUTION: You should sign an original AJA Contract Document, on which this text appears in RED. An original essures that changes will not be obscured.

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Intt.

POWER OF ATTORNEY UNITED STATES FIRE INSURANCE COMPANY PRINCIPAL OFFICE - MORRISTOWN, NEW JERSEY

00627406620

KNOW ALL MEN BY THESE PRESENTS: That United States Fire Insurance Company, a corporation duly organized and existing under the laws of the state of Delaware, has made, constituted and appointed, and does hereby make, constitute and appoint:

Christopher J. Como, Jane Quinn

each, its true and lawful Attorney(s)-In-Fact, with full power and authority hereby conferred in its name, place and stead, to execute, acknowledge and deliver: Any and all bonds and undertakings of surety and other documents that the ordinary course of surety business may require, and to bind United States Fire Insurance Company thereby as fully and to the same extent as if such bonds or undertakings had been duly executed and acknowledged by the regularly elected officers of United States Fire Insurance Company at its principal office, in amounts or penalties not exceeding: Seven Million, Five Hundred Thousand Dollars (\$7,500,000).

This Power of Attorney limits the act of those named therein to the bonds and undertakings specifically named therein, and they have no authority to bind United States Fire Insurance Company except in the manner and to the extent therein stated.

This Power of Attorney revokes all previous Powers of Attorney issued on behalf of the Attorneys-in-Past named above and expires on January 31, 2021.

This Power of Attorney is granted pursuant to Article IV of the By-Laws of United States Fire Insurance Company as now in full force and effect, and consistent with Article III thereof, which Articles provide, in pertinent part:

Article IV, Execution of Instruments - Except as the Board of Directors may authorize by resolution, the Chairman of the Board, President, any Vice-President, any Assistant Vice President, the Secretary, or any Assistant Secretary shall have power on behalf of the Corporation:

- (a) to execute, affix the corporate seal manually or by fuesimile to, acknowledge, verify and deliver any contracts, obligations, instruments and documents whatsoever in connection with its business including, without limiting the foregoing, any bonds, guarantees, undertakings, recognizances, powers of attorney or revocations of any powers of attorney, stipulations, policies of insurance, deeds, leases, mortgages, releases, satisfactions and agency agreements;
- (b) to appoint, in writing, one or more persons for any or all of the purposes mentioned in the preceding paragraph (a), including affixing the seal of the Corporation.

Article III, Officers, Section 3.11, Facsimile Signatures. The signature of any officer authorized by the Corporation to sign any bonds, guarantees, undertakings, recognizances, stipulations, powers of attorney or revocations of any powers of attorney and policies of insurance issued by the Corporation may be printed, facsimile lithographed or otherwise produced. In addition, if and as authorized by the Board of Directors, dividead warrants or checks, or other numerous instruments similar to one another in form, may be signed by the facsimile signature or signatures, lithographed or otherwise produced, of such officer or officers of the Corporation as from time to time may be authorized to sign such instruments on behalf of the Corporation. The Corporation may continue to use for the purposes herein stated the facsimile signature of any person or persons who shall have been such officer or officers of the Corporation notwithstanding the fact that he may have ceased to be such at the time when such instruments shall be issued.

IN WITNESS WHEREOF, United States Fire Insurance Company has caused these presents to be signed and attested by its appropriate officer and its corporate seal hereunto affixed this 22²⁴ day of August 2019.

UNITED STATES FIRE INSURANCE COMPANY



A. P.X

Anthony R. Slimowicz, Executive Vice President

State of Pennsylvania) County of Philadelphia)

On this 22rd day of August 2019, before me, a Notary public of the State of Pennsylvania, came the above named officer of United States Fire Insurance Company, to me personally known to be the individual and officer described herein, and acknowledged that he executed the foregoing instrument and affixed the seal of United States Fire Insurance Company thereto by the authority of his office.

Commonwealth of Pennsylvania – Notary Scal Tamara Watkins, Notary Public Philadelphia County My commission expires August 22, 2023 Commission number 1348843 Jamara Katking

Tamara Watkins

(Notary Public)

 the undersigned officer of United States Fire Insurance Company, a Delaware corporation, do hereby certify that the original Power of Attorney of which the foregoing is a full, true and correct copy is still in force and effect and has not been revoked.

IN WITNESS WHEREOF, I have hereunto set my hand and affixed the corporate seal of United States Fire Insurance Company on the 3 rd ay of MCDABCQ020

UNITED STATES FIRE INSURANCE COMPANY



Al Wright, Senior Vice President





Como & Nicholson, Inc.

501 MAIN STREET, SUITE 2D, MONROE, CT 06468

November24, 2020

City of Stamford 888 Washington Blvd, Stamford, CT 06901

RE: Municipal Valuation Services, LLC Bid Bond dated December 3, 2020 Reappraisal and Revaluation of all Real Estate RFP No. 809

To Whom It May Concern:

This letter is to acknowledge the copy of the bid bond being uploaded electronically is effective as an original signed, sealed bid bond.

If there is anything else required, please let us know.

Sincerely,

United States Fire Insurance Company,

Christopher J. Como Attorney-In-Fact

MONROE (203) 445-8388 • OR TOLL FREE 1-(866)-805-2663 • FAX (203) 445-8334

