

**ADDENDUM NO. 2**  
TO  
CITY OF AUBURN, MAINE  
Revaluation Services Bid #2024-035  
DATE: May 20, 2024

*This addendum amends and /or supplements the bid documents as indicated below. Only these items alter the bid documents. Any verbal discussions or responses are hereby declared null and void. Please acknowledge this addendum on the Bid Proposal Form.*

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**Submission Clarification:** Please provide an electronic copy of your proposal on a USB Drive inside the sealed envelope with your hard copy. Please do not email your proposal.

**Q: When reviewing Addenda D - 2023 Assessor's Report, we wanted to better understand how the effective ratio is calculated. Can you please outline or point us to where we can find this information?**

A: As a result of the revaluation, we expect the certified ratio to be at or near 100%. A ratio is a relationship between an arms-length sales price and the assessed value. When they are equal, the ratio can be considered 100% (or 1). We analyze sales in a sales ratio study to develop and support the declared certified ratio. Copies of prior ratio studies can be made available upon request.

**Q: To confirm, the targeted implementation year is 2027?**

A: The timeline was left open to accommodate bidders based on their availability. The desired start date is "as soon as possible". Similarly, we hope that bidders propose an implementation date that is timely but affords enough time to complete the project with due diligence. 2027 is an acceptable implementation date.

**Q: With regard to sales, how many years worth of sales are considered recent sales? 12 months? 18 months? A different period?**

A: Generally, it depends on the property type and the quantity of sales that are available. Based on current market trends, we believe 2 years is the optimal time range to consider for residential property types. However, the bidder should determine their own scope of work that considers best appraisal practices. The assessing department maintains a list of sales available for analysis.

Unusual or special use properties may have less frequent sales and the time parameters can be expanded.

**Q: Does Auburn subscribe to CoStar and will it be available to use?**

A: We do not subscribe to CoStar.

**Q: Is there a standard file that gets submitted to the state when the new cycle is completed? Can we please see the most recent submission?**

A: It is unclear what is being requested in this question. There is not a standard file.

**Q: In Addendum No. 1, it was written that a copy of the last revaluation is available to review; will it be posted for download? If not, how may we see it?**

A: It is not available in a single document or in an exportable electronic format. It is contained in several printed volumes and other loose notes in a file cabinet in the Assessing Office. Documents are available for review in the office. Compared to the last revaluation current technology and appraisal methods have changed. The information is very dated, and it is not recommended to serve as a guide for any upcoming revaluation.

**Q: Under the "Conditions and Instructions to Bidders" section, point 1 states that "Bidders shall use the enclosed bid form and schedule of values forms", but we only see the bid form. Is there an additional form we're supposed to use?**

A: Schedule of values form was listed in error. Please follow the "Proposal Format" listed on page 16.

**Q: What is the desired timing of the project? What is the expected duration of the project? We would like to know these two things so that our timeline makes sense.**

A: The timeline was left open to accommodate bidders based on their availability. The desired start date is "as soon as possible". We expect the project to last up to two years once it begins. Other scenarios are possible and should be clearly stated in the proposal.

**Q: With regard to sales, how many years worth of sales are considered recent sales?**

A: Based on current market trends, we believe 2 years is the optimal time range to consider. However, the respondent should determine their own scope of work that takes into account best appraisal practices. The assessing department maintains a list of sales available for analysis. Unusual or special use properties may have less frequent sales and the time parameters can be expanded. No matter what sales are used, the expectation is that the City can support a 100% certified ratio once the new values are implemented.

**Q: With regard to sales, how many sales transactions occur within a given year on average?**

A: We have a range of 600 to 800 sales and other transactions per year. Of those around 500 are generally deemed to be "arm's length" transactions.

**Q: With regard to income for income based valuations, can you please outline in more detail:**

- A. How income data is collected and what are the key sources?**
- B. How many properties does the data collected generally cover? 10%, 25%, 50%, etc?**
- C. Is the data collected representative of the number of income valued properties overall? Said another way, is the income data received or procured by the city representative of the property mixture that is valued on an income basis?**

A: The full scope of needed income data is not known. We recently conducted an income and expense data collection effort of multi-family properties. The form was a mass mailing of I & E surveys. We have yet to fully stratify or analyze the data, nor have we tabulated the response rate. As a part of this project similar studies on commercial properties are recommended when deemed needed.

**Q: What personal property appraisal methods does the City currently use?**

A: We use an untrended original cost method. Original costs are depreciated based on tables according to asset type. Filers report their asset lists to us pursuant to Maine law, we then process those accounts each year. We have a personal property database in AP5 (Patriot AssessPro) which was customized for our municipality. Personal Property files are maintained in our office. We have around 1,100 accounts.

**Q: We do not expect to suggest that a new CAMA system be used. We have experience with the Patriot system but would like to know the extent to which additional training on the system would be provided? Is the version of Patriot used by the City hosted by the City or cloud-based and hosted by Patriot?**

A: We use cloud-based hosting. The transition to the cloud occurred recently and is working well. If Patriot is maintained as the CAMA, we will not likely need much additional training, except if significant edits to tables or functions are made. For example, if an income module was activated.

**Q: Can you please provide/post an example of the last valuation notice sent by the City?**

A: The last time mass valuation notices were sent was more than 20 years ago. We would work with any vendor to design a new notice and are open to any recommendations.

**Q: What is the financial software the City uses?**

A: The tax collector uses MUNIS for billing and tax collection.

**Q: "Maine Revenue Services Rule , Chapter 128: Guidelines for Professional Assessing Firms that Provide Revaluation Services to Municipalities" is cited. Can you please provide a link? We could not find Chapter 128, just rule 208 with a similar title.**

A: The link is to Maine Revenue Services [Microsoft Word - rule 208 2022 clean.docx \(maine.gov\)](#)

**Q: With regard to property inspections, how long after an area of the City has been inspected is the window for alternate inspections expected to be open?**

A: Two weeks is a general recommendation, but as long as necessary to ensure the property owner has due notice to cooperate. We encourage bidders to include in their proposal their recommendations for administering inspections.

**Q: If a property is not inspected on the first attempt, what does the City mean by additional attempts? A callback notice, another site visit, something else? Please clarify.**

A: Any outreach to the property owner can be considered an additional attempt. Examples include letters, door tags, or additional site visits. Other recommendations will be entertained in this proposal.

**Q: For building permits, will we have access to the permitting system to review plans when applicable for a property?**

A: We can provide a list of permits and reports from our system. When needed, plans and specifications are likely to be available for review. Generally, the assessing staff expects to participate in permit inspections.

**Q: On page 3, under Bonds, Retainage, and Payments, does the performance bond apply? The clause seems like one typically used in a construction contract. If it does not apply, will it be struck from the final contract?**

A: Payment and Performance Bonds are not required for this project at this time.