



# Town of Bristol Town-Wide Reappraisal

September 19, 2024

Gio Giordano  
One Tyler Way, Moraine, OH 45439  
Phone: 585.738.1040  
Email: [Gio.Giordano@tylertech.com](mailto:Gio.Giordano@tylertech.com)



## Trademarks Disclaimer

Because of the nature of this response, third-party hardware and software products may be mentioned by name. These names may be trademarked by the companies that manufacture the products. It is not Tyler's intent to claim these names or trademarks as our own.

## Restrictions on Disclosure

This proposal from Tyler Technologies, Inc. ("Tyler") contains proprietary and confidential information, including trade secrets, belonging to Tyler or Tyler's partners. Tyler is submitting this proposal on the express condition that the following portions will not be duplicated, disclosed, or otherwise made available, except for internal evaluation purposes:

- Response to the Functional Requirements, or "Checklist"
- Line-item pricing (total proposed contract amount may be disclosed)
- Screen shots if any
- Detailed information regarding current customers
- Detailed employee resumes/CVs
- Customized Statement of Work/Implementation Plan

To the extent disclosure of those portions is requested or ordered, Tyler requires written notice of the request or order. If disclosure is subject to Tyler's permission, Tyler will grant that permission in writing, in Tyler's sole discretion. If disclosure is subject to a court or other legal order, Tyler will take whatever action Tyler deems necessary to protect its proprietary and confidential information and will assume all responsibility and liability associated with that action.

Tyler agrees that any portions not listed above and marked accordingly are to be made available for public disclosure, as required under applicable public records laws and procurement processes.



September 19, 2024

One Tyler Way  
Moraine, Ohio 45439

P: 800.800.2581  
F: 937.278.3711

[www.tylertech.com](http://www.tylertech.com)

Bristol Listers  
Town of Bristol  
PO Box 249, 1 South Street  
Bristol, Vermont 05443

Re: Request for Proposals for Town-Wide Reappraisal

Dear Bristol Listers:

Tyler Technologies, Inc., (Tyler) is pleased to respond to the Town of Bristol's RFP for the above referenced services. The attached proposal details our recommended approach to complete this important project. Tyler Technologies, Inc., Appraisal Services will provide the reappraisal services in accordance with our proposal, the specifications set forth by the Town, and the guidelines determined by the State of Vermont, as they currently exist.

Our very experienced appraisal staff, led by John Valente and John Vickery, has extensive experience on MicroSolve CAMA software systems throughout Vermont and New England. John Valente, Northeast Regional Manager, will assist in the development of the market valuation tables and review of all properties over \$5,000,000. Mr. Valente has 40+ years of experience in the field of municipal appraisal and with market analysis, developing valuation models, and litigation as an expert witness to value.

John Vickery, Senior Appraisal Project Supervisor, has a Vermont Master Property Assessor (level IV) certification with the Vermont Tax Department. Mr. Vickery was the Burlington Assessor for 22 years and has been in the appraisal profession for 29 years. Both John Valente and John Vickery are Vermont State Approved Appraisers.

Tyler's locally based appraisal staff is second to none in providing many successful, quality reappraisals throughout the State of Vermont. Tyler will meet or exceed IAAO standards and will deliver detailed analytical documentation, as it relates specifically to the Town of Bristol, assuring the Town that the proposed valuations will be well supported and that the taxpayer dollars are well spent. We will collaborate closely with the Assessor's office throughout all phases of the process thereby ensuring a smooth transition and on time completion of the project.

Gio Giordano will be Tyler's primary contact for this procurement; he can be reached by phone at 585.738.1040 or by email at [gio.giordano@tylertech.com](mailto:gio.giordano@tylertech.com). This proposal is effective for 60 days from submission.

Thank you for considering Tyler. We look forward to discussing the significant advantages our experienced appraisal team has to offer the Town of Bristol.

Sincerely,

A handwritten signature in blue ink that reads "Gus Tenhundfeld".

Gus Tenhundfeld  
Inside Sales Manager

# Table of Contents

Executive Summary ..... 1

    Company Advantages and Strengths..... 1

    Tyler Corporate Officers ..... 2

    Tyler & Safeground..... 3

    Tyler Contacts..... 3

Company Background ..... 4

Project Cost ..... 5

Project Personnel ..... 6

Tyler Scope of Reappraisal ..... 11

    Town Data ..... 11

    Parcel Count ..... 11

    Town Scope of Service Requirements ..... 12

    Description of Project..... 13

    Tyler Appraisal Process & Methodologies ..... 14

    Project Planning & Record Preparation ..... 15

    Data Collection Phase..... 17

    Analytical Phase..... 23

    Final Value Review Phase ..... 32

    Defense of Values..... 34

    Mass Appraisal Report..... 36

Public Relations Program..... 37

Project Schedule..... 39

Tyler Experience & References..... 40

    History of CAMA ..... 40

    Tyler Competency Using MicroSolve CAMA and GIS Data during the Reappraisal..... 40

    Current Vermont Reappraisal Contracts ..... 41

    Recommendation Letters ..... 41

    Tyler Northeastern Appraisal Services Client List ..... 42

    Tyler Five Year Client List..... 45

Clarifications & Understandings ..... 62

Appendix: Financial Stability & 2030 Vision..... 63

## Executive Summary

The Town of Bristol has many factors to consider when making the major decision regarding the qualified company you will partner with on your Town-Wide Reappraisal. The chosen partner's mass appraisal qualifications, the quality of the appraisal personnel to staff the project, and a sound approach to completing the project on time should be primary considerations. In the current economic environment, it is equally important to assess the financial stability of the partner and the likelihood they will see the project through to completion and be available to assist the Town of Bristol in the future on an as needed basis.

The past performance of Tyler Technologies' Appraisal Services is a powerful indicator of our strengths. Our exclusive focus on the public sector has allowed Tyler to establish an operating model that has positioned our organization as the clear leader in this space. Because Tyler Technologies is a publicly held company (NYSE: TYL), our prospective clients can leverage regulations as set forth by the SEC to further evaluate our current financial position. We believe it is important for the Town of Bristol to have assurances that the work will occur uninterrupted.

## Company Advantages and Strengths

**Leadership:** Tyler's Appraisal Services is the nation's only national mass appraisal company and has been appraising properties since 1938. We have specific, local experience in the northeast and a large staff of qualified individuals available for assignment, led by Jake Wilson, VP & GM of Appraisal Services and Derek Arnold, Vice President of Appraisal Operations. Tyler has led the development of computer-assisted mass appraisal (CAMA) and has been innovating approaches since the 1960s.

**Investment:** Tyler follows responsible bidding practices. We respond to your requests, analyze the specifications of your project, and take into consideration the services you need to succeed and avoid unexpected expenses. You can be assured that we will deliver a product and values that you can stand behind when talking with property owners and community leadership.

**Partnership:** Tyler is here for the long term – a strong, lasting partner. Our company is financially sound. We encourage you to compare the financial backgrounds of our competitors and ourselves. You will find that we are well managed with solid principles, and we have the resources to deliver what we promise. We have broad experience in communicating with the public and will help you explain the appraisal process.

**Professionalism:** We work hard for our clients and hold ourselves to high standards of quality and professionalism. We understand how to appraise and defend the values of complex and unusual properties. Our results are measured against the International Association of Assessing Officers (IAAO) and local standards. The results are documented in reports that are compliant with all state and local requirements, as well as Uniform Standards of Professional Appraisal Practice (USPAP) requirements where appropriate.

## Tyler Corporate Officers

**H. Lynn Moore Jr.**

President & Chief Executive Officer

**Brian K. Miller**

Executive Vice President,  
Chief Financial Officer and Treasurer

**Samantha B. Crosby**

Chief Marketing Officer

**Abigail Diaz**

Chief Legal Officer & Secretary

**Jason P. Durham**

Corporate Controller

**Russell Gainford**

Senior Vice President, Cloud Strategy &  
Operations

**Bruce E. Graham**

Senior Strategy Advisor

**Jeffrey S. Green**

Chief Technology Officer

**Kevin W. Iwersen**

Chief Information Officer

**Jeffrey D. Puckett**

Chief Strategy Officer

**Kelley B. Shimansky**

Chief Human Resources Officer

**Jeremy Ward**

Chief Information Security Officer

**Division Leadership**

**Mark Hawkins**

President, Property & Recording Division  
One Tyler Way  
Moraine, Ohio 45439

**Corporate Headquarters**

5101 Tennyson Parkway  
Plano, Texas 75024  
972.713.3700  
[www.tylertech.com](http://www.tylertech.com)

## Tyler & Safeground

Tyler's acquisition of Safeground Analytics combines the expertise and resources to deliver exemplary real estate appraisals and assessments for states, counties, and municipalities. Safeground brings an experienced team of appraisers, analysts, statisticians, economists, computer scientists, and assessors to provide residential and commercial reassessments, bolstering Tyler's existing appraisal services business.

Since 2015, Tyler has worked with Safeground on multifaceted valuation projects in New England. Safeground has a strong presence in the New England and mid-Atlantic markets, which complements Tyler's nationwide appraisal footprint.

In addition to appraisal services, Safeground brings expertise in litigation support and expert witness testimony for property appraisal matters, as well as auditing and monitoring services, expanding Tyler's appraisal services offerings. Safeground is experienced in providing professional educational opportunities, training, and informational resources to further strengthen and grow Tyler's professional services offerings to the assessment community.

"Joining a company with such a broad – and growing – footprint means exciting opportunities to expand our appraisal services and benefit assessors nationwide," said John Valente, formerly chief executive officer of Safeground, currently Tyler's Regional Manager. "Tyler and Safeground share similar values, expertise, and a commitment to International Association of Assessing Officers (IAAO) technical standards for fair and equitable property assessments. We are excited to integrate our expertise and make an impact on nationwide appraisal services."

## Tyler Contacts

We welcome your questions and comments. Please do not hesitate to contact us for information before, during, or after your reappraisal project.

**John Valente**  
Regional Manager  
413.387.3428  
E-mail: [john.valente@tylertech.com](mailto:john.valente@tylertech.com)

**Gio Giordano**  
Regional Sales Lead  
585.738.1040  
E-mail: [gio.giordano@tylertech.com](mailto:gio.giordano@tylertech.com)

**John Vickery**  
Appraisal Senior Project Supervisor  
802.881.9230  
Email: [john.vickery@tylertech.com](mailto:john.vickery@tylertech.com)

**Tyler Technologies, Inc., Appraisal Services**  
One Tyler Way  
Moraine, OH 45439  
800.800.2581  
[www.tylertech.com](http://www.tylertech.com)



## Company Background

In 1938, the Cole Layer Trumble Company began serving the appraisal market. During its long history, Cole Layer Trumble established itself as a leader in appraisal services. In 1999, Tyler Technologies, Inc. (Tyler) acquired Cole Layer Trumble. The combined strengths of these two great companies formed Tyler's Appraisal Services, headquartered in Moraine, Ohio. Our success is due to providing products that work. We have continually refined our appraisal techniques. We pioneered the application of computer-assisted mass appraisal (CAMA). Our sound appraisal practices and knowledge of developing computer systems has enabled us to become a leading provider of appraisal and tax software and services.

Tyler's Appraisal Services is known for our dependability in completing projects on time and within budget. We are recognized for our expertise in areas such as property valuation modeling and analysis. Our team of professionals understands the challenges clients face when communicating with leadership, other agencies, and the public. Tyler stands out from our competitors because we are able to collaborate with clients to develop successful communication strategies. Our appraisal and tax subject matter experts stay up to date on changing legislation and practices through training and professional associations. Our staff of over 300 professionals includes certified appraisers who are thoroughly familiar with the regions in which we work.

Tyler Technologies (NYSE: TYL) provides integrated software and technology services to the public sector. Tyler's end-to-end solutions empower local, state, and federal government entities to operate efficiently and transparently with residents and each other. By connecting data and processes across disparate systems, Tyler's solutions transform how clients turn actionable insights into opportunities and solutions for their communities. Tyler has more than 40,000 successful installations across nearly 13,000 locations, with clients in all 50 states, Canada, the Caribbean, Australia, and other international locations. Tyler has been recognized numerous times for growth and innovation, including *Government Technology's* GovTech 100 list and Forbes' "Most Innovative Growth Companies" list. More information about Tyler Technologies, an S&P 500 company headquartered in Plano, Texas, can be found at [www.tylertech.com](http://www.tylertech.com).



## Project Cost

Tyler will provide the services described in this proposal and the complete specifications as described in the Town of Bristol’s RFP for the fee below:

Begin Date	Completion Date	Project Cost
3/15/ 2026	8/1/2027	<b>Two Hundred Two Thousand Two Hundred Dollars (\$202,200)</b>

Pricing shall reflect the following:

- Tyler shall provide a performance bond, if requested.
- Tyler defines a person-day as eight (8) hours.
- Tyler shall attempt to visit each house visited; a door hanger shall be provided requesting the owner to contact Tyler for inspection.
- Tyler shall schedule inspections, perform interior & exterior inspections of all properties, update sketches and photos.
- Bid includes Hearings, Grievance level appeals at the Board of Lister/Assessor.
- Bid includes a final computer-generated property record card and CAMA cost sheet for each parcel file, and for each dwelling/residence on that parcel.
- Any parcels in excess of 1,737 parcels shall be invoiced at the agreed upon rate of fifty dollars (\$50) for exterior inspections and seventy dollars (\$70) for interior inspections.
- Board of Civil Authority, State Board and Superior Court at \$2,000/day.
- 15% payment is due upon contract signing

Note: Should the community wish to reduce any added benefit services, Tyler Technologies would be pleased to discuss an alternative fee.

## Project Personnel

Tyler actively seeks the best talent to develop, implement, and support our solutions for our clients in Vermont and throughout the Northeast. With more than 300 employees in our Appraisal Services division alone, our staff consists of seasoned professionals who are focused and dedicated with years of industry experience. Our product expertise is strengthened by the fact that many of our employees have years of experience working at public sector agencies prior to joining Tyler.

The Town's project shall be led by John Valente, Northeast Regional Manager, and John Vickery, Appraisal Senior Project Supervisor. Both John Valente and John Vickery are Vermont State Approved Appraisers.

Tyler's staff is highly experienced and certified to understand and meet or exceed all applicable state, International Association of Assessing Officers (IAAO), and Uniform Standards of Professional Appraisal Practice (USPAP) standards to comply with local assessment practices and state statutory requirements.

Our proposed team brings nearly 110 years' combined experience to the Town's project. This diverse experience allows us to respond to the ever-changing dynamics of assessment practices and provide top-notch, one-of-a-kind services to meet your every assessment need. Together our staff provides a blend of strength, experience, vision, and innovation to focus on the Town of Bristol's success now and in the future.

The following pages contain the detailed resumes of our proposed team.

**John Valente, Northeast Regional Manager**

**Summary** With over 40 years' experience in appraisals and consulting, John recently joined Tyler through the acquisition of Safeground Analytics in 2023. John is a Specialist in Real Estate Appraisal, Reassessment Projects, Reassessment Monitoring, Appraisal Litigation, Predictive Analytics, Appraisal Software Development, Digital Imagery, GIS Implementation, Commercial Property Management, Commercial Lease Negotiations and Appraisal Education

**Education** Institute of Real Estate Appraisers – Advanced MAI Candidate  
International Association of Assessing Officers IAAO- CAE Candidate  
Yale University – Graduate Studies Teaching Fellowship, New Haven Connecticut  
Clark University, Worcester MA Dual Major, Cum Laude,

**Work Experience**

- Real Estate Development, Reassessment Monitoring, Appraisal/Assessment, Appraisal Education Real Estate Market Feasibility Analysis
- Complex commercial valuation
- Owner mass appraisal company in Connecticut serving 52 clients
- Narrative Appraisal writing for banks, estates, and individuals
- Survey Research analyst and statistical modeler
- Predictive analytics: municipal bond ratings, housing markets, mortgage trends
- Zoning impact studies on municipal valuation and taxation
- Integration of GIS, CAMA, and oblique imagery in valuation
- GIS and Digital Imagery national conference presenter
- CAMA Software Design, Development, Marketing and Support
- Mass Appraisal Modeling and Management of Revaluation Projects in New York, Connecticut, Massachusetts, Rhode Island, Maine, Vermont, New Jersey

**Skills and Certifications** New York Appraisal Systems Analyst designation – Suffolk County  
OPM Reappraisal Supervisor & Commercial Appraiser -Certification #221 State of CT  
New York Certified Assessor  
PVR Reassessment Project Supervisor – State of Vermont

**Project Experience**

- New York Municipalities - Southampton, Rye, Greenport, Gallatin, Bronxville, Scarsdale
- Vermont Municipalities - Burlington, S. Burlington, Manchester, Salem, Rutland
- Massachusetts Municipalities - Northampton, Wayland, Everett, Berlin, Wellesley, Springfield, Peabody
- Maine Municipalities - Bath, Woolwich, Portland, Readfield
- New Jersey Municipalities - Ocean City, Pilesgrove
- Pennsylvania Municipalities - Allegheny County, Monroe County, Pittsburgh
- Delaware Municipalities - Dover and Milford
- Rhode Island Municipalities - Providence, Pawtucket, Warwick, Woonsocket, Narragansett
- Connecticut Municipalities - Ashford, Bolton, Clinton, East Windsor, Fairfield, Griswold, Groton, Hartford, Monroe, Newington, Plainfield, Plainville, Portland, South Windsor, Thomaston, Waterford, Beacon Falls, Bethlehem, Bethany, Cheshire, Cromwell, Deep River, East Hartford, East Haven, Eastford, Easton, Deep River, Derby, Greenwich, Hampton, Harwinton, Killingworth, Marlborough, Middlebury, Middlefield, Naugatuck, Newtown, New Milford, Norwalk, Portland, Prospect, Ridgefield, Redding, Rocky Hill, Roxbury, Seymour, Simsbury, Somers, Southbury, Stratford, Tolland, Washington, Westbrook, Weston, Windsor Locks, Woodbridge, Woodbury, North Branford, Farmington, Berlin, Guilford, Meriden, North Branford, Norwalk, Farmington, Berlin, Hartford and Woodstock

**John Vickery, Appraisal Senior Project Supervisor**

**Summary** John joined Tyler Technologies after a successful 22 years as the City Assessor, in Burlington, Vermont. With 28 years as a municipal appraiser, John has directly participated in reappraisal projects, commercial valuation, apartment valuation, market research and analysis, model development and analysis, narrative valuation reporting, and property valuation appeals in court.

**Education** Johnson State College, B.A. 1992

- Fundamentals of Mass Appraisal, IAAO
- Fundamentals of Assessment Ratio Studies, IAAO
- Assessment Administration, IAAO
- Fundamentals of Real Property Appraisal, IAAO
- Income Approach to Value II, MAAO
- Marshall & Swift Cost Manual, NAIFA
- Income Approach to Value I, MAAO
- Income Approach to Value 102, IAAO
- Valuation of Industrial Properties, IAAO
- Real Estate Sales Course, AREA
- Planning an In-House Revaluation, IAAO
- Residential Case Study, AI
- Depreciation Analysis, IAAO
- Residential Modeling Concepts, IAAO
- Commercial/Industrial Modeling Concepts, IAAO
- Uniform Standards of Professional Appraisal Practice, MBREA
- Appraising the Single-Family Residence, Realtors Assoc.
- Foundations of Real Estate Appraisal, Realtors Assoc.
- Residential Property Construction and Inspection, AI
- Residential Data Collection, VT Tax Dept.

**Work Experience** **Appraisal Senior Project Supervisor, Tyler Technologies, 2023-Present**  
Municipal revaluation projects, residential and commercial valuation and review, market research and analysis, model development and analysis, narrative valuation reporting, and valuation defense.

**City Assessor, City of Burlington, 2001-2023**

Managed assessment office and chair of the Board of Assessors. Duties included residential and commercial valuations, review, market research and analysis, model development and analysis, narrative valuation reporting, and valuation defense. Oversight of 2005 and 2021 citywide reappraisal projects. Annual valuation of business personal property. Assistance with CAMA conversions, and two Tax Increment Finance district.

**Town Assessor, Town of South Burlington, VT, 1999-2001**

**Town Assessor, Town of Williston, VT, 1997-1999**

**Skills and Certifications** Vermont Master Assessor Certification (IV)  
Connecticut Residential Assessor Exam 2024  
Proficient in Patriot Properties AP5 CAMA  
Proficient in NEMRC Tax Adm. software

**Project Experience** Rhode Island, Newport  
Pennsylvania: Wayne County  
Vermont: Burlington, Bethel  
Missouri: Jackson County

**Jacob Dorman, Senior Residential Reviewer**

**Summary** Jacob has obtained the VT Approved Project Supervisor and VPA Level III Vermont Assessor Certification. He has been working full time in the real estate appraisal profession for ~10-years. Jacob has a diverse appraisal background with assessment services for municipalities and residential single property appraisal for lenders and banks. Mr. Dorman's has had multiple jobs as a town officer from Assessor Clerk to Deputy Assessor in Burlington, VT. These diverse roles have equipped him with experience conducting valuations of residential, commercial, and apartments and experience conducting property appeals hearings at the Board of Assessor to Board of Tax Appeal levels. . Jacob is versed in multiple CAMA systems, and property appraisal report writing

**Education** Castleton University: Castleton, Vermont – bachelor's degree | Business Administration: Concentration in marketing, 2010 – 2014

**Work Experience** Vermont Approved Project Supervisor (VT Rule 86-P65)  
Vermont Property Assessor Level III (VPA3) – 08/04/2021  
Vermont Certified Residential Real Estate Appraiser Trainee – March 2016 to Present  
Deputy Assessor – City of Burlington, Vermont – Nov 2021 – April 2024  
Assistant Commercial Appraiser – City of Burlington, Vermont – Jan 2020 – Nov 2021  
Assistant Assessor, Town of Proctor, Vermont – November 2017 – November 2021  
Residential Data Collector, Town of Wallingford, Vermont – June 2017 – July 2018  
Assessors Clerk, Town of Castleton, Vermont, May 2016 – March 2018  
Town Lister, Town of Hubbardton, Vermont, March 2015 – September 2015

**Technical Skills** CAMA systems include Patriot, Vision, Proval, and MicroSolve as well as the VT tax-based system New England Municipal Resource Center (NEMRC) including VT PIE  
Mapping applications include ArcGIS. Multiple Listing Services (MLS).  
Microsoft Office applications Word, Excell, PowerPoint, Power BI.

**Project Experience** Burlington VT 2021, Wallingford VT 2018, Castleton VT 2024, Hartford VT 2024.

**Benjamin Pudvah, Residential Reviewer**

**Summary** Benjamin Pudvah has been in the real estate appraisal profession full time since early 2022. Ben has physically inspected hundreds of homes from single family dwellings, condominiums, to 2–4-unit apartments. In addition, Ben has scheduled inspections, entered property data into various CAMA systems.

**Education** Appraisal valuation courses taken: Residential Data Collection course.

**Work Experience** Worked on the Town of Stowe, Vermont townwide reappraisal project as a data collector/appraiser trainee. Also, assisted with data collection and property data entry on the Winooski citywide reappraisal project. Ben is now working as a Residential Reviewer, participating in the conversion of property data from MicroSolve CAMA to Catalis/Patriot CAMA. Provided valuation assistance with residential condominiums.

**Technical Skills** Property inspection, Catalis/Patriot Properties CAMA. MicroSolve CAMA.

**Project Experience** Vermont reappraisals projects, Saint Albans City, Town of Castleton, Town of Hartford.

## Tyler Scope of Reappraisal

Tyler is herein responsive to the Town of Bristol's complete Town-Wide Reappraisal for the Grand List. Tyler shall generate accurate, defensible estimates of the fair market value for every property in the Town of Bristol. In addition, the models shall be integrated into the appraisal software system so that future construction, subdivisions, and changes to existing properties may be valued using the same methodologies.

Tyler is very familiar with the Town's MicroSolve CAMA software provided by New England Municipal Resource Center (NEMRC). All properties are currently listed using this software; the reappraisal project will be completed using this software.

### Town Data

Tyler is aware the Town of Bristol is in Addison County in Vermont. Bristol has a land area of about 42.20 square miles and approximately 3,900 residents. Bristol has a broad mix of land uses including commercial, industrial, retail, and residential. There is a significant historic commercial and business district.

### Parcel Count

Per the RFP, current residential uses also include condominiums, 2-4 family homes, multi-unit apartment buildings, residential subdivisions, and some large, custom-built homes. Combined parcel breakdown as of July 1, 2023, is as follows:

Parcel Type	Class	Count
Residential I	R1	938
Residential II	RII	218
Mobile Homes	MHU	79
Mobile Homes	MHL	115
Seasonal I	S1	28
Seasonal II	S2	5
Commercial	C	66
Commercial Apt.	CA	20
Industrial	I	6
Utilities	E	3
Utilities	O	0
Other	O	16
Woodland	W	0
Miscellaneous	M	<u>117</u>
<b>Sub-Total</b>		<b>1,621</b>
Cable		1
Veterans		16
Special Exemption		4
Non-Taxable		<u>95</u>
<b>Total Active Real Parcels</b>		<b>1,737</b>



## Town Scope of Service Requirements

Per the RFP, Tyler shall comply with the Town's Scope of Services requirements:

- a. Tyler shall review existing CAMA property descriptions, neighborhood delineations, tax maps, zoning descriptions and other pertinent and relevant information to understand the current assessment system.
- b. Tyler shall analyze three years of sales information, verifying the sales information and correcting, as needed the associated assessment information. Generate a "sales book" including all property transactions that were considered in creating or adjusting land schedules, cost tables and depreciation schedules.
- c. Tyler shall review and refine neighborhood delineations, analyze vacant and improved property sales, develop a land schedule that results in accurate estimates for land values for every property in town.
- d. Tyler will visit each property for the purpose of completing an interior inspection of all Residential (year-round as well as seasonal), Farm/Agricultural and Commercial buildings and will update property data, sketches, and photos of each property.
- e. Tyler shall produce new models in the CAMA system for cost and depreciation, sales comparison, MRA, income and any other applicable valuation methods for all types of real property in the Town of Bristol.
- f. Tyler shall review existing CAMA/NEMRC property descriptions.
- g. Tyler shall produce, verify fair market value estimates for every property in Bristol. Each parcel file shall include a digital CAMA cost sheet and property record card.
- h. Tyler, working with the Listers, shall produce a Change of Appraisal Notice to be mailed to every property owner as the official notification.
- i. Tyler shall assist the Listers/Assessor with the formal Lister's grievances and Board of Civil Authority (BCA) appeals.
- j. Tyler shall produce manuals clearly explaining the valuation methods, the data, and the processes to aid the Town in defending the new assessments, and valuing new properties, subdivisions, and changes to existing properties. This includes a description of land grading values.
- k. Tyler shall complete all of these activities in compliance with Vermont's "three-prong test," or other accepted appraisal practices and conforming to all applicable state statutes and rules.
- l. All data, maps, reports, forms, worksheets, and other materials used for this reappraisal shall belong to the Town of Bristol.
- m. Tyler will develop, maintain, and share a spreadsheet containing status of work with a detail sheet tracking status of property visits.

## Description of Project

Tyler realizes the reappraisal project shall involve:

- The development of new land schedules and neighborhood delineations to estimate land values for every site in town.
- Full analysis of sales over a three-year period to formulate accurate, localized cost and depreciation schedules to develop a market adjusted cost approach to all property types.
- Depreciation schedules shall adhere to standard MicroSolve CAMA table structures, Marshall, and Swift cost tables.
- Multiple digital photos of each property; front and rear photo of every major structure or dwelling, one photo of every outbuilding and or value influencing element (i.e., ponds, exceptional view, wetland, etc.). Photos are to be attached to record within the CAMA software. New front photo of main structure coded as #1 in CAMA.
- Exterior and interior physical inspections of all properties to gather accurate and pertinent information.
- Measurements to be taken if necessary or when needed for accuracy.

These, and any other applicable methods, shall be incorporated into the existing MicroSolve CAMA software system, and the existing property listing data will be reviewed to assure compliance with the new analyses. Tyler shall work closely with Bristol Listers throughout the project

## Town's Responsibilities

Per the RPF, the Town shall be responsible for the following

- Printing and mailing costs associated with the Change of Appraisal Notices and Reappraisal Notices.
- Working with Tyler as to deadlines for completion of the project.

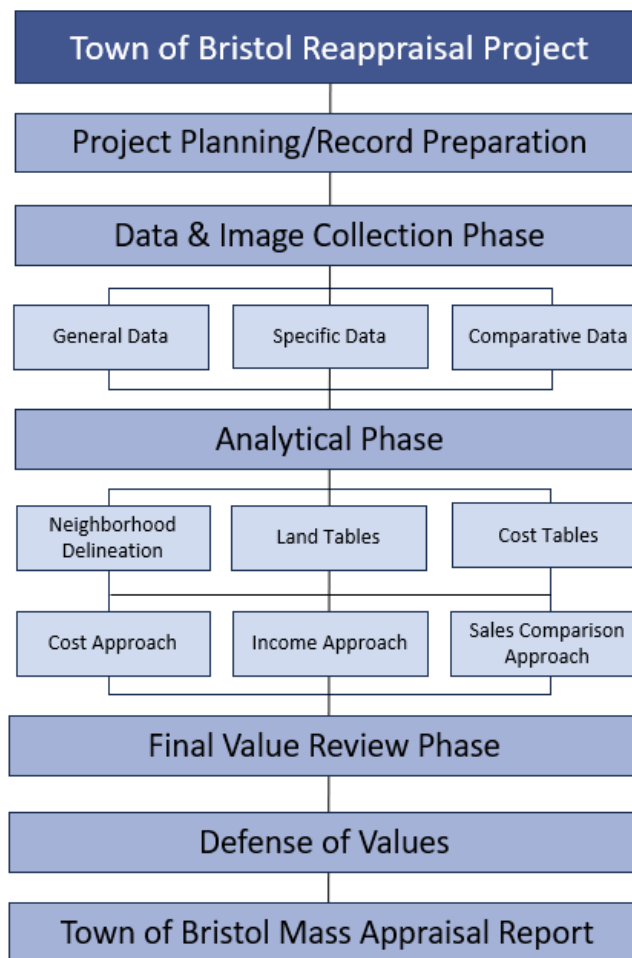
## Tyler Appraisal Process & Methodologies

Tyler has developed a set of best practices that will be used as the blueprint for our overall approach to this project. Several distinct, but related, phases or activities take place over the course of the project. These begin with project planning and continue through project deliverables, including a review of the project performance measures. The goal of a reappraisal is to estimate market value. As defined by the International Association of Assessing Officers (IAAO), market value is:

*the most probable price which a property should bring in a competitive and open market under all conditions requisite to a fair sale, the buyer and seller, each acting prudently and knowledgeably, and assuming the price is not affected by undue stimulus* (“Standard on Ratio Studies,” *Assessment Journal*, Sept./Oct. 1999, p. 60).

The following appraisal process chart and the work plan identify the key steps in the Town’s reappraisal. In our proposal, we have taken a number of these key elements essential to a successful project and provided a more detailed explanation of the steps involved in each, as set forth in this proposal.

### The Appraisal Process <sup>1</sup>



1: Adapted from the Property Assessment Valuation manual, Second Edition, Copyright 1996 by the IAAO

## Project Planning & Record Preparation

A successful project begins with planning. Following contract signing, Tyler will initiate meetings with the Town of Bristol's representatives to formalize a communications plan. As a beginning point, we propose the communications plan include the following:

### Project Planning

**Monthly Status Meetings** shall be held to review project progress, issues, and proposed changes. The monthly meetings are generally the same day, time, and place. Items covered in the meetings will include:

- Updated project plan
- Tasks completed during the last reporting period
- Tasks planned for the next reporting period
- Tasks planned for completion during the next reporting period
- Anticipated staffing needs
- Outstanding issues, current status, and plans for resolution
- Any issues that can affect schedules
- Any issues that can delay or impact the completion of the project

**Quarterly meetings** shall be held with designated Town representatives to discuss general project topics and to review plans for the next quarter. The intention of this meeting is to ensure visibility into project progress and facilitate open communications.

## Record Preparation Using the CAMA Databases during the Reappraisal

The reappraisal database can be created by using the Sales Analysis database within CAMA or by creating a different schema, which must be done by the CAMA vendor. Most of our clients choose the former as there are no costs associated with its creation or for additional support fees. The User Audit table tracks changes made by users in the live file (Real Estate database). A report is created periodically throughout the project and the changes are entered into the Sales Analysis or Reval schema. A log is kept to track the dates of these reports to ensure no changes are missed.

Approximately two (2) weeks before notices are mailed (which is the time required to have the new data posted to the CAMA website), several mismatch reports are done to ensure that the files are coordinated:

1. Parcel mismatches (both ways)
2. Owner name mismatches
3. Mailing address mismatches

At that time, the Sales Analysis database is copied over the Real Estate database. Prior to this, we recommend a static copy of the Real Estate database be created to preserve the file for future access.

Our clerical staff has years of experience with Town's CAMA, however, to minimize errors, edits are done periodically to the database.

*Table 1: Sample Residential Edits*

Recommended Reappraisal Data Edits
Zero bathrooms, rooms, or bedrooms
Bathrooms > Bedrooms
Bathrooms > 5 (or whatever makes sense in your community)
Bedrooms >= Rooms
Zero square footage (on dwellings or outbuildings)
SFLA > 3,000 sf and grade < C
SFLA < 800 sf and grade > C
No heat (or inconsistent fuel and type)
Sale with no sale price coded as valid sale
Wall height <5 (commercial property)
LUC vs. Living units or Occupancy
Basement area > 1 <sup>st</sup> floor area (sketch is layered)
Fireplace opening and no stack (or vice versa)
Features/outbuildings with no units
Outbuilding values > \$30,000 (or whatever makes sense in your community)
Neighborhood assignment consistency. This could be a street listing or a GIS map (very helpful!)
Value change extremes
A good rule of thumb – if you found an error on one property – chances are there are others.

## Data Collection Phase

Tyler will utilize a combination of existing data and new data gained from interior and exterior inspections to create new property record cards or computer-generated data sheets for each parcel including, but not limited to size, area, frontage, width, depth, shape, topography, productivity, site improvements, utilities, access, zoning, and location. This information shall include a land sketch. Tyler will accurately measure all improvements where previous records are inaccurate and prepare a complete outline sketch to scale of the major buildings showing all additions, porches and appendages with dimensions and necessary identifications on the property record cards. All pertinent construction data of improvements will be entered/updated appropriately.

Tyler shall complete and file by property location Property Record Cards. These cards shall contain all manner of information affecting value, including location of property, classification as to usage, owner of record, source of title, size, shape and physical characteristics of land, with the breakdown of front feet, square feet or acreage, along with the unit of value applicable to each, public utilities available, public improvements, census tract number, zoning regulations in effect as of the assessment date.

Tyler shall provide property record cards, supplies, equipment, forms, literature, and notices to be used in this project at no additional cost to the Town. All forms shall be subject to approval by the Lister/Assessor as to format, design, content, shape, size, color, quality, and quantity and shall be further subject to the approval of the Secretary of the Office of Policy and Management as may be required by Vermont General Statutes.

All physical improvements shall be listed giving all interior and exterior construction details, quality of construction, age, condition, replacement values, percent of physical, functional, and economic depreciation, depreciated values, fair market value and 70% assessment value will be shown. A computer-generated sketch of all buildings, with the appropriate scale of such sketch, shall also be shown on these cards as well as a photo image of each major structure.

## Data Mailer Process

To ensure public confidence, taxpayers must play an important role in monitoring the quality of data collection. Tyler shall send data mailers to the owner of each improved parcel to which entry was not gained. The format of these mailers and the schedule of mailings are subject to the approval of the Lister/Assessor. The data mailers shall list all fields that affect value, a stamped return-addressed envelope, and a cover letter, which explains the purpose and content of the mailer. The format and content of the data mailer, as well as the cover letter, shall be subject to approval by the Lister/Assessor

Tyler will inspect the exterior of each structure as well as obtain interior data through mailing questionnaires to all Town property owners. Each data mailer will have the most updated information from the Town's CAMA System. Every property owner will have a certain amount of time to respond to this data mailer which will be described in the letter that will go along with the property record card factsheet. Every property record card factsheet will include the following:

1. Owner Names
2. Physical Address of the Property / Parcel Number and Card Number
3. Sketch – showing outline of the subject property and property features

The data mailer shall contain directions on how to correct inaccurate information. Tyler shall be responsible for making any corrections to the existing CAMA database as a result of the returned data mailers and Tyler shall field inspect such properties as the Lister/Assessor shall require prior to making the corrections shown on the returned data mailers. The data mailer will offer the option of an appointment for inspection.

The mailers for residential parcels shall include, but not be limited to, capturing the following:

- Property type classifications
- Parcel size
- Utilities
- Building style
- Year Built
- Exterior wall material
- Roof Style and composition
- Flooring types
- Type of heating system
- Type of heating fuel
- Central air conditioning
- Generator
- Total number of rooms
- Number of kitchens
- Number of bedrooms
- Number of full bathrooms
- Number of half bathrooms
- Basement type
- Finished basement area
- Number of fireplaces and type
- Garage Type – attached, detached, finished area
- Outbuildings – number of, size and type
- Pools, hot tubs, pool houses
- Solar Panels

All data mailer responses will be taken, and data entered, into the Town's database. A data mailer response with any insufficient information or a request by the taxpayer to visit the property will be handled in a different phase of the review process called onsite collection inspection by a data collector on the property in order to correct the pertinent information needed.

Tyler's procedures for handling all returned data mailers via returned mail are as follows:

1. Date stamp the data mailer when it is received (use the postmark date on the envelope).
2. Highlight every change indicated by the homeowner with a highlighter.
3. In the entry screen, add an entry for data mailer returned. Enter the date it was returned: the initials are DM and use code ## for purpose.
4. Determine whether the change requires an inspection (see guidelines below).
  - If an inspection is required, phone the owner and attempt to schedule an inspection. It is important to inform the taxpayer that the change will not be made without an inspection. Once the inspection is complete, enter changes into the CAMA system.
  - If the determination is that a drive by inspection is required, enter changes into the CAMA system once the drive by is complete.
  - If the determination is that no inspection is required, which will include those indicating no changes are necessary, make any changes in the CAMA system.
5. Items that we cannot change will be submitted to the Lister/Assessor's Office.
  - Changes to Owner's name or Address
  - Changes to the number of living units (up or down)
  - Owner states the photo is incorrect
  - Changes to the year built of more than +/- five years



## Residential Interior and Exterior Inspections

The following describes the step-by-step processes for onsite physical interior and exterior inspections:

1. Through the Lister/Assessor, Tyler will provide written notification to the Local Police Department and any other applicable law enforcement agencies of the dates and times that fieldwork will be conducted in specific neighborhoods. Social media outreach can be used in advance of collection in designated areas to spread awareness. Notification will be provided at least seven (7) days prior to the time that the work is to be performed.
2. At all times while on private property, all Tyler field personnel will plainly wear an identification badge containing a clear, color photograph of the individual, Tyler's name, the individual's name and signature, and the signature of an official designated by Tyler and approved by the Lister/Assessor. Tyler's field personnel will also wear vests to further identify themselves and the project to the public.
3. The inspection of residential properties will be conducted using a systematic and routine work schedule between the hours of 8:00 a.m. and 5:00 p.m. Monday through Friday. If Saturday inspection work is required due to schedule or other circumstances, Tyler personnel will conduct those inspections between 9:00 a.m. and 4:00 p.m. There will be no Sunday inspections and no inspections will be conducted before sunrise or after sunset.
4. During the initial visit to the property, Tyler data collection and supervisory personnel will knock at the entrance, announce their arrival, identify themselves, state the purpose of the visit, collect information regarding the interior by interviewing the resident, and request permission from an adult resident to proceed with the interior inspection of the property. After permission is granted the field representative will note changes to existing data, measure, describe, and diagram the exterior of all the improvements on the subject site.
5. The dates and times of all inspection attempts will be permanently recorded on the property record card (PRC) from the individual field inspection effort. In addition, the identity of the field representative shall be recorded on the PRC.
6. If the property owner refuses interior inspections to the property or any portion thereof, Tyler field representatives will courteously leave the property. In turn, Tyler will inform the Lister/Assessor of each occurrence in writing on a biweekly basis. The field representative will record on the PRC the property address, account number, date, and time of the refusal. In addition, the field representative will request the name of the person refusing the inspection, the reason for the refusal, and include all the aforementioned information on the previously described list to be presented to the Lister/Assessor biweekly.

Characteristics which will be collected or verified during the Onsite Physical Field Inspection phase include:

- Owner Verification
- Address Verification
- Story Height
- Style
- Exterior Walls
- Year Built
- Occupancy Type
- Land Use Code
- Foundation
- Number of Rooms
- Number of Bedrooms
- Number of Baths
- Heating Type
- Fuel Type
- Central A/C
- Fireplace Type and Number
- Miscellaneous Features
- Percent Complete
- Outbuildings
- Building Sketch
- Attached Additions
- Recent Sale Verification

7. The Project Supervisor will be responsible for the quality and quantity of all field work performed by Tyler. The Project Supervisor will review the raw data collected by the field representative to ensure the accuracy of the data reported, sketches, and measurements recorded before the data is encoded.
8. It is understood that the Lister/Assessor has the right to remove any field representative from the project reported to be unprofessional or discourteous to residents.

Tyler will provide a written, weekly schedule of field work, including: the name of the field representative, the vehicle type and license number of the field representative's vehicle, the neighborhood to be inspected, and the number of days the field representative is expected to be in the neighborhood. The Lister/Assessor shall provide a copy of this schedule to the Town, various police departments, and the local news media.

## Commercial and Industrial Field Inspections

Commercial and Industrial properties will be identified as structures used for commercial purposes and will include, but are not limited to, office buildings, warehouses, manufacturing plants, retail stores, and apartment units with more than four units. Properties with four units or less will be collected and subsequently billed as residential properties regardless of property classification in the CAMA system.

The purpose of a Commercial and Industrial field data collection effort is to verify/update property characteristics such as property address, land characteristics/uses, business name or tenant roster, building size, and condition and an interior inspection to determine building use, condition, functional utility, as well as the existence of interior and exterior features such as sprinklers, elevators, etc. Updates to the field record card will be noted for subsequent data entry. Where applicable, experienced commercial data collectors will verify sales and request and record rental and vacancy rates. Structures without a year built are to be updated with the actual year built if available, otherwise the data collector will estimate the year built.

In parallel to the residential data collection, commercial data collectors will visit each commercial parcel and verify, collect, and record data. The data collectors will make an interior inspection of each principal structure except when a parcel is vacant, or permission is denied. Structural features, components, or characteristics shall be identified and listed. The dates and extent of all major remodeling shall be determined and recorded in the notes section of the data collection form. Other improvements, built-in other features and attached improvements shall be identified, measured, and listed.

All uses of each structure type shall be determined at the time of inspection and recorded on the data collection form. A site plan will not be required for commercial and industrial properties where all necessary information can be shown on a printed data collection form sketch grid. The physical condition and functional utility for each building or structure shall be verified by qualified appraisal personnel. The application of economic obsolescence shall also be considered by the appraiser and its effect on the total improvement value.

## Image Collection

During inspections, Tyler shall take multiple digital photos of each property; front and rear photo of every major structure or dwelling, one photo of every outbuilding and or value influencing element (i.e., ponds, exceptional view, wetland, etc.). Photos shall be attached to record within the CAMA software. New front photo of main structure coded as #1 in CAMA.

## Performance Standards “Best Practices”

Tyler’s Field Data Collection and Quality Control processes have been internally developed and rigorously field-tested on tens of millions of parcels.

By applying our mass appraisal methods and procedures to all designated parcels in the Town, Tyler will achieve a high degree of uniformity and an equitable level of valuation between properties throughout.

The appraised values resulting from the reappraisal will conform to the following Standards for Ratio Studies - 2013 established by the International Association of Assessing Officers (IAAO) and the Uniform Standards of Professional Appraisal Practice (USPAP 6) as well as generally accepted standards within the mass appraisal industry. The sales set for this study, unless agreed otherwise by both parties, will be valid sales during the three (3) years prior to the date of value.

Table 2: IAAO Standards for Ratio Studies

Property Type	Median Value Level	COD	PRD	PRB
Single-family residential, including condos, in newer or more homogeneous areas	90% to 100%	5 to 10	.98 to 1.03	-.10 to .10
Single family residential in older or more heterogeneous areas	90% to 100%	5 to 15	.98 to 1.03	-.10 to .10
Other residential – rural, seasonal, recreational, manufactured housing, 2 – 4 unit family housing	90% to 100%	5 to 20	.98 to 1.03	-.10 to .10
Income-producing properties in larger areas represented by large samples	90% to 100%	5 to 15	.98 to 1.03	-.10 to .10
Income producing properties in smaller areas represented by smaller samples	90% to 100%	5 to 20	.98 to 1.03	-.10 to .10
Vacant land	90% to 100%	5 to 20	.98 to 1.03	-.10 to .10
All Properties	90% to 100%	5 to 15	.98 to 1.03	-.10 to .10

**Median:** A measure of central tendency. The value of the middle item in an uneven number of items arranged or arrayed according to size; the arithmetic average of two central items in an even number of items similarly arranged.

**COD:** The Coefficient of Dispersion (COD) is the average deviation of a group of numbers from the median expressed as a percentage of the median. In ratio studies, the average percentage deviation from the median ratio.

**PRD:** The Price-Related Differential (PRD) is the mean divided by the weighted mean. The statistic has a slight bias upward. Price-related differentials above 1.03 tend to indicate assessment regressivity; price-related differentials below 0.98 tend to indicate assessment progressivity.

**PRB:** Price-Related Bias (PRB) is an index of price-related bias obtained by regressing percentage deviations from the median ratio on percentage changes in a value proxy, which is obtained by giving equal weight to assessments and sales prices so as to minimize measurement biases.

## Analytical Phase

### Value Review Guidelines

Tyler will gather, record, and analyze construction and market data necessary to appraise the revalued properties. This data will be noted on the individual property record cards and serve as a basis for the development of guidelines for cost, market, and income using economic coefficients needed when applying the three approaches to value. The general supporting data to be analyzed will include cost data, lease data, economic data, and sales data. The guidelines that will be developed from this analyzed data will include replacement cost schedules, depreciation schedules, economic rent schedules, income capitalization rates, comparative property sale units, unit land values, and gross income multipliers.

Tyler's preferred method of building cost calibration is through the analysis of new construction sales. We will assess cost levels versus Marshall & Swift as a secondary approach if there are ample sales, or as the primary approach if there are not. We will also assess commercial and outbuilding rates versus Marshall & Swift. The first step in calibrating the value tables in the CAMA system is to investigate the current setups, particularly with land. Once completed, Tyler will collaborate with the Lister/Assessor to create a plan for how to proceed. Our goal is to maintain as much of the current methodology as possible in order to maintain consistency and we will address any problems or concerns that are identified.

Tyler will complete a depreciation analysis using regression by extracting the percent good from each sale and plotting it against age. We adjust the resulting table to reflect the true current market for all ages and conditions of properties in the Town. Commercial depreciation is based on the economic life (i.e., 50-year life) and the appropriate table will be used based on the types of properties to be appraised.

Tyler shall prepare a report and deliver it to the Lister/Assessor's Office for approval showing the results of this comprehensive analysis. It shall contain a set of recommendations, including a proposed pricing schedule prepared by Tyler and encoded by Tyler based upon existing tables in the CAMA system.

### Neighborhood Delineation and Analysis

Neighborhood Delineation and Analysis is a study of external forces or influencers which could influence property value. It also involves conclusions on the typical housing, economic, social, and demographic characteristics of the geographic area considered a homogeneous neighborhood.

A neighborhood for mass appraisal purposes can be defined as a geographical area exhibiting a high degree of homogeneity in residential amenities, land use, economic, social trends, and housing characteristics. Each neighborhood evolves over time to complete a life cycle. The three main stages are:

1. **Improving stage** characterized by development and growth
2. **Static stage** characterized by a leveling of values
3. **Declining stage** characterized by infiltration and decay

The cycle can repeat itself as evidenced in older urban neighborhoods that have gone through a gentrification based upon the housing characteristics and accessibility to the central business district.

A neighborhood in the CAMA system is defined as the largest geographic grouping of properties where the significant economic forces of those properties are generally uniform. The selection criteria to establish ratings should include at least 50 to 75 percent of the dwellings located in the delineated neighborhood. Difficulty in assigning a general neighborhood rating indicates that the delineated area is not a reasonable statistical measuring area and should be reconfigured. A neighborhood containing a minority of structures with modest deviation from typical conditions can be used.

Before analytical work can begin, neighborhood data should be collected in order to delineate neighborhoods. A neighborhood will be created when an area exhibits homogeneity in residential amenities, land use, economic and social trends, and housing characteristics. Each parcel will be assigned a neighborhood code, which will be displayed and maintained in the CAMA system.

Neighborhood data should be complete in order to stratify and determine the variations in selling prices due to location. The data collected should include school district; various neighborhood characteristics such as the type (urban, suburban), the predominant use class, whether it is declining, improving, or relatively stable, accessibility to the central business district, shopping centers, housing characteristics, range of selling prices, etc.; and a rating of the relative desirability of the neighborhood.

The first step in land valuation is market analysis: stratification, determination of units of comparison, and data analysis all driven by a comprehensive neighborhood delineation effort. Delineation of neighborhoods for commercial and industrial properties is a primary driver in the valuation of land, the application of the income approach and the application of the cost approach.

Significant characteristics in defining neighborhoods include:

- Physical boundaries
- Natural – as rivers, streams, woods, etc.
- Man-made – as roads, railroads, power lines, etc.
- Building characteristics: type, quality, age, and condition
- Type of occupancy: such as industrial, apartment, retail, and office
- Current zoning: Preexisting nonconformity and development rights
- Typical land size and land valuation
- Sale prices
- Economic Forces: In most circumstances, properties will compete with each other within the same immediate neighborhood

The delineation process will involve the following procedures:

- Establish base neighborhood delineation maps from the Town's tax maps
- Each defined neighborhood will be driven and analyzed in the field. Based on physical observation and the other factors previously mentioned, the neighborhood boundaries could be:
  - Deleted and the properties included in an adjoining neighborhood when economic conditions indicated they were similar, or
  - Create a new neighborhood from part of an existing neighborhood where there was clear indication that the economic level of value and/or similarity is different from that of its original proposed neighborhood

Upon completion of the field review, the boundaries will be refined down to the parcel level as part of the computer database using the CAMA system

## Land Valuation

Once the neighborhood boundaries have been identified, Tyler's experienced mass appraisers will analyze sales of vacant land in each neighborhood. In cases where the sample of vacant sales is inadequate, land residual techniques will be used. All land will be valued as if vacant.

Land tables will be built for each neighborhood based on a typical lot size for the area. Deviations from the norm will be adjusted using the appropriate incremental values derived from the market. When necessary, positive, or adverse influences and various land breakdowns on use will be done at the parcel level. Factors which affect the value include such things as location, size, shape, topography, access to railroads, roads, waterways, use, and other influences will be considered in establishing final values.

The allocation of land and building values will be derived from the market. A separate land value plus building value will equal total value. Tyler will establish its opinion of unit land values – expressed in acreage or square feet – uniformly throughout the Town. Once reasonable land values have been established, the development of the cost approach model can proceed. The cost approach model, like other models, must be calibrated to the local market.

## Sales Verification and Validation

A valid cost model requires a sufficient quantity of accurate, reliable, and verified market data for a proper and effective analysis. A close examination of recent transactions within the real estate marketplace is required to isolate the bona fide arms-length transactions. Tyler has developed standardized procedures for this process using IAAO and USPAP guidelines. The sales data must be screened and processed in order to determine the degree to which it reflects the behavior of typical buyers and sellers in the open marketplace. A certain amount of mass appraisal judgment is required to understand the interactions of market factors and thus determine which ones are suitable for use in mass valuation. It is imperative that the mass appraisers are familiar with the market areas and corresponding market conditions in which sales will be validated.



## Details of Cost Table Calibration and Index

### Methodology

After Land Valuation and Sales Verification/Validation are completed, the local construction cost index study and the calibration of the residential depreciation tables can take place. The local construction cost index is the ratio of the cost to construct a dwelling in one location compared with the cost to construct the same dwelling in another location at a given date. The cost schedules will be calibrated to closely reflect the region encompassing the Town.

The cost index will be developed from an analysis of sales of newly constructed, average quality dwellings located within the Town and/or sales of "relatively" new, average quality dwellings which have been properly adjusted for time. This is a four-step process that should be completed in the following order:

1. Develop a market trend based on re-sales of improved residential properties within the Town.
2. Trend the construction costs for each new dwelling to be used in the index study to an estimate of the reappraisal date.
3. Calculate a cost ratio for each new dwelling by comparing the CAMA system Replacement Cost New (RCN) to actual construction costs.
4. Analyze the individual cost ratios and correlate an overall local construction index.

In the event that a sufficient number of newly constructed, average quality dwellings are not available to adequately document the local index, supplemental sources may include Tyler's cost estimates of stock or standard building plans.

### Index Calculation

The calculation process to establish the local index is as follows:

1. Trend all sales to be used in the index study using the monthly trending factor established in the market trend analysis.
2. Subtract the land value estimate from each adjusted sales price. The result is the indicated dwelling or building residual value.
3. Obtain the Replacement Cost New for each dwelling through the CAMA system.
4. For each sample, divide the indicated dwelling residual value by the CAMA system "Base Value." The result is the index factor for the improvements.

### Calibrating the Residential Depreciation Tables

The tables will be calibrated to reflect the local market conditions for the Town. The calibration process is completed by analyzing verified sales which are contained in the sales history file.

## Valuation Approaches

Tyler uses the three accepted approaches or methods to arrive at value for residential properties. The cost approach provides an estimate of value based upon the replacement cost of the improvements, less depreciation, plus the value of the land. The income approach estimates value by capitalizing the net operating income of a property. The market or sales approach estimates value by comparing similar properties to the property being appraised. Using different units of comparison is not intended to produce higher values, just more valid and reliable values. In general, rate/square foot and rate/per unit (such as apartments and hotels/motels) will be the most common unit of comparison in the Town.

## Market Approach

With this method of the reappraisal process, Tyler will use the analytical tools in Town’s CAMA system to develop markets for residential improved parcels, where possible. Therefore, both the cost and comparable sales approach will be considered when arriving at the final estimate of value. When applicable, up to five comparable sales for each subject will be available for review. This comparable sales approach allows us to better reflect market activity in this uncertain economy and explain the anomalies that may occur with bank sales, foreclosures, and other distressed sales. A market model is a statistical picture of the elements affecting sale price within the market area. By determining the relative effect of specified property characteristics on sale price, markets will be constructed and used to predict value for unsold properties.



Figure 1: Example of comparable grid

## Income Approach

With this method, the income and expense stream of a property is examined from an investor's point of view. The goal is to achieve a market value by estimating what an informed investor would pay for the income stream associated with a particular piece of real estate. The income approach is typically applied to commercial properties, including apartments, restaurants, and shopping plazas.

## Cost Approach

With this method, the probable selling price is calculated by estimating how much it would cost to provide a replacement building of similar condition, quality, and utility. Local construction costs are analyzed along with land sales to develop what is called the "replacement cost" method. This method is based on the premise that if land value is added to what it would cost to replace the building new – less an allowance for physical, functional, and economic depreciations – a rational estimate of the market value can be obtained. The cost approach is computed for all types of property. The cost approach is calibrated to the local market using local sales.

For the valuation of commercial and industrial properties, models will be calibrated to predict fair market value using two approaches, the income approach, and the cost approach. The income approach best reflects the actions and motivations of investors who buy certain types of commercial properties in the Town but is not applicable for every type of property appraised (e.g., vacant lots, certain manufacturing, service stations).

Unlike residential properties, the appraisal of commercial and industrial properties requires using multiple units of comparison to arrive at an accurate value estimate. Units of comparison are those variables or characteristics that investors use in making decisions in purchasing commercial and industrial properties. Units of comparison enable appraisers to distill value to a specific rate such as rent/square foot so that comparison may be made with properties that are somewhat dissimilar.

## Lister/Assessor's Input

For each type of property, the Lister/Assessor will choose the default approach. Table 1 below shows the methodologies that are most often used.

*Table 3: Methodologies Most Often Used*

Type of Property	Valuation Methodology
Residential	Cost and market
Commercial and industrial properties, including apartments	Cost and income
Special purpose properties	Cost
Exempt properties	Cost

The Town's parcels will be analyzed with the following units of comparison:

1. Sale Price/acre
2. Income or Sale Price/square foot
3. Income or Sale Price/apartment unit
4. Income or Sale Price/parking space
5. Income or Sale Price/hotel room
6. Sale Price /nursing bed
7. Cost/square foot
8. Sale Price per square foot or acre of land

Tyler will analyze vacant land sales for the various types and sizes of land found in Town's neighborhoods and commercial areas. We will also study residual indications of land values. Based upon these analyses, tables will be developed for land valuation. This process is best described as an application of the sales comparison approach.

## Approaches to Value and Appropriate Units of Comparison

### Land Values and Models

Land models will be created for the reappraisal to accommodate the land valuation for parcels in the commercial, industrial and apartment classes of property. Each of the models has rates which will be applied to individual parcel land formats by location and land code.

Wherever possible, the land model rates will be developed from an analysis of valid vacant land sales located within each model and location. Though there will be vacant land sales for the Valuation, it is unrealistic to expect that sufficient sales data would exist for every unique location within each neighborhood model. Where no vacant sales exist in each location, comparative rates used in similar models will be used to determine the desired rates.

### Sales Analyses

Sales analyses of all properties sold shall be performed as a means of sustaining the values derived. These analyses shall be done on the aggregate of all residential, commercial, industrial, public utility, vacant land, and special purpose properties.

The sales analyses shall include, at a minimum, sales ratios and coefficients of variance and dispersion. All sales that are part of the sales analyses shall be verified. A sales-assessment analysis with these same factors and measures shall also be done for all sales in a class and in each residential neighborhood. All sales that are a part of the sales analyses shall be verified. Tyler shall provide effective screening, confirmation of sales prices and inspection of sale property. Any additional requests for sales analyses by the Lister/Assessor shall also be performed.

A number of statistical tests that can be performed on the database once the data has been collected. The following reports are just a few that would be helpful in ensuring the accuracy of the Town's project.

- Calculation of appraisal to sale median and coefficient of dispersion Town-wide and by neighborhood, property class, value, style, age (year built), and building size.
- Calculation of the price related differential by class, Town-wide, and other strata.
- Printouts of selected parcel data and comparison criteria to ensure uniformity.
- Other reports as requested by the Lister/Assessor or required by the State.

## Depreciation

The age life method considers how long a property will be considered economically viable, or the economic "life" of a property. Depreciation on a parcel level is based on multiple data elements which consider the age of the building, the structure and construction type of the building, and the observed condition and utility. The structure and construction type will form the basis of the expected life, and the observed physical and functional condition ratings will estimate the percentage of depreciation to determine the value of the building in its current condition.

Depreciation is defined by the IAAO as:

*"Loss in value of an object, relative to its replacement cost new, reproduction cost new, or original cost, whatever the cause of the loss in value."*

Basically, depreciation is loss in value due to any cause. The three types of simple depreciation are:

### 1. Physical Depreciation

Physical depreciation is defined by the IAAO as "arising solely from a lowered physical condition of the property or a shortened life span as the result of ordinary use, abuse, and action of the elements." In general, physical depreciation is due to deterioration or "wear and tear" over time.

### 2. Functional Depreciation (or Functional Obsolescence)

Functional Obsolescence is defined by the IAAO as: "A decrease in the value of a property occasioned solely by shifts in demand from properties of this type to other types of property and/or to personal services." In general, functional depreciation is due to the loss of a building's ability to function as efficiently as a modern building (an old-style heating system versus a modern HVAC system).

### 3. Economic Depreciation

Economic depreciation is defined by the IAAO as: (1) "Depreciation due either (a) to an increase in supply of the property under consideration or (b) to a reduction in monetary demand for properties of the type under consideration unaccompanied by shifts in demand from such properties to other properties and/or personal services (preferred). (2) Depreciation of any sort other than physical depreciation." Economic depreciation is due to factors outside the property. The location of the property may also be a cause of economic depreciation.

## Depreciation Schedules

Depreciation schedules (or methods to be used in determining the amount of depreciation) shall reflect the normal and accepted depreciation rates of buildings according to classification. These schedules or methods shall cover residential, commercial, industrial, farm buildings and special use buildings and shall be approved by the Lister/Assessor.

Tyler shall develop and explain separately each depreciation on the property record card and/or worksheet if used. Land values shall be added to the depreciated improvement value. Compare the depreciated replacement cost of each property with the value produced via income analysis, or sales comparison, and develop obsolescence guides by type of property and location. Analysis should be reviewed with the Lister/Assessor and a copy shall be provided at the completion of the project.

## Building Cost Schedules

Tyler shall prepare for usage in the project including in the CAMA System, as hereinafter specified, building cost schedules. These schedules will reflect the unit-in-place method based upon the square foot or cubic foot area of buildings as applicable. These schedules shall be used in computing the replacement cost in the Town for all residential, commercial, industrial, and farm construction. They shall reflect the wage scale for the various trades, labor efficiencies, overhead, profit, engineer and architect fees and all other direct and indirect costs of construction. Before final acceptance they shall be proven by testing against known sales. All finalized schedules shall be approved by the Lister/Assessor before adoption and usage by Tyler.

The cost schedules shall be supported by a recognized valuation publication company such as Marshall and Swift, Means, etc.

### Residential

Residential cost schedules shall include schedules for various classifications, types, models, and story heights on a cost per square foot basis, normally associated with residential buildings. The schedule shall be flexible with special sections reflecting the various additions and deductions for construction components from the base specifications, along with prices for different types of heating systems, bathrooms, porches, breezeways, attached or detached, basement garages, and finished basements and schedules for other building improvements usually found on residential property including, but not limited to, in-ground swimming pools, barns, sheds, tennis courts, gazebos, and hot tubs.

### Commercial

Commercial building cost schedules shall be prepared in unit costs of material in place and charted on a per square foot basis and shall be prepared for various story heights and contain all the additions and deductions for construction components from base specifications.

### Industrial and Special Purpose

Cost schedules for industrial and special purpose structures shall be prepared in unit costs of material in place and charted on a per square foot basis and shall contain all the additions and deductions for construction components from base specifications.

### Farm

Cost schedules for farm structures shall be prepared for square foot and cubic foot costs for various types of farm buildings including, but not limited to, barns, sheds, silos, milk houses, coops, etc.

## Schedules for Town

Tyler shall supply and leave for the Town copies of building cost schedules and depreciation schedules. Appraisal schedules are all tables, factors, models, and model descriptions, which were employed in the project to process value estimates as required. These schedules shall be the same schedules used in the CAMA system and shall be turned over to the Lister/Assessor.

## Final Value Review Phase

After tentative appraisals have been made for each parcel, Tyler will make a final review of all property appraised. This review is to ensure uniformity in the assessments of various properties and to eliminate any errors that may have been made.

### Residential

After the creation of market values, Tyler will appraise each property. This review will be made property-by-property to eliminate errors in data entry, judgment, and computations that might have occurred. The mass appraiser will conduct the final review in an office using a computer loaded with digital imagery, current CAMA data, and initial value estimates showing both a predicted cost and market value. The mass appraiser determines that the structures have been accurately described and valued to assure the use of the proper schedules for computing replacement cost new; shall make a judgment as to the grade of construction and depreciation of each structure; shall consider indicated value of the structure and indicated value of the land against sales information concerning comparable properties and shall decide on the judgmental factors which affect the estimated value.

### Commercial, Industrial, Utility & Exempt

Tyler shall review the value estimates, verify observable data, adjust the value estimates for any changes, choose the final valuation methodology reconciling the cost and income approaches and ensure that like properties are appraised equitably. Tyler will appraise all utility and exempt properties in the same manner as other industrial properties.

### Final Review

Tyler will collect, record, and analyze general supporting data to serve as a basis for the development of guidelines for cost, market and economic coefficients needed when applying the three (3) approaches to value. The general supporting data to be analyzed will include cost data, lease data, economic data, and sales data.

The guidelines that will be developed from this analyzed data will include replacement cost schedules, depreciation schedules, economic rent schedules, income capitalization rates, comparative property sale units, unit land values, and gross income multipliers.

Tyler shall prepare a report and deliver it to the Lister/Assessor for approval showing the results of this comprehensive analysis. It shall contain a set of recommendations, including a proposed pricing schedule prepared by Tyler and encoded by Tyler based upon existing tables in the CAMA system. The pricing schedule will be based on a Tax Lien Date and will be approved by the Lister/Assessor prior to determination of final values.

### Conduct of Tyler

As a condition of the contract, Tyler's employees shall, at all times, treat the residents, employees, and taxpayers of the Town with respect and courtesy. Tyler shall take appropriate and meaningful disciplinary measures against those who violate the terms of this provision.



## Quality Control Checks

Tyler shall develop Quality Control checks and balances and share the QC plan with the Lister/Assessor at the beginning of the reappraisal.

Tyler understands that an error, no matter the significance, may cause an opinion of no faith. Therefore, Tyler shall develop a system of quality control to ensure the highest degree of accuracy before, during, and after field inspections.

Within four (4) weeks of the start of data collection and on a weekly basis thereafter, Tyler shall submit to the Lister/Assessor reports generated through the CAMA systems for review. These reports shall show all manner of information collected by data collectors, including sketches, whether there was an interior inspection or not, and outbuilding information. These reports will be reviewed by Tyler for quality control prior to their submission to the Lister/Assessor.

- a. The Lister/Assessor's office may spot check, properties picked at random, against the Town's existing record cards, or in the field. Any property found to have one or more of the following discrepancies shall be verified, either by the Lister/Assessor, Tyler, or both at no additional cost to the Town. This includes:
  - any structure or addition whose dimensions differ by two (2) feet or more,
  - any omitted structures,
  - any omitted additions,
  - any addition whose description differs (e.g., existing records show a wood deck, and the new listing shows an enclosed porch),
  - any property inspected by Tyler whose listing lacks features (e.g., fireplaces, finished basement, bathrooms), currently listed on the existing records.
- b. The listing of any property discrepancies shall be verified by re-inspection if necessary. Tyler shall notify the Lister/Assessor, in writing, of each reported discrepancy and the action taken by Tyler e.g.; corrects inaccurate information, or no change, and reason.

## Defense of Values

Tyler shall be present for Property Tax appeals stemming from the new valuation determined during the reappraisal.

## Assessment Notices

After the field review is completed, a notice subject to prior approval by the Lister/Assessor, shall be sent, at Tyler's expense by first class mail, to each property owner of record, setting forth the fair market value that has been placed upon the property identified in the notice (including any value placed upon Farmland, Forest Land or Open Space Land). The notice shall also be provided in a PDF file or similar form as approved by the Lister/Assessor. Tyler will also provide the needed information for the notice. Also enclosed with such notice shall be information specifying the dates, times and places of the informal public hearings and information describing the property owner's right to appeal the valuation of his property, including the manner in which an appeal may be filed with the Board of Assessment Appeals. Such notices shall be subject to approval by the Lister/Assessor and in accordance with State General Statutes.

At the time assessment notices are mailed Tyler shall provide reports of every assessment, one report to be sorted by name and the other report to be sorted by property location. Additional sets of these reports shall be made available at selected public buildings.

Tyler will have an informal discussion with the owner or agent who requests the same during the specified period at a location provided by the Town. Tyler will be responsible for all informal reviews filed as a direct result of this reappraisal which are requested within the timeframe scheduled for setting appointments. Any changes made to property valuations as a result of the informal review and reconciliation process will be reflected in the notice of final value.

## Informal Public Meeting

Tyler shall hold informal meetings, at such times and at such locations as the Lister/Assessor may specify, so that owners of property or legal representatives of owners, may appear at appointed times to discuss with qualified members of the Tyler staff, the assessed valuations of their property. Tyler personnel shall explain the manner and methods of arriving at value. Informal hearings, at the discretion of the Lister/Assessor, may be held on weeknights and Saturdays as well as during business hours.

Once the notices are mailed, Tyler shall provide sufficient full-time personnel for the sole purpose of making appointments for the informal hearings. Tyler shall maintain a (national) toll free line for the purpose of making appointments for the informal hearing. Tyler, in conjunction with recommendations of the Lister/Assessor, shall schedule a sufficient number of hearings and provide sufficient qualified personnel certified by the State of Vermont and approved by the Lister/Assessor to handle said hearings expeditiously and fairly. Tyler shall schedule a sufficient number of face-to-face or telephone hearings in order to expeditiously and fairly manage all taxpayer inquiries as they pertain to the assessment of their property. Any Information offered by the taxpayer shall be given consideration and any adjustments, included but not limited to re-inspection of the property, will be completed in a timely manner. Tyler will be responsible for the review, reconciliation, input, and reporting of the hearings to the Assessor.

Commercial, industrial, and public utility hearings shall be scheduled separately from residential hearings.

Tyler shall require each person(s) or their legal representative who appears at a hearing, to sign a form indicating whether Tyler shall re-inspect the property/properties being discussed, such decision to re-inspect to be at the reasonable discretion of the Lister/Assessor. This form shall be approved by the Lister/Assessor and provided by Tyler. The completed and signed forms shall be turned over to the Lister/Assessor at the conclusion of the hearings.

All decisions governing the format, method of public hearing, hearing date and times, time increments of appointments, number of personnel or specialists for the hearings, and the forms for said hearings, are subject to the approval of the Lister/Assessor.

After the hearings, Tyler shall be responsible for sending a notice to each taxpayer, or his or her representative, who appeared at a hearing seeking a review of the assessment. The informal hearing determination notices will be completed and mailed, such notice shall include: the adjusted assessment or a statement that no change is warranted. and the computer file updated for all final values as they appear on the property record cards.

Tyler will provide, at a minimum, the following information to the Town at the conclusion of the hearings:

- Total number of informal hearings
- Number of questions/problems resolved without changes
- Number of hearings requiring subsequent field review
- Number of value changes by property type
- Number and type of properties changing >10% after an informal hearing

### Litigation Support

Tyler will, upon request, participate in all appeals to the courts taken and processed in accordance with administrative or statutory procedures from any individual assessment or group action. This could include a challenge in general to the methodology or procedures used by Tyler in the reappraisal, which is computed from Tyler's appraised value provided that the first stage of the appeal has commenced within the time allowed. The Town will give Tyler copies of all documents involved in any complaint or appeal, prior notice to permit scheduling and travel to any conference or hearings at which Tyler's representative is requested to be present, and prompt notice of the cancellation or postponement of the same.

These services would be provided on negotiated terms.

### Board of Civil Authority Appeals

Tyler, upon request, will support the Assessment Department regarding formal appeals as a result of the reappraisal project. Tyler shall have qualified personnel available upon request for attendance at any deliberations of the Board of Tax Review held after the completion of this project, Sundays excluded, to assist in the settlement of complaints and to explain the valuations made.

These services would be provided at per diem rates.

## Mass Appraisal Report

A mass appraisal report will be provided to the Lister/Assessor as a summary of the work performed during the reappraisal project. This report is intended to complement, but not replace, the supporting materials that will be provided to the Lister/Assessor in the form of interim reports, quality audit reports, and appendices, as well as procedural and training materials throughout the project.

This summary report will serve to define, summarize, and document the standards followed and the process associated with the data verification, value review, analysis and reporting necessary to render a credible opinion of true value(s) in accordance with Vermont Statutes, IAAO technical standards and "Standard 6" of the Uniform Standards of Professional Appraisal Practices.

Additionally, Tyler will be responsible for the proper completion of the assessment rolls.

## Deliverables

Tyler shall provide the Town the following deliverables from the project:

- A final computer-generated property record card and CAMA cost sheet for each parcel file, and for each dwelling/residence on that parcel.
- Digital photos attached for each property record uploaded to CAMA.
- A copy of the updated Grand List.
- Change of Assessment Notices to property owners. Subject to overall timeline of the project/Tyler availability.
- Updates to the appraisal software database that reflects the new land schedules and updated cost.
- Income and market models and the successful completion of any appeals through the Board of Civil Authority.
- The documentation produced for this project shall include a new land valuation manual that includes neighborhood descriptions, land schedules and description of adjustments, a copy of the sales file and adjustments made to create the land schedule, copies of any other manuals, tables or reference materials developed or used during this reappraisal project.

## Public Relations Program

Public relations, information, and participation are crucial elements in a successful reappraisal. Tyler supports an extensive public information effort by collaborating with you. We will establish open and responsive communication with your taxpayers and provide informative materials that are easy to read and understand. Tyler's employees shall, at all times, treat the residents, employees and taxpayers of the Town with respect and courtesy.

The parties of this reappraisal recognize that a good public relations program needs to be planned and completed from the beginning of the project in order to inform the public as to the purpose, benefits, and procedures of the reappraisal.

Tyler shall provide reasonable assistance to the Lister/Assessor in conducting a program of public information through the press and other media, such as meeting with citizens, civic clubs, HOAs, and property owner groups as a means of establishing understanding and support for the reappraisal and sound assessment administration. Tyler shall supply visual aids and other media at its disposal to this end. All public releases shall be approved by the Lister/Assessor prior to release. This program will commence prior to the data collection effort and continue on a regular basis for the duration of the project.

The objective of the public information effort is to communicate with the public throughout the reappraisal. We will educate property owners about the reasons for the reappraisal, the methods of valuation, and the benefits to the community. All materials and messages will reinforce that the law requires the reappraisal, that the reappraisal is being completed in a professional and objective way, and that the goal is fairness and equity.

During the Public Relation program, Tyler shall, with the Lister/Assessor's approval and participation,

- Conduct a program of public information which may include direct mailings, handouts, interviews with the press (newspaper, radio, television, etc.), other electronic media, and the Town's website.
- Participate in meetings with citizens, public officials, and other stakeholders as necessary during all phases of the reappraisal.
- Agree on which public relation efforts are most effective, necessary, and reasonable. The Lister/Assessor, prior to release, shall approve all public information releases.
- Engage in public relations efforts at the commencement of the reappraisal, during the data collection and inspection phases of the project, and at the conclusion of the reappraisal.

With the participation and approval of the Lister/Assessor, individual presentations shall be directed to taxpayers, local officials, business, and civic groups so that they may better understand the scope and objectives of the project. This campaign shall continue on a regular basis throughout the duration of the project.

At a minimum, the following points shall be addressed:

- Significance of the property tax
- Necessity of the project
- Purpose and methods of project equity
- Role of city/town/village
- Role of contractor
- Role of Lister/Assessor
- Role of Appraisal and Imaging technology
- Necessity of data collectors
- Caliber and training of data collectors
- Need for data quality control

Cooperation of the parcel owners is the key to success. The cost for any news releases shall be the responsibility of Tyler Technologies. The format and content of such releases shall be approved by the Lister/Assessor. The public relations program will remain flexible to provide sufficient information to promote and ensure public understanding. The effectiveness of the public relations program shall depend on flexibility since the success of the program can only be measured by interaction with and response from the public which is being addressed. At the request of the Lister/Assessor, Tyler shall appear before all municipal public hearings of municipal bodies called to consider questions arising from or related to the Project.

Examples of our Public Relations program can be found on the following websites.

- <https://empower.tylertech.com/Sussex-County-Delaware.html>
- <https://empower.tylertech.com/rs/015-NUU-525/images/kent-county-faq.pdf>
- <https://empower.tylertech.com/kent-County-Delaware.html>
- <https://empower.tylertech.com/Lewiston-Maine.html>

## Project Schedule

The following details Tyler's itemized project schedule.

Dates are subject to discussion and review at the time of contract negotiations unless otherwise mutually agreed upon modifications. Tyler will complete the preliminary and final grand lists in accordance with state guidelines and requirements.

TYLER PROPOSAL SCHEDULE ITEMIZED	BEGIN DATE	END DATE
Town Advertised RFP	8/8/2024	
Tyler Technologies Proposal	8/23/2024	
Town Opens Bids	9/19/2024	
Execution of Contract(s)	9/30/2024	
Provide Performance Bond, if requested		
Project Management	3/15/2026	
Project Start-up (Data Conversion to CAMA)	4/1/2026	
Documentation	10/30/2026	8/30/2027
Public Relations Plan	7/30/2026	11/30/2026
Preliminary Valuation Modeling Decision & Design	8/30/2026	2/20/2026
Property Record Card Design	8/1/2026	8/20/2026
Data Mailer Design	8/1/2026	8/20/2026
Income & Expense Form Design	8/1/2026	8/20/2026
Printing & Mailing of Data Mailers (1 run)	8/20/2026	9/20/2026
Data Mailers Processing (1 run)	9/20/2026	12/20/2026
Data Entry	8/1/2026	11/20/2026
Measurement Verification of Sketch Errors	8/1/2026	12/30/2026
Sales Analysis & Verification	7/1/2026	12/30/2026
Inspection of Sales	8/1/2026	12/30/2026
Neighborhood Delineation	8/1/2026	12/30/2026
Land Unit Value Tables	8/1/2026	11/1/2026
Quality Control	9/3/2026	4/1/2026
Comm./Ind./Exempt Data Collection	8/1/2026	12/30/2026
Residential Data Collection	8/1/2026	12/30/2026
Callback Appointment Process	11/15/2026	2/1/2027
Cost & Depreciation Schedules	10/1/2027	2/1/2027
Review	2/1/2027	3/1/2027
Tyler Informal Hearing	3/1/2027	3/7/2027
Informal Value Resolutions	4/7/2027	4/15/2027
Grand List (preliminary)	4/15/2027	5/15/2027
Reappraisal Notices Mailed	4/15/2027	5/1/2027
Assessor/Listener Hearings	5/15/2027	6/15/2027
Assessor/Listener files final Grand List	7/1/2027	

## Tyler Experience & References

### History of CAMA

Over the past 40 years CAMA software function among many vendors have become very similar. Variable development, pricing tables and query ability have become readily available. At one time, reappraisal vendors were chosen for reappraisal based solely on the installed use of proprietary CAMA software. This was because CAMA products were in their infancy and access to programming source code was essential to even using the software. Over the past 20 years as CAMA software became generic, reappraisal vendors conducted successful reappraisal on software they never developed or supported. In essence, access to programming source code became irrelevant to completing a reappraisal. In fact, many reappraisal consultants successfully complete reappraisals without owning software of their own or even having programmers on staff. Reappraisal consultants rely now on the ongoing support agreement municipalities have with their CAMA vendor.

**The heart, essence and success of a reappraisal is appraisal expertise not the exclusive use or ownership of CAMA software.** John Valente, Tyler, and our employees have conducted successful reappraisals on over 10 different CAMA packages not owned or supported by either John Valente or Tyler Technologies. Tyler Technologies is the largest reappraisal company in the world and maintains an extensive staff of over 100 programmers and analysts who have expertise in all varieties of software languages, including SQL, and various operating systems.

For the reasons cited above John Valente, Tyler Technologies and our employees have the expertise, commitment, and experience to conduct an exceptional reappraisal for the Town of Bristol, Vermont.

### Tyler Competency Using MicroSolve CAMA and GIS Data during the Reappraisal

Tyler's New England staff has extensive experience successfully completing projects using MicroSolve CAMA software. Each proposed staff member has not only experience on the system, but an in-depth knowledge of the valuation algorithms employed to calculate all three approaches to value. We do our work on-site, under the Town's existing license and within the live database using the Sales Analysis functionality of the MicroSolve system. Since Tyler operates under the existing license, there is no cost to the Town beyond the annual support agreement and website costs the Town already incurs.



GIS and the data it contains is an invaluable tool for appraisers, especially when it is integrated into the CAMA system where it can be used to not only display data, but to allow mass changes based on specific criteria. Some of the ways Tyler staff have used GIS on past projects include:

1. Thematic maps – Maps that display CAMA data – often displayed in ranges:
  - % Change range
  - ASR range
  - Sale prices
  - Base price of land (for consistency without size curve)
  - Neighborhoods
  - Grades (consistency in subdivisions)
  - Influence factors (along RR tracks, waterfront, etc.)
2. Data behind the layers – Each layer has a unique key (parcel ID typically) and data related to that parcel. That data can be extracted, analyzed, or loaded into the MicroSolve database.
  - Parcel layer allows us to compare acreage size in GIS to what is in MicroSolve
  - Zoning layer allows us to compare to the zone in MicroSolve
  - Water/Sewer layer allows us to determine if a property has public utilities.
3. With an expert user – While Tyler’s staff is able to create thematic maps, we are not expert GIS users. With assistance, we have been able to:
  - Calculate the linear feet of waterfront for use in valuation
  - Categorize waterfront using depth maps
  - Categorize land based on slope from contour maps (large parcels)
  - Estimate the number of wetlands for each parcel.

## Current Vermont Reappraisal Contracts

The list of the reappraisal contracts that Tyler is currently committed to is as follows:

- Hartford, VT complete 7/1/2025
- St Albans, VT complete 7/1/2025
- Castleton, VT complete 7/1/2025
- Pawlet, VT complete 7/1/2026
- Proctor, VT complete 7/1/2026
- Chittenden, VT complete 7/1/2026
- Bakersfield, VT complete 7/1/2026
- Shelburne, VT complete 7/1/2027
- Ferrisburgh, VT complete 7/1/2026
- Shrewsbury, VT complete 7/1/2027

## Recommendation Letters

The following pages contain recommendation letters from various Assessors throughout the Northeast validating John Valente and Tyler Technologies’ commitment to excellence.

TOWN OF DARIEN  
ASSESSOR'S OFFICE  
TOWN HALL, 2 RENSHAW ROAD  
DARIEN, CT 06820-5397  
TELEPHONE: (203) 656-7310



ANTHONY J. HOMICKI, CCMA II  
ASSESSOR

February 28, 2024

Re: Recommendation for Tyler Technologies Inc., John Valente Northeast Regional Manager

I have known John Valente both personally and professionally for over 30 years and cannot say enough about his integrity and work ethic. Some of the first workshops that I attended 40+ years ago were presented by John giving special focus on detail needed to value and then assess real estate. He is one outstanding person both professionally and personally a great appraiser and a great teacher. His partnership with the Team Tyler makes them stand above all others.

I started my carrier in the late 70's as part of a team updating assessments for the City of Hartford. It was a period of time when John Valente gave training sessions enforcing the fact that accuracy was in the detail of each real estate transaction. Since then I have implemented 14 revaluations all-knowing integrity of the detail will yield excellent results as is etched in my work ethic and enforced by John Valente.

As the Darien Assessor, I have implemented five revaluations over a period of 20 years with the assistance of Tyler Technologies. Each reval was delivered with competence meeting performance standards required by the state. Each reval was finished on time; had successful informal informational hearing sessions; had reasonable numbers of formal hearings before my Board of Assessment Appeals; and all resulting with a nominal level of litigation. I am proud to say that this Tyler Team of John, Drew and Salim with their field appraisers and technical team completed our 10-1-2023 mass appraisal ahead of schedule. The average house in Darien has had a 29% increase in value going from \$1.6 million to over \$2.2 million. The intimate analysis performed by Team Tyler of our income and expense data in concert with over 600 valid sales gives me full confidence of the detail of each of my 7,122 residential and commercial parcels. Just as important is that the Tyler Technologies team has elevated the credentials here in this Darien Assessor's office with us having three certified CCMA's. We have learned from Team Tyler.

Our Darien tax base is well defined. Our Darien tax base is well defended. I thank Team Tyler for all that they have delivered. I welcome questions or concerns that you might have in regards to the mass appraisal effort by the wide array of appraisal technicians employed by Tyler Technologies. They are the best.

Respectfully,  
Anthony J. Homicki CCMA II



CITY OF NORWALK  
Bill O'Brien, MAI, CCMA  
Assistant Assessor  
wobrien1@norwalkct.org  
203-854-7887  
125 East Avenue, PO BOX 5125  
Norwalk, CT 06851-5125

May 17, 2019

To Whom It May Concern:

I have had the very great privilege of knowing John Valente for quite some time in his professional capacity as a real estate appraiser and certified revaluation technician. I initially met John in a formal business setting while Assistant Assessor for Norwalk, Connecticut, and worked closely with him during the 2018 Norwalk Revaluation Project. I can assert without hesitation or equivocation that he is among the finest and most capable people I have been fortunate enough to know. John possesses and exhibits the highest ideals in personal integrity and is an energetic and industrious individual capable of managing and completing any task in the most competent and timely manner.

Through his interaction with others while working with me and others on my staff, John's positive personality and superior professional skills have provided him with a well-respected reputation. His interpersonal skills are manifest in his excellent verbal and non-verbal communication abilities and technical expertise. Also importantly, others who have come in contact with him remark about his outstanding interpersonal skills and professional and technical abilities. I have had occasion to share public speaking events and business meetings with him at various times and can attest to his excellent communication skills.

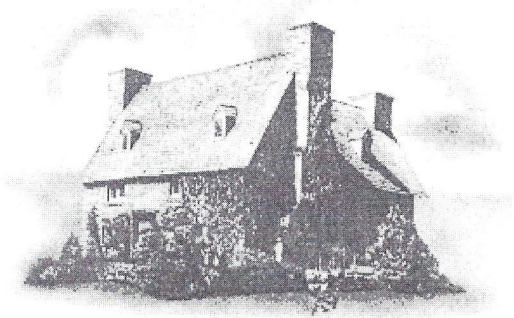
I have personally witnessed his interaction with a variety of individuals from various business and technical backgrounds. His ability to interact positively with people of all types is commendable and enviable, his enjoyment of others is apparent, and his respect and concern for people is admirable. I consider him a role model for others.

His direct work with me typically involved a wide variety of extremely complex and often complicated valuation problem solving and other tasks and duties, including creating and managing electronic data files, spreadsheets, cost/benefit analyses, valuation and revenue review, and other related assignments. John and I were frequently called upon to interact with high-profile accounts and to simultaneously manage multiple problem-solving tasks which he handled with ease, enthusiasm and efficiency. John is reliable and possesses the highest ethical and professional standards.

I can fully and enthusiastically endorse John for any position, assignment or endeavor whatsoever, without the slightest doubt that he will bring to it knowledge, skills, and personal demeanor without equal. He is an individual of the absolute highest integrity and ideals, he is eminently qualified, highly motivated and he is a consummate professional.

If you require any additional information or personal contact, I will be more than happy to oblige. Please call anytime.

Bill O'Brien, MAI, CAMA



THE OLD STONE HOUSE

## TOWN OF GUILFORD

SETTLED IN 1639

ASSESSOR'S OFFICE  
31 PARK ST  
GUILFORD, CONNECTICUT 06437

TELEPHONE 203-453-8010  
FAX 203-453-8125

July 2, 2018

TO WHOM IT MAY CONCERN:

I have known John Valente for nearly thirty years.

During that time John has successfully completed a number of Town-wide revaluation projects and a specialized commercial-only valuation for the municipalities that have employed me as their Assessor.

John's work is exemplary. From the rock-solid foundation of his research, to the thorough analysis of that research, to the reconciliation of that research into supportable values, John has always timely delivered a very understandable and defensible product.

I consider myself very fortunate to have worked with and to have learned from such a talented professional.

I would, without hesitation, highly recommend John Valente for any valuation project that requires the best.

Respectfully,

Edmund A. Corapinski, C.C.M.A. II, C.C.A.  
Assessor

**STEDRONSKY & METER, LLC**  
Attorneys at Law  
62 WEST STREET, P.O. BOX 1529  
LITCHFIELD, CT 06759

H. JAMES STEDRONSKY  
hjs@stedlaw.com  
JONATHAN METER  
jjm@stedlaw.com  
Mary Houppert, Paralegal  
mfh@stedlaw.com

(860) 567-9111  
Fax (860) 567-1666

April 6, 2022

To whom it may concern.

Over the years, as an attorney, I've worked with numerous professionals in the field of municipal tax appeals, both those representing municipalities and those representing tax payers. John Valente is a standout respected by those on both sides of this fence.

Over the past several years I've worked with John on a number of difficult hospitality cases for a municipality. John's advice and valuations were always spot on. He has the ability to use common sense along with professional standards of valuation.

Of particular help was a model spreadsheet that John developed for pretrials. Without going into detail, it was the most helpful aid that I've used to settle cases. It even resulted with one well-known attorney withdrawing his case. All cases were settled favorably for our town.

John also participated with me in a seminar presented to the assessors of the entire state. John's presentation of a difficult subject was clear and entertaining. The presentation received many complements.

Most important is that John has his own proprietary method of mass-appraising commercial properties, which is quite accurate and holds up well when properties are put under the more intensive scrutiny of appeals. And he is an effective advocate for his work when put to the test in litigation.

Please free to call if you would like to discuss this very professional man.

Sincerely yours,

  
James Stedronsky

JS/mh





# The Town of Windsor Locks

Home of Bradley International Airport

Office of the Assessor

860)627-1448

April 4, 2022

To Whom It May Concern,

I have been asked to provide a professional reference for John Valente. In short, I would unreservedly recommend John for any position regarding assessment, revaluation, or appraisal services.

In the 5 years I have known him, he has been an excellent resource for assessment / appraisal knowledge, a colleague, and most importantly a mentor that I have grown to trust as a subject matter expert in his field. His expertise has been a great factor in my success as an Assessor and the success of Windsor Locks.

I met John in 2017 as he was instrumental in the revaluation for Windsor Locks. His appraisal skills are excellent and throughout the reval process he was critical to the successful outcome. From performing all of the commercial valuations, establishing residential values, and working through the appeal process his professionalism was prevalent. His knowledge, communication skills, and his ability to define and support his property values made the reval a much simpler process for the Assessor's Office and the public.

Since the reval process I have worked with John on a number of court cases and his ability to support the Town's value and his strong negotiation skills have allowed Windsor Locks to settle these cases at very favorable values. His years of experience have made him a formidable and credible source of testimony to the attorneys and judges. Our attorney that handled our most recent hotel cases was so impressed with John's style of presentation he has asked to duplicate it for his other clients. John has established a unique format for presenting value that clearly points out our favored value and establishes areas where the opposition's value needs to be inspected.

Windsor Locks has a contractual agreement with John and I routinely consult with Mr. Valente when I have valuation questions. He is always a source of guidance and a wealth of information. He is never rushed and always takes the time to answer the question thoroughly.

In closing, I would like to reiterate that I would highly recommend John Valente for your upcoming revaluation process. His professionalism is beyond reproach and his expertise, communication skills and demeanor make him the perfect candidate to conduct your revaluation process.

Sincerely,

John Creed CCMA I  
Town of Windsor Locks  
50 Church ST  
Windsor Locks, CT 06096



# CITY OF HARTFORD

ASSESSMENT DIVISION  
550 MAIN STREET  
HARTFORD, CONNECTICUT 06103  
TELEPHONE: (860) 757-9640  
FAX NO. (860) 722-6142



JOHN PHILIP, CCMA II  
CITY ASSESSOR

March 31, 2022

To Whom It May Concern:

I write to recommend John Valente and his team for commercial valuation work, particularly mass appraisal modeling and revaluation. John has conducted the commercial, industrial, apartment and tax exempt valuation for me here in Hartford in our last three revaluations, in 2011, 2016 and 2021. They were all very challenging and market conditions were all very different during each cycle, but John always had good solutions for difficult valuation problems regardless of the problems presented.

The 2021 revaluation was probably the most difficult of my career. I can only describe market conditions as bazaar. Residential and apartment properties rose considerably, while the big office towers dropped precipitously, setting up a significant shift in burden from large commercial properties to residences and apartments.

Our tax rate in Hartford is by far the highest in the state and that complicates capitalization rate selection because the capitalization rates achieved with many of our sales implied negative returns on equity. John adroitly modeled our complicated market and produced accurate, defensible values for all of our roughly 4,100.

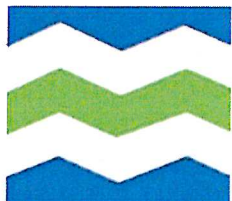
Market conditions did not pose our greatest problem during the 2021 revaluation, however. Software problems did. We discovered latent problems with both our data and the software itself very late in the game. John has a programmer on his payroll that is familiar with our software and with his extensive help, we were able to right the ship and John was able to remodel the city, review the values and hold informal reviews with taxpayers in time for me to finalize the annual assessment role. I don't believe that anybody else would have been able to get the job done. With any other revaluation contractor, I am sure I would have had to have told my mayor that I could not finish the revaluation and we would need to approach the state for some type of waiver.

John is an accomplished professional with a great team who has been a pleasure to work with.

Sincerely,

A handwritten signature in blue ink, appearing to read "John Philip".

John Philip, CCMA II  
City Assessor



## OFFICE OF THE ASSESSOR

City of Burlington

City Hall, 149 Church Street, Burlington, VT 05401

P (802) 865-7114 \* [www.burlingtonvt.gov/Assessor](http://www.burlingtonvt.gov/Assessor)

### Appreciation and Recommendation of Safeguard Organic Analytics Inc.

To whom it may concern,

In 2017, the deputy assessor and I began planning for the citywide reappraisal project. To be completed 2021. One goal was to appropriate resources into the valuation of commercial, industrial, and apartment valuations. These properties had the poorest equity of all property class types. Additionally, we needed a high level of expertise because the commercial types of properties included, marinas, apartments, student housing, hotels, retail center, and a power plant. Our expectation was to hire a reappraisal firm with solid commercial modeling, and valuation experienced whom could handle Burlington's multiple commercial property types. Another goal was to hire a reappraisal monitor whom would independently oversee what all parties were fulfilling the provisions of the Contract in a timely manner.

I reached out the John Valente because Mr. Valente provided commercial valuation assistance to the Burlington Assessor's office during the prior reappraisal project in 2005.

Safeguard Organic Analytics Inc. was able to conduct the monitoring as well as the valuations of the commercial properties in Burlington.

The job was especially challenging during the COVID19 pandemic. The residential market was experiencing unusual market appreciation, yet parts of the commercial market had significant valuation uncertainty. These factors added to the valuation challenges for SOA valuation team. COVID19 caused revaluation project delays. With John Valente's leadership, we were able to devise a plan to complete the project on schedule. This project would not have finished on time without SOA and my staff working together on final property valuation reviews.

I cannot thank SOA enough for their assistance with Board of Assessor property appeal hearings. Multiple commercial property owners have complemented to me of Mr. Valente's professional demeanor, and appraisal knowledge. These people expressed to me that SOA treated them with fairness and respect.

SOA Inc. has exceeded my expectations. I look forward to working with SOA Inc., again in the years to come.

Sincerely,

John Vickery

City Assessor  
Burlington, Vermont





# TOWN OF GROTON

## FINANCE DEPARTMENT ASSESSMENT

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Mary Gardner, CCMA II  
Assessor  
Mgardner@groton-ct.gov

45 Fort Hill Road, Groton, Connecticut 06340  
Telephone (860) 441-6660 Fax (860) 441-6678  
www.groton-ct.gov

March 2, 2022

Colleagues,

I am pleased to write a letter of recommendation for John Valente and his team on the successful outcome of the Groton 2021 Revaluation of Commercial Real Estate.

John's efforts to appropriately and fairly appraise the commercial, industrial, exempts and apartments were thoroughly researched and documented. The exchange of information and data throughout the project was met with a high level of professionalism, and my input on the current local markets were well received and professionally taken into consideration.

Final documentations and explanations of value were well written and supported the appraisal methods for mass appraisal. John's guidance on the overall scope of the project and his support in the public domain has been strong and well received by the assessment staff and town political bodies.

Overall, John and his team are competent and professional in the mass appraisal field. I would strongly recommend their participation and performance on future revaluations.

Kind regards,

Mary Gardner, CCMA II  
Assessor  
Groton, CT



**CITY OF PORTLAND**  
**Assessor's Office**  
**Christopher A. Huff, CMA**

November 1, 2021

RE: Recommendation Letter for Safeground Organic Analytics, Inc.

To Whom It May Concern:

Safeground Organic Analytics, Inc. was subcontracted by Tyler Technologies, CLT Appraisal Services to conduct the commercial property revaluation part of the 2021 City of Portland Revaluation Project. From Day 1 of this project, Safeground's project team of John Valente, Dan Ducharme, Drew Manlove and Cy Francis more than exceeded our expectations. It was truly a privilege and a pleasure to work with them.

Highlighting the strengths of this team starts with the Commercial Project Manager, John Valente. John was intimately involved in every step of the commercial revaluation project. From data analysis to income modeling to final review and appeal hearings, John's exceptional professional skills, knowledge and integrity were always on display. Second to these are John's exceptional presentation skills. He led several community presentations on the process and functions of valuing commercial properties. His presentation style along with his use of PowerPoint slides and training aides made for very informative sessions that balanced the right amount of pertinent market data with real-world application. These were delivered in just the right way to help the audience understand the tedious process of a revaluation, beginning to end. Finally, I have to comment regarding John's excellent communication skills. He was readily available whenever we needed him and always kept us up-to-date, informed and aware of the project data, status and next steps all while allowing us input and direction to the process.

The rest of the project team, Dan, Drew and Cy, performed their roles admirably. From data review to data entry, assisting on appeal hearings to preparing analysis and project documentation, we felt the team delivered on every benchmark in a professional and effective manner. We were impressed by the skillsets and tools used for maintaining and tracking data changes and property owner communications.

We would absolutely consider utilizing Safeground Organic Analytics, Inc. services in the future and can't recommend them enough for your project. You would be well served by making the decision to bring them on-board and you can expect a successful project outcome for having done so.

Please feel free to contact me for any additional information at (207) 874-8754.



**CITY OF PORTLAND**  
**Assessor's Office**  
**Christopher A. Huff, CMA**

Sincerely,

*Christopher A. Huff*

Christopher A. Huff, CMA  
City Tax Assessor

## Tyler Northeastern Appraisal Services Client List

Client	Parcel Count	Project Type	Contact Person	Address	Phone Number
<b>Connecticut</b>					
Town of Bethel	7,398	Revaluation Update 10/01/2022	Elizabeth Hirt, Assessor	1 School Street Bethel, CT 06801	203.794.8507
Town of Darien	7,058	Ongoing Appraisal Support Revaluation 10/1/2023	Anthony Homicki, Assessor	2 Renshaw Drive Darien, CT	203.656.7310
Town of Durham	2986	2020 Reappraisal	George Eames, First Selectman	30 Townhouse Rd Durham, CT 06422	860.349.3452
Town of Farmington	11,112	Statistical Revaluation 10/01/2022	David Gardner, Town Assessor	1 Monteith Drive Farmington, CT 06032	860.675.2370
Town of Franklin	1,101	Full Revaluation 10/1/18 List	Kimberly Bechard Assessor	7 Meetinghouse Hill Rd Franklin, CT 06254	860.642.6475
Town of Greenwich	22,359	Ongoing Appraisal Support 10/01/2020	Lauren Elliott, Esq, Assessor	101 Field Point Road Greenwich, CT 06830	203.622.7885
Town of Groton	13,000	Full Revaluation 10/1/2021 List	Mary Gardner, Assessor	45 Fort Hill Road Groton, CT 06340	860.441.6660
City of Hartford	27,332	Full Revaluation 10/1/21	John S. Philip, City Assessor	550 Main St Hartford, CT 06103	860.757.9640
Town of Killingly	6,000	Revaluation 10/1/2023	Kathleen Thornton, Assessor	172 Main Street Killingly, CT 06239	860.779.5324
City of Norwalk	28,460	Full Revaluation 10/1/19	Paul Gorman, Assessor	125 East Avenue Norwalk, CT 06856	203.854.7941
Town of Plainville	7,152	Full Revaluation 10/1/2021	Sarah Carey, Supervisor of Assessment & Collection	1 Central Square Plainville, CT 06062	860.793.0221
Town of Portland	4,528	Full Revaluation 10/1/2021	Richard J. Lasky Jr., Assessor	33 East Main St. Portland, CT 06480	860-342-6744
Town of Putnam	3,867	Ongoing Appraisal Support Full Revaluation 10/1/19	Susan Ramos, Assessor	126 Church Street Putnam, CT 06260	860-963-6802
Town of Rocky Hill	7,524	Full Revaluation 10/1/19	Stuart Topliff, Assessor	761 Old Main Street Rocky Hill, CT 06067	860-258-2722
Town of Thomaston	3,340	Full Revaluation 10/1/2021	Robert Dudek	158 Main Street Thomaston, CT 06787	860-283-0305
Town of Windsor Locks	12,498	Ongoing Appraisal Support Full Revaluation 10/01/2018	John Creed, Assessor	50 Church Street Windsor Locks, CT 06096	860-627-1448

Client	Parcel Count	Project Type	Contact Person	Address	Phone Number
<b>Delaware</b>					
City of Dover	13, 158	2020 Revaluation Ongoing Appraisal Support	Annette Hart Assessing Clerk	5 East Reed St. Dover, DE 19903	302.736.7022
City of Milford	4,167	Ongoing Appraisal Support	Debbie Johnson, Supervisor	201 S. Walnut Street Milford, DE 19963	302.424.3712
Kent County	88,497	2024 Reassessment	Cheryl Bundek Assessment Supervisor	555 South Bay Rd. Dover, DE 19901	302.744.2401
New Castle County	212,047	2025 Reassessment	Denzil Hardman Assessor	87 Reads Way New Castle, DE 19720	302.395.5520
Town of Smyrna	3,000	Ongoing Appraisal Support	Sheldon Hudson, Town Manager	27 South Market Street Smyrna, DE 19977	302.653.9231
Sussex County	169,035	2025 Reassessment	Gina Jennings, Finance Director	2 The Cir Georgetown, DE 19947	302.855.7824
<b>Maine</b>					
City of Portland	22,500	Full Revaluation 2020	Joe Montefusco, Assistant Assessor	389 Congress St. Portland, ME 04101	207.874.8486
<b>Massachusetts</b>					
Town of Ashland	5,000	Appraisal Consulting	Richard Ball, Director of Assessing	101 Main Street Ashland, MA 01721	508.881.0100
City of Brockton	27,173	FY23 Interim Update	John P. O'Donnell, Acting Chairman, BOA	45 School Street Brockton, MA 02301	508.580.7191
Town of Holliston	8,000	Appraisal Consulting	Kevin Rudden	703 Washington St. Holliston, MA 01746	508.429.0604
Town of Needham	10,799	Appraisal Consulting	Melissa Motta, Director of Assessing	Town Hall 1471 Highland Avenue Needham, MA 02492	781.455.7500
City of Northampton	14,300	FY23 Interim Update	Marc Dautreuil, Principal Assessor	212 Main Street Northampton, MA 01060	413.587.1200
City of Peabody	15,250	Provide permits, as requested	Susan Antonellis, City Assessor	City Hall, 24 Lowell Street Peabody, MA 01960	978.538.5727
City of Pittsfield	17,527	FY23 Certification	Paula J. King, Chairperson, BOA	City Hall, 70 Allen Street Pittsfield, MA 01201	413.395.0102
Town of Seekonk	4,000	Appraisal Consulting	Shawn Cadime, Town Administrator	100 Peck Street Seekonk, MA 02771	508.336.2911
Town of Somerset	7,500	Appraisal Consulting	Pamela M. Lee, Principal Assessor	140 Wood Street Somerset, MA 02726	508.646.2824
City of Springfield	42,000	FY23 Certification	Patrick Greenhalgh, Assessor Chairman	City Hall, 36 Court St t Springfield, MA 01103	413.736.3111

Client	Parcel Count	Project Type	Contact Person	Address	Phone Number
<b>New Jersey</b>					
East Orange	10,807	2022 Revaluation	Lisa Jackson, Purchasing Agent	44 City Hall Plaza East Orange, NJ 07018	973.266.5100
<b>New York</b>					
Town of Cornwall	4,900	2017 Reassessment	Kitty Fiorello, Assessor	183 Main Street Cornwall, NY 12518	845.534.7290
Town of Greenburgh	29,128	2021 Reassessment Services	Edye McCarthy, Assessor	177 Hillside Avenue Greenburgh, NY 10607	914.989.1520
Town of North Salem	1,552	Reassessment Services	Karen Futia, Assessor	266 Titicus Road North Salem, NY 10560	914.862.5334
Town of Ossining	10,176	2020 Reassessment Services	Michael Fouassier, Assessor	16 Croton Avenue Ossining, NY 10562	914.762.8274
Town of Rhinebeck	3,833	2020 Reassessment	Jennifer Mund, Appointed Assessor	80 East Market Street Rhinebeck, New York 12572	845.876.4805
Town of Rye	11,200	2023 Reassessment	Gordon Casement, Acting-Assessor	222 Grace Church Street, Ste. 303 Port Chester, NY 10573	914.939.3566
Town of Southampton	58,254	Ongoing Appraisal Support	Lisa Goree, Assessor	116 Hampton Road Southampton, NY	631.283.6020
<b>Pennsylvania</b>					
Beaver County	93,628	2020 Reassessment	Joshua Eckelberger Chief Assessor	810 Third Street Beaver, PA	724.770.4480
Delaware County	200,000	2019 Reassessment	Mario Civera Jr., Chairman	201 West Front Street Media, PA 19063	610.891.4250
Lackawanna County	105,086	2022 Reassessment	Tim Booth Chief Assessor	123 Wyoming Ave Scranton, PA 18503	570.963.6728
Wayne County	62,000	2022 Reassessment	John McCormick, Chief Assessor	925 Court Street Honesdale, PA 18431	570.253.5970
<b>Rhode Island</b>					
Narragansett	700	2018 Revaluation (Safeground)	Erin Jacobs, Tax Assessor	25 Fifth Ave. Narragansett, RI 02882	401.788.2555
Newport	10,000	2023 Statistical Reappraisal	Jade Phillips, Tax Assessor	43 Broadway Newport, RI 02840	401.845.5365
Providence	44,000	2015 Reassessment	David Quinn Assessor	25 Dorrance Street Providence, RI 02903	401.421.5900
Warwick	40,952	2015 Revaluation	Neal Dupuis, Tax Assessor	65 Centerville Road Warwick, RI 02886	401.738.2005
Woonsocket	700	2018 Revaluation (Safeground)	John Pagliarini ESQ, RICA, City Assessor	169 Main Street Woonsocket, RI 02895	401.767.9271

Client	Parcel Count	Project Type	Contact Person	Address	Phone Number
<b>Vermont</b>					
City of Burlington	10,836	2021 Reappraisal	John Vickery, Former City Assessor	149 Church Street Burlington, VT 05401	802.865.7114
City of South Burlington	7,525	2021 Reappraisal	R Todd LeBlanc, Assessor	575 Dorset Street South Burlington, VT 05403	802.846.4103
Town of Bakersfield	717	2026 Reappraisal	Joshua J. Goss, Selectboard Chair	P. O. Box 203 Bakersfield, VT 05441	802. 827.4495
Town of Castleton	2446	2025 Reappraisal	Mary Jo Teetor, Assessor	263 Route 30 North Bomoseen, VT 05732	802.468.5319
Town of Chittenden	730	2026 Reappraisal	Alyssa Reynolds, Assessor	260 Chittenden Road Chittenden, VT 05737	802.483.6647
Town of Hartford	5729	2025 Reappraisal	Richard Vincent Assessor	171 Bridge Street White River Junction, VT 05001-7034	802.468.5319
Town of Ferrisburgh	1557	2025 Reappraisal	Ferrisburgh Listers	3279 Route 7 Ferrisburgh, Vermont 05456	802.877.3429
Town of Pawlet	832	2026 Reappraisal	Lisa Wright, Assessor	45 Main Street Proctor, VT 05765	802.325.3309
Town of Proctor	768	2026 Reappraisal	Judy Frazier, Town Manager	45 Main Street Proctor, VT 05765	802.459.3333
Town of Shrewsbury	695	2026 Reappraisal	Shrewsbury Listers	9823 Cold River Road Shrewsbury, Vermont 05738	802.492.2009
Town of St. Albans	2322	2025 Reappraisal	Chip Sawyer, Assessor	100 North Main Street Saint Albans, VT 05478	802.524.7589

# FIVE YEAR CLIENT LIST



## Property & Recording

Client	Year	Type of Service
<b>Alabama</b>		
Alabama DOR	2024	Enterprise Assessment & Tax
<b>Alaska</b>		
Municipality of Anchorage	2020 2021, 2022, 2023, 2024	Enterprise Assessment & Tax, Landisc, MAS Enterprise Assessment & Tax
City & Borough of Juneau	2024	Enterprise Assessment
Ketchikan Gateway Borough	2020, 2021, 2022, 2023, 2024	Enterprise Assessment
Kodiak Island Borough	2023	Enterprise Assessment & Tax
Matanuska-Susitna Borough	2023	Enterprise Assessment & Tax
<b>Arizona</b>		
Apache County	2021, 2023 2022 2024	Records Management Assessment & Tax Plus, Records Management Assessment & Tax Plus
Coconino County	2023	Records Management
Gila County	2022, 2023, 2024	Records Management
Mohave County	2021, 2023	Records Management
Pima County	2022 2023	Records Management Enterprise Assessment
Salt River Pima- Maricopa Indian Community	2023	Records Management
Yavapai County	2021, 2022, 2023	Records Management
Yuma County	2022, 2023	Records Management
<b>California</b>		
Alameda County	2020	CA Valuation
Alpine County	2022	Records Management
Butte County	2022, 2023	Records Management
Calaveras County	2021, 2022, 2024	Records Management
Contra Costa County	2020, 2021	CA Valuation
Del Norte County	2022, 2023	Records Management
Fresno County	2022, 2023	Records Management
Glenn County	2021, 2022	Records Management
Inyo County	2021, 2022, 2023	Records Management
Kings County	2023	Records Management
Lake County	2023	Records Management
Mendocino County	2022, 2023	Records Management
Mono County	2022	Records Management
Monterey County	2021, 2022	Records Management
Orange County	2021	CA Valuation
Riverside County	2021, 2022, 2023	Records Management
Sacramento County	2021	CA Valuation
San Barbara County	2021, 2022, 2024	Records Management
San Benito County	2021, 2023	Records Management



# Five Year Client List

Client	Year	Type of Service
San Bernardino County	2020, 2021, 2022, 2024 2023	CA Valuation CA, Valuation, Records Management
San Diego County	2020, 2021, 2022, 2023, 2024	CA Valuation
San Joaquin County	2020, 2021 2022	CA Valuation Records Management
San Luis Obispo County	2020 2021 2022, 2023	CA Valuation CA Valuation, Records Management Records Management
Santa Clara County	2020 2021 2022, 2023, 2024	CA Valuation CA Valuation, Records Management Records Management
Santa Cruz County	2024	Records Management
Sierra County	2022	Records Management
Solano County	2020, 2021	CA Valuation
Sonoma County	2021, 2022, 2023	Records Management
Sutter County	2021, 2023	Records Management
Tehama County	2023	Records Management
Trinity County	2022	Records Management
Tulare County	2023	Records Management
Tuolumne County	2022	Records Management
Ventura County	2020 2021	CA Valuation CA Valuation, Records Management
Yolo County	2023, 2024	Records Management
<b>Colorado</b>		
Adams County	2023	Treasurer Plus
Alamose County	2022	Treasurer Plus
Archuleta County	2024	Assessment & Tax Plus
City & County of Broomfield	2021, 2022, 2023	Records Management
Clear Creek County	2023	Records Management
Conejos County	2022	Treasurer Plus
Costilla County	2022	Records Management, Treasurer Plus
Crowley County	2023	Records Management
Delta County	2023	Records Management
City & County of Denver	2020 2022, 2023, 2024	Enterprise Assessment & Tax Enterprise Assessment & Tax
Douglas County	2023	Records Management
Eagle County	2023	Records Management
Elbert County	2021, 2023	Records Management
Fremont County	2021, 2023, 2024 2022	Records Management Assessment & Tax Plus, Records Management
Garfield County	2021, 2024	Assessor Plus
Gilpin County	2022 2024	Records Management Treasurer Plus
Grand County	2022	Assessment & Tax Plus, Records Management
Hinsdale County	2021 2023	Treasurer Plus Assessor Plus
Jackson County	2023	Records Management
Logan County	2020 2021 2023	Enterprise Assessment & Tax Enterprise Assessment & Tax, Records Management Records Management
Mesa County	2023	Records Management
Mineral County	2021	Treasurer Plus
Montezuma County	2022	Records Management
Montrose County	2023	Records Management



Empowering people who serve the public®

# Five Year Client List

Client	Year	Type of Service
Morgan County	2023 2024	Records Management Assessment & Tax Plus, Records Management
Ouray County	2021 2023	Assessor Plus Assessor Plus, Records Management
Phillips County	2023	Records Management
Prowers County	2024	Records Management
Pueblo County	2021, 2023, 2024	Records Management,
Rio Grande County	2021, 2022	Records Management, Treasurer Plus
Saguache County	2023	Assessment & Tax Plus
Summit County	2021 2023	Assessor Plus, Records Management Records Management
Teller County	2024	Records Management
Weld County	2024	Records Management

## Connecticut

Town of Bethel	2020, 2022, 2023, 2024 2021	Enterprise Assessment Appraisal, Enterprise Assessment
City of Bristol	2023, 2024	Appraisal
Town of Darien	2020, 2021, 2024 2022, 2023	Enterprise Assessment Appraisal, Enterprise Assessment
City of Derby	2021, 2022, 2023, 2024 2020	Landisc, Univers Appraisal, Univers, Landisc
Town of Durham	2022, 2023, 2024	Enterprise Assessment
Town of Fairfield	2024	Appraisal
Town of Farmington	2021	Appraisal
Town of Greenwich	2023	Appraisal
Town of Groton	2021, 2022, 2023, 2024 2020	Enterprise Assessment Appraisal, Enterprise Assessment
Town of Hamden	2023	Appraisal
City of Hartford	2021	Appraisal
Town of Killingly	2020 2022	Enterprise Assessment Appraisal
Town of Mansfield	2023, 2024	Appraisal
Town of Plainville	2021, 2022, 2023 2020	Enterprise Assessment Appraisal, Enterprise Assessment
Town of Plymouth	2020, 2021, 2022	Landisc, Univers
Town of Portland	2020, 2022, 2023, 2024 2021	Enterprise Assessment Appraisal, Enterprise Assessment
Town of Putnam	2022	Appraisal
Town of Rocky Hill	2021	Enterprise Assessment
Town of Simsbury	2023	Appraisal
Town of Sterling	2020, 2021, 2022	Enterprise Assessment
Town of Thomaston	2021 2022, 2023, 2024	Appraisal, Enterprise Assessment Enterprise Assessment
Town of Trumbull	2023	Appraisal
Town of Wethersfield	2023	Appraisal
Town of Windsor Locks	2020, 2021, 2023	Appraisal

## Delaware

City of Dover	2020, 2024 2021, 2022, 2023	Enterprise Assessment Appraisal, Enterprise Assessment
Kent County	2021 2022, 2023	Appraisal Enterprise Assessment
City of Milford	2020, 2023 2021, 2022, 2024	Appraisal, Landisc, Univers Landisc, Univers

# Five Year Client List

Client	Year	Type of Service
New Castle County	2021	Appraisal, Enterprise Assessment
	2022, 2023, 2024	Enterprise Assessment
City of Rehoboth Beach	20024	Appraisal
Town of Smyrna	2020, 2022, 2023	Landisc, Univers
	2021, 2024	Appraisal, Landisc, Univers
Sussex County	2020, 2022	Enterprise Assessment
	2021, 2023, 2024	Appraisal, Enterprise Assessment
<b>Florida</b>		
Citrus County	2020,2021, 2022, 2023, 2024	Enterprise Assessment
Hillsborough County	2022	Appraisal
Leon County	2020, 2021, 2022, 2023, 2024	Enterprise Assessment
Manatee County	2020, 2021, 2022,2023, 2024	Enterprise Assessment
Okaloosa County	2021, 2023	Records Management,
Orange County	2022	Enterprise Assessment, Records Management
	2023	Records Management
Palm Beach County	2020, 2021, 2022, 2023, 2024	Enterprise Assessment
St. Johns County	2022, 2023, 2024	Enterprise Assessment
Volusia County	2020, 2021, 2022, 2023, 2024	Enterprise Assessment
<b>Georgia</b>		
Augusta-Richmond	2020, 2021, 2022, 2023, 2024	Enterprise Assessment & Tax
Baldwin County	2020, 2021, 2022, 2023, 2024	Enterprise Assessment & Tax
Chatham County	2020, 2021, 2022,2023	Enterprise Assessment & Tax
	2024	Appraisal; Enterprise Assessment & Tax
Clayton County	2023, 2024	Enterprise Assessment & Tax
Cobb County	2020, 2021	Appraisal, Enterprise Assessment & Tax
	2022, 2023, 2024	Enterprise Assessment & Tax
Columbia County	2020, 2021, 2022, 2023, 2024	Enterprise Assessment & Tax
Columbus Consolidated Gov.	2020, 2021, 2022, 2023, 2024	Enterprise Assessment & Tax
DeKalb County	2021	Enterprise Assessment & Tax, Image Collection
	2020, 2022, 2024	Enterprise Assessment & Tax
	2023	Enterprise Assessment & Tax, Records Management
Douglas County	2021, 2023	Appraisal, Enterprise Assessment & Tax
	2022, 2024	Enterprise Assessment & Tax
Fayette County	2020, 2021, 2022, 2023, 2024	Enterprise Assessment
Forsyth County	2020, 2021, 2022, 2023, 2024	Enterprise Assessment & Tax
Fulton County	2020	Enterprise Assessment & Tax, Image Collection
	2021, 2022, 2023, 2024	Enterprise Assessment & Tax
Glynn County	2022, 2024	Enterprise Assessment & Tax
	2023	Enterprise Assessment & Tax, Records Management
Gwinnett County	2020	Appraisal
	2022	Records Management
Muscogee County	2022	Records Management
Rockdale County	2021, 2023	Records Management,
<b>Hawaii</b>		
Hawaii County	2020, 2021, 2022, 2023, 2024	Enterprise Assessment & Tax
City & County of Honolulu	2020, 2021, 2022, 2023, 2042	Enterprise Assessment & Tax
Kauai County	2020, 2021,2022, 2023, 2024	Enterprise Assessment & Tax
Maui County	2020, 2021, 2022, 2023, 2024	Enterprise Assessment & Tax
<b>Idaho</b>		
Ada County	2024	Records Management
Adams County	2023	Records Management

## Five Year Client List

Client	Year	Type of Service
Bannock County	2024	Records Management
Blaine County	2023, 2024	Records Management
Bonner County	2024	Records Management
Minidoka County	2023	Records Management
Teton County	2023	Records Management
Valley County	2022, 2024	Records Management
<b>Illinois</b>		
Cook County	2020, 2021, 2022, 2023, 2024	Enterprise Assessment
DuPage County	2020, 2021, 2022, 2023, 2024	Enterprise Assessment & Tax
Lake County	2020, 2021, 2022, 2023, 2024	Enterprise Assessment & Tax
Macoupin County	2021, 2022	Records Management
McLean County	2023	Records Management
Peoria County	2023, 2024	Records Management
Sangamon County	2023	Enterprise Assessment & Tax
<b>Indiana</b>		
Clay County	2022	Appraisal
Crawford County	2022	Appraisal
Dearborn County	2021	Appraisal
Dubois County	2021	Appraisal
Floyd County	2022	Appraisal
Fountain County	2021	Appraisal
Gibson County	2022	Appraisal
Greene County	2022	Appraisal
Jackson County	2021	Appraisal
Jefferson County	2021	Appraisal
Johnson County	2022	Appraisal
Knox County	2021	Appraisal
Montgomery County	2022	Appraisal
Owens County	2021	Appraisal
Parke County	2021	Appraisal
Perry County	2021	Appraisal
Posey County	2021	Appraisal
Scott County	2021	Appraisal
Spencer County	2021	Appraisal
Sullivan County	2022, 2024	Appraisal
Vermillion County	2021	Appraisal
Warrick County	2021	Appraisal
Washington County	2021	Appraisal
<b>Iowa</b>		
Adair County	2022	Records Management
Calhoun County	2024	Records Management
Carroll County	2024	Records Management
Cerro Gordo County	2023	Records Management
Chickasaw County	2022	Records Management
Clarke County	2023	Records Management
Davis County	2023	Records Management
Des Moines County	2023	Records Management
Greene County	2022	Records Management
Lucas County	2023	Records Management
Muscatine County	2022	Records Management
Poweshiek County	2024	Records Management
Sac County	2023	Records Management
Sioux County	2024	Records Management

# Five Year Client List

Client	Year	Type of Service
Warren County	2023, 2024	Records Management
Wayne County	2023	Records Management
Worth County	2021, 2023	Records Management
<b>Kansas</b>		
State of Kansas DOR	2020, 2021, 2022, 2023, 2024	Assessment Pro
Bourbon County	2020, 2021 2022, 2024	Desktop Verification Assessment Pro
Cheyenne County	2023	Assessment & Tax Pro
Cowley County	2020, 2021	Desktop Verification
Douglas County	2021 2020 2022, 2023, 2024	Desktop Verification Desktop Verification, Assessment & Tax Pro Assessment & Tax Pro
Ellis County	2020, 2021 2023	Desktop Verification Assessment & Tax Pro
Franklin County	2022, 2023	Assessment & Tax Pro
Johnson County	2021 2020, 2022, 2024 2023	Assessment & Tax Pro, Image Collection Assessment & Tax Pro Assessment & Tax Pro, Geo-Referencing
Linn County	2020, 2021	Desktop Verification
Lyon County	2020, 2021 2022, 2023, 2024	Desktop Verification Assessment Pro
Marion County	2020, 2020, 2021	Desktop Verification
Meade County	2020, 2021	Desktop Verification
Montgomery County	2023	Assessment & Tax Pro
Osage County	2020	Assessment Pro
Pottawatomie County	2020, 2021, 2022, 2023, 2024	Assessment Pro
Pratt County	2020, 2021	Desktop Verification
Rawlins County	2022, 2023	Assessment & Tax Pro
Reno County	2023	Records Management
Riley County	2020	Desktop Verification
Rush County	2024	Assessment & Tax Pro
Sedgwick County	2021 2022, 2023	Assessment & Tax Pro, Desktop Verification Assessment & Tax Pro
Sumner County	2020, 2021, 2022, 2023, 2024	Assessment Pro
Thomas County	2022 2023	Assessment & Tax Pro Assessment & Tax Pro, Records Management
Washington County	2020, 2021, 2022, 2023, 2024	Assessment Pro
Wyandotte County	2020, 2021, 2022, 2023, 2024	Assessment Pro
<b>Kentucky</b>		
Fayette County	2020, 2021, 2022, 2023, 2024	Enterprise Assessment
<b>Louisiana</b>		
City of New Orleans	2020, 2021, 2022, 2023, 2024	Enterprise Property Tax
Orleans Parish	2020, 2021, 2022, 2023, 2024	Enterprise Assessment
<b>Maine</b>		
City of Lewiston	2020, 2021, 2022, 2024 2023	Enterprise Assessment Appraisal, Enterprise Assessment
City of Portland	2020, 2022, 2024 2021, 2023	Appraisal, Enterprise Assessment Enterprise Assessment
<b>Maryland</b>		
Baltimore County	2020, 2021, 2022, 2023	OASIS



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# Five Year Client List

Client	Year	Type of Service
<b>Massachusetts</b>		
Town of Adams	2020, 2021, 2022, 2023, 2024	Enterprise Assessment
Town of Alford	2020, 2021, 2022, 2023, 2024	Enterprise Assessment
Town of Ashby	2020, 2021, 2022, 2023, 2024	Enterprise Assessment
Town of Ashland	2020, 2023 2021, 2022, 2024	Appraisal, Enterprise Assessment Enterprise Assessment
Town of Ayer	2020, 2021, 2022, 2023, 2024	Enterprise Assessment
Town of Becker	2020, 2021, 2022, 2023, 2024	Enterprise Assessment
Town of Berkley	2020, 2021, 2022, 2023, 2024	Enterprise Assessment
Town of Bolton	2020, 2021, 2022, 2023, 2024	Enterprise Assessment
City of Brockton	2020 2021, 2022, 2023, 2024	Enterprise Assessment, Image Collection Appraisal, Enterprise Assessment
Town of Chester	2020, 2021, 2022, 2023, 2024	Enterprise Assessment
City of Chicopee	2020	Appraisal
Town of Conway	2020, 2021, 2022, 2023, 2024	Enterprise Assessment
Town of Devens	2020, 2021, 2022, 2023, 2024	Enterprise Assessment
Town of Dighton	2020, 2021, 2022, 2023, 2024	Enterprise Assessment
Town of Egremont	2020, 2021, 2022, 2023, 2024	Enterprise Assessment
Town of Hawley	2020, 2021, 2022, 2023, 2024	Enterprise Assessment
Town of Holliston	2020, 2021, 2022, 2024 2023	Enterprise Assessment Appraisal, Enterprise Assessment
Town of Lancaster	2020, 2021, 2022, 2023, 2024	Enterprise Assessment
Town of Lee	2020, 2021, 2022, 2023, 2024	Enterprise Assessment
Town of Middlefield	2020, 2021, 2022, 2023, 2024	Enterprise Assessment
Town of Millbury	2022, 2023	Appraisal
Town of Monroe	2020, 2021, 2022, 2023, 2024	Enterprise Assessment
Town of Natick	2020, 2021, 2022, 2023	Enterprise Assessment
Town of Needham	2020, 2021, 2023, 2024 2022	Enterprise Assessment Appraisal, Enterprise Assessment
Town of New Braintree	2020, 2021, 2022, 2023, 2024	Enterprise Assessment
City of Northampton	2020, 2021, 2022, 2023, 2024	Appraisal, Enterprise Assessment
Town of North Reading	2020, 2021, 2022, 2023, 2024	Enterprise Assessment
City of Peabody	201, 2022, 2023, 2024 2020	Appraisal, Enterprise Assessment Enterprise Assessment
City of Pittsfield	2020, 2023 2021, 2022	Appraisal, Enterprise Assessment Enterprise Assessment
Town of Richmond	2020, 2021, 2022, 2023, 2024	Enterprise Assessment
Town of Royalston	2020, 2021, 2022, 2023, 2024	Enterprise Assessment
Town of Seekonk	2020, 2023 2021, 2022, 2024	Appraisal, Enterprise Assessment Enterprise Assessment
Town of Sheffield	2020, 2021, 2022, 2023, 2024	Enterprise Assessment
Town of Somerset	2020, 2023, 2024 2021, 2022	Appraisal, Enterprise Assessment Enterprise Assessment
City of Springfield	2020, 2022 2021, 2023, 2024	Appraisal, Enterprise Assessment Enterprise Assessment
Town of Washington	2020, 2021, 2022, 2023 2024	Enterprise Assessment Appraisal, Enterprise Assessment
Town of West Stockbridge	2020, 2021, 2022, 2023, 2024	Enterprise Assessment
<b>Michigan</b>		
Alpena County	2024	Records Management
Cass County	2023	Records Management
Charlevoix County	2024	Records Management
Emmet County	2024	Records Management
Genesee County	2022	Records Management
Ingham County	2021, 2023	Records Management

# Five Year Client List

Client	Year	Type of Service
Kalamazoo County	2022	Records Management
Kent County	2023, 2024	Records Management
Leelanau County	2023	Records Management
Macomb County	2021, 2022, 2023, 2024	Records Management
Missaukee County	2022	Records Management
Muskegon County	2023	Records Management
Northrop Assessing, Inc.	2021, 2022, 2023	Appraisal
Osceola	2021, 2023	Records Management
Saginaw County	2024	Records Management
Van Buren County	2023, 2024	Records Management
Washtenaw County	2023, 2024	Records Management
Wayne County	2023, 2024	Records Management
Wexford County	2021, 2022, 2023	Records Management
<b>Minnesota</b>		
Anoka County	2020, 2021, 2022, 2023 2024	Enterprise Assessment & Tax Enterprise Assessment, Image Collection
Beltrami County	2020, 2021, 2022, 2023, 2024	Enterprise Assessment & Tax
Benton County	2023	Enterprise Assessment & Tax
Blue Earth County	2020, 2021, 2022, 2023	Enterprise Assessment & Tax
Brown County	2020, 2021, 2022, 2023, 2024	Enterprise Assessment & Tax
Carver County	2022, 2023, 2024	Enterprise Assessment & Tax
Chisago County	2022, 2023	Enterprise Assessment & Tax
Crow Wing County	2020, 2021, 2024 2022, 2023	Enterprise Assessment & Tax Enterprise Assessment & Tax, Records Management
Dakota County	2020, 2021, 2022, 2023, 2024	Enterprise Assessment & Tax
Fillmore County	2021, 2022, 2023 2024	Enterprise Assessment & Tax Records Management
Freeborn County	2022, 2023	Enterprise Assessment & Tax
Goodhue County	2021, 2022, 2023	Enterprise Assessment & Tax
Hubbard County	2020, 2021, 2022, 2023, 2024	Enterprise Assessment & Tax
Isanti County	2022, 2023	Enterprise Assessment & Tax
Jackson County	2022, 2023	Enterprise Assessment & Tax
Kittson County	2021, 2022, 2023, 2024	Enterprise Assessment
Le Sueur County	2022, 2023	Enterprise Assessment & Tax
Martin County	2020, 2021, 2022, 2023, 2024	Enterprise Assessment & Tax
McLeod County	2021, 2022, 2023	Enterprise Assessment & Tax
Mille Lacs County	2024	Enterprise Assessment & Tax
City of Minneapolis	2022, 2023, 2024	Enterprise Assessment
Olmsted County	2020, 2024 2021 2022 2023	Enterprise Assessment & Tax Image Collection Image Collection, Enterprise Assessment & Tax
Otter Tail County	2022, 2023, 2024	Appraisal, Enterprise Assessment & Tax
Pennington County	2022, 2023, 2024	Enterprise Property Tax
Pine County	2021, 2022, 2023, 2024	Enterprise Assessment & Tax
Ramsey County	2020, 2021, 2022, 2023, 2024	Enterprise Assessment & Tax
Scott County	2020, 2021, 2023, 2024 2022	Enterprise Assessment & Tax Appraisal, Enterprise Assessment & Tax
Sterns County	2022, 2023, 2024	Enterprise Assessment & Tax
Swift County	2023	Records Management
Wabasha County	2022, 2023	Enterprise Assessment & Tax
Waseca County	2021, 2022, 2023, 2024	Enterprise Assessment & Tax
Watonwan County	2020, 2022, 2023, 2024	Enterprise Assessment & Tax
Winona County	2022, 2023, 2024	Enterprise Assessment & Tax



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# Five Year Client List

Client	Year	Type of Service
Wright County	2020 2022, 2023, 2024	Enterprise Assessment Enterprise Assessment & Tax
<b>Missouri</b>		
Cape Girardeau County	2020	Enterprise Assessment & Tax
Greene County	2020, 2021, 2022, 2023, 2024	Enterprise Assessment
Jackson County	2020 2022, 2023, 2024	Appraisal, Enterprise Assessment Enterprise Assessment
Jasper County	2020, 2021, 2022, 2023, 2024	Enterprise Assessment
Knox County	2020, 2021, 2022, 2023, 2024	Univers
St. Louis County	2020, 2021, 2022, 2023, 2024	Enterprise Assessment & Tax
<b>Montana</b>		
State of Montana DOR	2020, 2021, 2022, 2023, 2024	Assessment Pro
Carter County	2022	Records Management
Gallatin County	2023	Records Management
Lake County	2021, 2022	Records Management
<b>Nebraska</b>		
Lancaster County	2020 2021, 2022, 2023, 2024	Assessment Pro, Desktop Verification Assessment Pro
Sarpy County	2024	Records Management
<b>Nevada</b>		
Elko County	2023	Records Management
Lander County	2023, 2024	Records Management
Lyons County	2022	Records Management
Mineral County	2024	Records Management
Nye County	2021, 2023	Records Management
Pershing County	2021, 2023	Records Management
Storey County	2021, 2022	Records Management
Washoe County	2021, 2022, 2024	Records Management
<b>New Hampshire</b>		
Town of Conway	2020, 2021, 2022, 2023, 2024	Landisc, Univers
City of Dover	2020, 2021, 2022, 2023, 2024	Landisc, Univers
Town of Gilford	2020, 2021, 2022, 2023, 2024	Landisc, Univers
Town of Peterborough	2020, 2021, 2022, 2023, 2024	Enterprise Assessment
Town of Plaistow	2020, 2022	Landisc, Univers
<b>New Jersey</b>		
City of East Orange	2021	Appraisal
Somerset County	2024	Records Management
Voorhees Township	2020, 2021, 2023	Landisc, Univers
<b>New Mexico</b>		
Bernalillo County	2020, 2021 2022, 2023	Enterprise Assessment & Tax Enterprise Assessment & Tax, Records Management
Catron County	2023, 2024	Assessment & Tax Plus
Chaves County	2022 2023	Assessment & Tax Plus Assessment & Tax Plus, Records Management
Cibola County	2022	Records Management
Dona Ana County	2023	Assessor Plus, Records Management
Eddy County	2023	Assessment Tax Plus
Grant County	2023	Records Management



# Five Year Client List

Client	Year	Type of Service
Guadalupe County	2021	Assessor Plus, Records Management
Lincoln County	2024	Assessment & Tax Plus
Los Alamos County	2021, 2022, 2023	Records Management
McKinley County	2022, 2023	Assessment & Tax Plus
Otero County	2021, 2022, 2023	Assessment & Tax Plus
Quay County	2023, 2024	Records Management
Rio Arriba County	2023	Records Management
Roosevelt County	2021	Assessment & Tax Plus, Records Management
Sandoval County	2021, 2022, 2024	Records Management
San Juan County	2022	Records Management
Socorro County	2022, 2024	Assessment & Tax Plus
Union County	2023	Assessor Plus
Valencia County	2021	Records Management
	2022, 2023	Assessment & Tax Plus, Records Management

## New York

Town of Babylon	2023, 2024	Enterprise Assessment & Tax
Town of Brookhaven	2020, 2021, 2022, 2023, 2024	Enterprise Assessment
Village of Garden City	2020, 2021, 2022, 2023, 2024	Enterprise Assessment & Tax
Town of Greenburgh	2022, 2023	Appraisal
Village of Hempstead	2023	Appraisal, Enterprise Assessment & Tax
	2024	Appraisal
Town of Lewisboro	2020, 2021, 2022, 2023, 2024	Unifers
City of Long Beach	2023	Enterprise Assessment & Tax
Village of Mineloa	2020, 2021, 2022, 2023, 2024	Unifers
Nassau County	2020, 2021, 2022, 2023, 2024	Enterprise Assessment & Tax
Town of North Salem	2020, 2022, 2023, 2024	Appraisal
City of New York	2020, 2021, 2022, 2023, 2024	Enterprise Assessment & Tax
Orleans County	2022, 2024	Records Management
Town of Ossining	2021, 2022	Appraisal
	2024	Appraisal, Enterprise Assessment
Town of Rhinebeck	2021	Appraisal
City of Rye	2024	Enterprise Assessment
Town of Rye	2021, 2022, 2023, 2024	Appraisal
Village of Scarsdale	2023	Enterprise Assessment & Tax
Town of Southampton	2020, 2021	Appraisal
Village of Southampton	2023	Enterprise Assessment & Tax
Tioga County	2023	Records Management
Tompkins County	2022, 2023, 2024	Records Management
Wayne County	2024	Records Management

## North Carolina

Alamance County	2020, 2021	Desktop Verification
Alexander County	2023	Records Management
Anson County	2020, 2021, 2022, 2023	MAS
Catawba County	2020, 2021, 2022, 2023, 2024	Enterprise Assessment
Currituck County	2020, 2021, 2022, 2023, 2024	Enterprise Assessment
Dare County	2020, 2021	Desktop Verification, Enterprise Assessment
	2022, 2023, 2024	Enterprise Assessment
Davidson County	2021	Desktop Verification
Durham County	2021, 2022, 2023	Records Management
Franklin County	2020, 2022, 2023, 2024	Enterprise Assessment
	2021	Appraisal, Enterprise Assessment
Gaston County	2020	Desktop Verification
Greene County	2020, 2021, 2022	Unifers
Halifax County	2020, 2021, 2022, 2023	Enterprise Assessment



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# Five Year Client List

Client	Year	Type of Service
Hoke County	2021, 2022, 2023, 2024	Unifers
Jackson County	2020, 2021	Desktop Verification
Johnson County	2024	Records Management
Jones County	2020	Enterprise Assessment
Lee County	2020, 2021, 2022, 2023, 2024	Enterprise Assessment
Lincoln County	2021	Desktop Verification
Madison County	2022	Appraisal
Martin County	2020, 2021, 2022	Landisc, Unifers
Mecklenburg County	2023, 2024	Records Management
Moore County	2020, 2021, 2022, 2023, 2024	Enterprise Assessment
Nash County	2020, 2021, 2022, 2023, 2024	Enterprise Assessment
New Hanover County	2020, 2021, 2022, 2023, 2024	Enterprise Assessment
Onslow County	2020, 2021, 2022, 2023	Enterprise Assessment
Pasquotank County	2020, 2021, 2022, 2023, 2024	Unifers
Pender County	2020, 2021, 2022, 2023, 2024	Enterprise Assessment
Rowan County	2022, 2023, 2024	Enterprise Assessment & Tax
Sampson County	2020, 2021, 2022, 2023, 2024	Enterprise Assessment
Wake County	2020	Image Collection
	2022, 2023	Records Management
Watauga County	2020, 2021, 2022, 2023, 2024	Enterprise Assessment
Wilkes County	2020, 2021, 2022, 2023, 2024	Enterprise Assessment
Yancey County	2020	Landisc, Unifers
	2021, 2022, 2023, 2024	Enterprise Assessment
<b>North Dakota</b>		
NDRIN	2022	Records Management
Grand Folks County	2023	Records Management
City of Jamestown	2021, 2022, 2023	Assessment Pro
Stutsman County	2021, 2022, 2023	Assessment Pro
Trail County	2022	Records Management
<b>Ohio</b>		
Ashtabula County	2020, 2021, 2022, 2023, 2024	Enterprise Assessment & Tax
Athens County	2020, 2021, 2024	Appraisal, Enterprise Assessment & Tax
	2022, 2023	Enterprise Assessment & Tax
Auglaize County	2020, 2021, 2022, 2023, 2024	Enterprise Assessment & Tax
Butler County	2021, 2022, 2023	Enterprise Assessment & Tax
	2024	Appraisal, Enterprise Assessment & Tax
Clark County	2021	Appraisal, Enterprise Assessment & Tax
	2022, 2023, 2024	Enterprise Assessment & Tax
Clermont County	2020, 2022, 2023, 2024	Enterprise Assessment & Tax
	2021	Appraisal, Enterprise Assessment & Tax
Coshocton County	2020, 2021, 2022, 2023, 2024	Enterprise Assessment & Tax
Delaware County	2021, 2022, 2024	Appraisal
Erie County	2021	Records Management
Fairfield County	2020, 2021, 2022, 2024	Enterprise Assessment & Tax
	2023	Appraisal, Enterprise Assessment & Tax
Franklin County	2020, 2023, 2024	Enterprise Assessment & Tax
	2021	Appraisal, Enterprise Assessment & Tax
	2022	Enterprise Assessment & Tax, Records Management
Gallia County	2020	Appraisal, Enterprise Assessment & Tax, Desktop Verification
	2021	Appraisal, Desktop Verification
	2022, 2023	Enterprise Assessment & Tax
	2024	Appraisal, Enterprise Assessment & Tax
Geauga County	2024	Appraisal

# Five Year Client List

Client	Year	Type of Service
Greene County	2020, 2023 2021, 2022 2024	Appraisal, Enterprise Assessment & Tax Enterprise Assessment & Tax Appraisal
Jackson County	2021, 2022, 2023, 2024	Enterprise Assessment & Tax
Lake County	2020 2021, 2022, 2023, 2024	Appraisal, Enterprise Assessment & Tax Enterprise Assessment & Tax
Lucas County	2020, 2021, 2022, 2024 2023	Enterprise Assessment & Tax Appraisal, Enterprise Assessment & Tax
Miami Conservancy District	2020, 2021, 2022, 2023, 2024	Enterprise Assessment
Montgomery County	2020, 2021, 2022, 2023, 2024	Enterprise Assessment & Tax
Ottawa County	2020, 2021, 2022	Enterprise Assessment & Tax
Pickaway County	2023 2021 2022, 2024	Appraisal, Enterprise Assessment & Tax Appraisal Enterprise Assessment & Tax
Richland County	2020 2021 2022, 2023, 2024	Appraisal Appraisal, Enterprise Assessment & Tax Enterprise Assessment & Tax
Scioto County	2023	Appraisal
Seneca County	2020, 2021, 2022, 2023, 2024	Enterprise Assessment & Tax
Stark County	2020, 2021, 2022, 2023, 2024	Enterprise Assessment & Tax
Summit County	2020, 2021, 2022, 2024 2023	Enterprise Assessment & Tax Enterprise Assessment & Tax, Records Management
<b>Oklahoma</b>		
Cleveland County	2021, 2022, 2023	Records Management
Rogers County	2021, 2022, 2024	Records Management
Tulsa County	2022	Records Management
Wagoner County	2022, 2023, 2024	Records Management
<b>Oregon</b>		
Curry County	2020, 2021, 2022, 2023, 2024	Assessment & Tax Pro
Douglas County	2020, 2022, 2023, 2024	Assessment & Tax Pro
Josephine County	2021, 2022, 2023, 2024	Assessment & Tax Pro
Lincoln County	2020, 2021, 2022, 2023, 2024	Assessment & Tax Pro
Multnomah County	2020, 2021, 2022, 2023, 2024	Assessment & Tax Pro
Washington County	2020, 2021, 2022, 2023	Assessment & Tax Pro
<b>Pennsylvania</b>		
Allegheny County	2020, 2021, 2022 2023, 2024	Enterprise Assessment Appraisal, Enterprise Assessment
Armstrong County	2020, 2021, 2022, 2023, 2024	Enterprise Assessment
Beaver County	2020 2021 2022, 2023, 2024	Appraisal, Enterprise Assessment & Tax Appraisal Enterprise Assessment & Tax
Bedford County	2020, 2021, 2022, 2023, 2024	Enterprise Assessment
Berks County	2020, 2021, 2022, 2023, 2024	Enterprise Assessment
Bucks County	2020, 2021, 2022, 2023, 2024	Enterprise Assessment & Tax
Butler County	2020, 2021, 2022, 2023, 2024	Enterprise Assessment & Tax
Cambria County	2021, 2023	Records Management
Carbon County	2020, 2021, 2022, 2023, 2024	Landisc, Univers
Chester County	2020, 2021, 2022, 2023, 2024	Enterprise Assessment & Tax
Clarion County	2020, 2021, 2022	Enterprise Assessment
Columbia County	2020, 2021, 2022, 2023, 2024	Enterprise Assessment
Delaware County	2021, 2022, 2023, 2024 2020	Enterprise Assessment & Tax Appraisal, Enterprise Assessment & Tax



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# Five Year Client List

Client	Year	Type of Service
Erie County	2020, 2021, 2022, 2023, 2024	Enterprise Assessment & Tax
Fayette County	2020, 2021, 2022, 2023	Landisc
Juniata County	2024	Enterprise Assessment, Records Management
Lackawanna County	2020, 2021, 2022, 2023	Enterprise Assessment
	2022	Appraisal, Enterprise Assessment & Tax, Records Management
	2023, 2024	Enterprise Assessment & Tax, Records Management
Lancaster County	2023, 2024	Records Management
Lycoming County	2021, 2022, 2023	Enterprise Assessment
	2024	Appraisal, Enterprise Assessment
Mercer County	2020, 2021, 2022, 2024	Enterprise Assessment
	2023	Appraisal, Enterprise Assessment
Monroe County	2021, 2022, 2023, 2024	Enterprise Assessment & Tax
Montgomery County	2020, 2022, 2023, 2024	Enterprise Assessment
Montour County	2020, 2021, 2022, 2023, 2024	Landisc, Unifers
Northampton County	2020, 2021, 2022, 2023, 2024	Enterprise Assessment & Tax
City of Philadelphia	2020	Enterprise Assessment
	2021	Image Collection, Records Management
	2022, 2023, 2024	Enterprise Assessment & Tax, Records Management
Sullivan County	2021, 2022, 2023	Landisc, Unifers
Washington County	2022, 2023, 2024	Enterprise Assessment
Wayne County	2021	Appraisal
Westmoreland County	2020, 2021, 2022, 2023	Enterprise Assessment
York County	2020, 2021, 2022, 2024	Enterprise Assessment & Tax
	2023	Enterprise Assessment & Tax, Records Management
<b>Rhode Island</b>		
City of Newport	2023	Appraisal
<b>South Carolina</b>		
Lexington County	2020	Enterprise Property Tax
<b>South Dakota</b>		
Custer County	2024	Records Management
Lawrence County	2020, 2021, 2022, 2023, 2024	Assessment Pro
Meade County	2020, 2021, 2022	Assessment Pro
Pennington County	2020, 2022, 2023, 2024	Assessment Pro
	2021	Assessment Pro, Desktop Verification
<b>Tennessee</b>		
State of Tennessee	2020, 2021, 2022, 2023, 2024	Enterprise Assessment
Knox County	2020, 2021, 2022, 2023, 2024	Enterprise Assessment
Shelby County	2020, 2021, 2022, 2023, 2024	Enterprise Assessment
<b>Texas</b>		
Texas Comptroller of Public Acct.	2020, 2021, 2022, 2023, 2024	Assessment Pro
Anderson County	2020, 2021, 2022, 2023, 2024	Property Tax Pro
Andrews County	2022, 2023	Records Management
Aransas County	2021	Records Management
Bandera County	2023	Records Management
Bastrop County	2021, 2022, 2023, 2024	Property Tax Pro
Bowie County	2022	Records Management
Brazoria County	2022, 2023	Records Management
City of Brookshire	2020, 2021, 2022, 2023, 2024	Property Tax Pro
Burnet County	2022	Records Management

# Five Year Client List

Client	Year	Type of Service
Caldwell County	2023, 2024	Records Management
Calhoun County	2022, 2023	Records Management
Clay County	2021, 2023	Records Management
Coleman County	2020, 2021, 2022, 2023	Assessment & Tax Pro
Colorado County	2024	Records Management
Dallam County	2023	Records Management
Delta County	2023	Records Management
Denton County	2020, 2023	Desktop Verification
Donley County	2023	Records Management
Eastland County	2021, 2022, 2024	Records Management
Ector County	2021, 2022, 2023	Records Management
Erath County	2022, 2023	Records Management
Fort Bend County	2020	Assessment Pro, Desktop Verification
Franklin County	2021, 2022, 2023, 2024	Assessment Pro
	2020, 2022, 2024	Property Tax Pro
Gonzales County	2021, 2023	Property Tax Pro, Records Management
	2020, 2024	Property Tax Pro
Grayson County	2021, 2022, 2023	Property Tax Pro, Records Management
	2021	Property Tax Pro
Grimes County	2020, 2021, 2022, 2023, 2024	Assessment & Tax Pro
Guadalupe County	2021, 2022, 2023, 2024	Property Tax Pro
Hale County	2022, 2023, 2024	Records Management
Hamilton County	2022, 2023, 2024	Records Management
Harrison County	2021, 2023	Records Management
Hays County	2020, 2021, 2022, 2023, 2024	Assessment & Tax Pro
Henderson County	2021	Records Management
Hood County	2021	Records Management
Howard County	2021	Records Management
Hunt County	2021	Records Management
Hutchinson County	2020, 2021, 2022, 2023, 2024	Property Tax Pro
Jackson County	2020, 2021, 2022, 2023, 2024	Assessment & Tax Pro
Jasper County	2020, 2021, 2022, 2023	Property Tax Pro
	2024	Property Tax Pro, Records Management
Karnes County	2022, 2023	Records Management
Kauffman County	2022, 2023	Records Management
Lamar County	2024	Records Management
Laredo County	2021	Records Management
Lavaca County	2020, 2021, 2022, 2023, 2024	Property Tax Pro
Liberty County	2022, 2023	Records Management
Limestone County	2020, 2021, 2022, 2023, 2024	Assessment & Tax Pro
Lubbock County	2020	Assessment & Tax Pro, Image Collection
	2021	Assessment & Tax Pro, Records Management
McLennan County	2022, 2023, 2024	Assessment & Tax Pro
	2021, 2022, 2023, 2024	Records Management
Medina County	2020, 2021, 2022, 2023, 2024	Property Tax Pro
Mills County	2022	Records Management
Montgomery County	2020, 2021, 2022, 2023, 2024	Assessment Pro
Navarro County	2023	Records Management
Orange County	2021, 2022, 2024	Assessment Pro
	2023	Records Management
Palo Pinto County	2021, 2023	Records Management
Panola County	2023, 2024	Records Management
Parker County	2022	Records Management
Polk County	2023	Records Management
Potter County	2022	Records Management
Randall County	2023	Records Management



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# Five Year Client List

Client	Year	Type of Service
Rockwell County	2023	Records Management
San Jacinto County	2020, 2021, 2022, 2023, 2024	Property Tax Pro
Somervell County	2022	Records Management
Upshur County	2024	Records Management
Van Zandt County	2021	Records Management
Victoria County	2020, 2021	Property Tax Pro
Waller County	2020, 2021, 2022, 2023	Property Tax Pro
	2024	Property Tax Pro, Records Management
Washington County	2021	Property Tax Pro
Williamson County	2020, 2021	Assessment & Tax Pro, Desktop Verification
	2022, 2023	Assessment & Tax Pro
	2024	Assessment & Tax Pro, Records Management
Winkler County	2020, 2022, 2024	Property Tax Pro
	2021, 2023	Property Tax Pro, Records Management
Wise County	2021, 2023	Records Management
Wood County	2020, 2021, 2023, 2024	Property Tax Pro
	2022	Property Tax Pro, Records Management
Yoakum County	2021	Records Management

## Utah

Box Elder County	2023	Records Management
Iron County	2024	Records Management
Juab County	2023, 2024	Records Management
Kane County	2021	Records Management
Millard County	2022	Assessment & Tax Plus, Records Management
Salt Lake County	2022	Records Management
Sanpete County	2023	Records Management
Sevier County	2022, 2023, 2024	Records Management
Summit County	2022, 2024	Records Management
Tooele County	2021, 2022, 2023	Records Management
Washington County	2022, 2023	Records Management

## Vermont

Town of Bakersfield	2024	Appraisal
City of Burlington	2021	Appraisal
Town of Castleton	2023	Appraisal
Town of Chittenden	2024	Appraisal
Town of Hartford	2024	Appraisal
Town of Pawlet	2024	Appraisal
Town of Proctor	2024	Appraisal
City of Saint Albans	2023	Appraisal
Town of Shelburne	2024	Appraisal

## Virginia

City of Chesapeake	2021	Desktop Verification
Chesterfield County	2020, 2021, 2022, 2023, 2024	Enterprise Assessment
Fairfax County	2020, 2021, 2022, 2023, 2024	Enterprise Assessment & Tax
City of Fredericksburg	2020, 2021, 2022, 2023, 2024	Enterprise Assessment
Hanover County	2021, 2022	Records Management
Loudoun County	2020, 2021, 2022, 2023, 2024	Enterprise Assessment
City of Manassas Park	2020, 2021, 2022, 2023, 2024	Landisc, Univers
Montgomery County	2020, 2021, 2022, 2023, 2024	Enterprise Assessment
City of Newport News	2020, 2021, 2022, 2023, 2024	Enterprise Assessment & Tax
Prince William County	2022	Records Management
Scott County	2024	Records Management
Wise County	2021, 2023	Assessor Plus

# Five Year Client List

Client	Year	Type of Service
<b>Washington</b>		
Adams County	2023	Records Management
Benton County	2022, 2024	Records Management
Cowlitz County	2022, 2023	Records Management
Garfield County	2023	Records Management
Kittitas County	2022	Records Management
Kitsap County	2024	Records Management
Klickitat County	2022	Records Management
Lewis County	2024	Enterprise Assessment & Tax
Lincoln County	2021, 2023	Records Management
Mason County	2022, 2023	Records Management
Pierce County	2022	Enterprise Property Tax
Spokane County	2024	Records Management
Stevens County	2021	Records Management
Whitman County	2022, 2023	Records Management
<b>West Virginia</b>		
State of West Virginia	2021, 2022, 2023, 2024	Enterprise Assessment & Tax
	2020	Appraisal, Enterprise Assessment & Tax
Jackson County	2020, 2021	Landisc
Mason County	2020	Appraisal
	2021	Appraisal, Landisc
	2022, 2023	Landisc
Putnam County	2020	Appraisal
Wetzel County	2020, 2021, 2022	Landisc
<b>Wisconsin</b>		
State of Wisconsin DOR	2020, 2021, 2022, 2023, 2024	Enterprise Assessment & Tax
City of Baraboo	2020	Appraisal
City of Beloit	2020, 2024	Appraisal
Village of Caledonia	2020, 2023	Appraisal, Univers
Village of Chenequa	2023	Appraisal
Town of Grand Chute	2020, 2022	Appraisal
Village of Greendale	2020, 2021, 2023	Appraisal
City of Kenosha	2022	Appraisal
City of Muskego	2021	Appraisal, Enterprise Assessment
	2020, 2022, 2023, 2024	Enterprise Assessment
City of Oak Creek	2022	Appraisal
Village of Oconomowoc Lake	2022	Appraisal
City of Oshkosh	2020	Appraisal
	2021, 2023	Appraisal, Enterprise Assessment
	2022, 2024	Enterprise Assessment
Village of Plover	2020, 2022	Appraisal
Village of River Hills	2021	Appraisal
Village of Rochester	2024	Appraisal
City of South Milwaukee	2021	Appraisal
City of Sun Prairie	2020	Appraisal
Town of Waukesha	2022	Appraisal
Village of Whitefish Bay	2020, 2021	Appraisal

Client	Year	Type of Service
<b>Bahamas</b>		
Commonwealth of the Bahamas	2020, 2022, 2023, 2024 2021	Enterprise Assessment & Tax Appraisal, Enterprise Assessment & Tax
<b>Canada</b>		
Province of British Columbia	2021, 2022, 2023, 2024	Enterprise Assessment
City of Calgary	2020, 2021, 2022, 2023, 2024	Enterprise Assessment
Ville de Montreal	2022, 2023	Enterprise Assessment & Tax
Province of Newfoundland	2020, 2021, 2022, 2023, 2024	Enterprise Assessment
Province of Nova Scotia	2020, 2021, 2022, 2023, 2024	Enterprise Assessment
Service New Brunswick	2023	Enterprise Assessment
Municipality of Wood Buffalo	2021, 2022, 2023	Enterprise Assessment & Tax
Government of Yukon	2022, 2023	Enterprise Assessment & Tax



## Clarifications & Understandings

Tyler's Proposal is based on the delivery of the requested appraisal services according to Tyler's standard methodology and Tyler's standard contract. That methodology, and that contract, have been refined and enhanced over Tyler's many years of operation in the public sector appraisal services market. Tyler's submission of its Proposal does not waive Tyler's right to negotiate any and all terms to the mutual satisfaction of the parties.

Tyler will consider its methodology and its contract to be the starting point for negotiations unless expressly stated otherwise in its Proposal. Tyler's standard contract is included for your reference. The services to be performed by Tyler and the equipment, tools, materials, and supplies Tyler will provide, shall be mutually agreed to by the parties and set forth in a statement of work. If the parties agree to incorporate the RFP and Tyler's Proposal into the final contract rather than enter into a statement of work, Tyler's Proposal, setting forth the services to be performed by Tyler, shall take precedence over the RFP. Tyler is providing representative exceptions to standard procurement terms and conditions for your review. This list does not negate any of the expectations Tyler has stated above.

- **Compliance with RFP:** Tyler's Proposal complies with and is subject to the RFP's terms, **except as modified by, taken exception to, and as otherwise provided in Tyler's Proposal.**
- **Assignment:** Neither party may assign the contract without the prior written consent of the other party, except that Tyler may, without the prior written consent of the Client, assign the contract in its entirety to the surviving entity of any merger or consolidation or to any purchaser of substantially all of Tyler's assets.
- **Client List:** Tyler's list of current and previous reappraisals will exclude certain clients due to contractual limitations that prevent Tyler from disclosing such clients.
- **Compliance with Applicable Laws:** Tyler reserves the right to review and discuss with the Client specific laws and regulations that the Client wishes to incorporate into the final contract. The parties acknowledge that the terms and conditions of the parties' contract shall be based on the laws, rules, and regulations as of the effective date. In the event any applicable laws, rules or regulations change so as to create additional work for Tyler not provided for in the contract, Client shall allow Tyler a reasonable extension of time to complete the services, and additional compensation as mutually agreed to by the parties.
- **Indemnification:** Tyler will defend, indemnify, and hold harmless the Client from third party claims in accordance with the standard Tyler contract.
- **Insurance:** Tyler has provided its evidence of insurance certificate. Tyler's insurance program is established at a corporate level and is not subject to change for individual customers. While performing services under an agreement with the Client, we will agree to maintain the following levels of insurance: (a) Commercial General Liability (CGL) of \$1,000,000 per occurrence and in the aggregate; (b) Automobile Liability of \$1,000,000; (c) Professional Liability of \$1,000,000; (d) Workers' Compensation complying with applicable statutory requirements; and (e) Excess/Umbrella Liability of \$5,000,000 per occurrence and in the aggregate. The coverage limits set forth on our certificate of insurance do not apply separately.
- **Limitation of Liability:** Tyler's liability for damages shall be subject to the limitation and exclusion of damages set forth in the standard Tyler contract.
- **Ownership/Public Disclosure:** Unless otherwise agreed, we do not agree to work-for-hire provisions. Tyler retains all intellectual property and confidentiality rights in and to our proprietary and/or confidential information and deliverables, if any. We reserve the right to protest the public disclosure of our confidential business information/trade secrets but will comply with applicable public records laws.



## APPRAISAL SERVICES AGREEMENT

This Agreement is made between Tyler Technologies, Inc. and Client.

WHEREAS, Tyler is in the business of providing appraisal services to counties and municipalities; and

WHEREAS, Client desires to engage Tyler to perform appraisal services.

NOW THEREFORE, in consideration of the foregoing and of the mutual covenants and promises set forth in this Agreement, Tyler and Client agree as follows:

### SECTION A – DEFINITIONS

- **“Agreement”** means this Appraisal Services Agreement.
- **“Client”** means \_\_\_\_\_.
- **“Effective Date”** means the last date on which both parties have signed this Agreement.
- **“Force Majeure”** means an event beyond the reasonable control of you or us, including, without limitation, governmental action, war, riot or civil commotion, fire, natural disaster, severe or unusual weather or climatic conditions which exist for a substantial period of time, extreme inflation (defined as eight percent or greater per year) or any other cause that could not with reasonable diligence be foreseen or prevented by you or us.
- **“Investment Summary”** means the total fixed price and per diem rates to complete the services described in this Agreement, attached as Exhibit A.
- **“Invoicing and Payment Policy”** means the invoicing and payment policy. A copy of our current Invoicing and Payment Policy is attached as Exhibit B.
- **“Tyler”** means Tyler Technologies, Inc., a Delaware corporation.
- **“we”, “us”, “our”** and similar terms mean Tyler.
- **“you”** and similar terms mean Client.

### SECTION B – PROFESSIONAL SERVICES

1. Services. We will provide you the professional services, consistent with industry standards, as described in the Statement of Work attached hereto as Exhibit C.
2. Professional Services Fees. You agree to pay us the professional services fees in the amounts set forth in Exhibit A – Investment Summary. Those amounts are payable in accordance with our Invoicing and Payment Policy.
3. Services Warranty. We will perform the services in a professional, workmanlike manner, consistent with industry standards and the specifications described in the Statement of Work – Exhibit C.

- 3.1 [If applicable] We warrant that at a minimum, ninety-eight percent (98%) of the images provided under this Agreement meet the IAAO (International Association of Assessing Officers) desktop review standard and shall be free from defects in material and workmanship. This warranty shall be effective through the term of this Agreement.
- 3.1.1 In the event any such defects shall appear within such period, we shall, at your choice, either:
- a) Refund the prorated amount of compensation earned from such defective images, or
  - b) Replace or repair defective items at our sole expense, including all shipping costs.
- 3.1.2 Client and Tyler agree that we are reliant on the accuracy of information provided by you and subject to uncontrollable and natural events such as weather, foliage, the condition of private properties at the time of imaging, and public accessibility to properties in the image collection process. As such, you agree to incorporate such events into your reasonable judgment in determining the defective nature of any single image.
4. Site Access and Requirements. You agree to provide us with access to your personnel as may be reasonably necessary for us to provide the professional services as described herein, subject to any reasonable security protocols or other written policies provided to us as of the Effective Date, and thereafter as mutually agreed to by you and us.
5. Client Assistance. You acknowledge that the services we provide under this Agreement are a cooperative process which may require the time and resources of your personnel. You agree to use all reasonable efforts to cooperate with and assist us as may be reasonably required to meet the agreed upon project deadlines and other milestones for the services. This cooperation includes at least working with us to schedule the services outlined in this Agreement and performing the Client responsibilities described in Exhibit D attached hereto. We will not be liable for failure to meet any deadlines and milestones when such failure is due to Force Majeure or to the failure by your personnel to provide such cooperation and assistance (either through action or omission).
6. Change in Legal Requirements. The parties acknowledge that the terms and conditions of this Agreement are based on the laws, rules and regulations as of the Effective Date. In the event any applicable laws, rules or regulations change so as to create additional work for us not provided for in this Agreement, Client shall allow us a reasonable extension of time to complete the services, and additional compensation as provided in Section C(3) below.
7. Background Checks. For at least the past twelve (12) years, all of our employees have undergone criminal background checks prior to hire. All employees sign our confidentiality agreement and security policies.

## **SECTION C – INVOICING AND PAYMENT; INVOICE DISPUTES**

1. Invoicing and Payment. We will invoice you the fees for the services as per our Invoicing and Payment Policy, subject to Section C(2).
2. Invoice Disputes. If you believe any delivered service does not conform to the warranties in this Agreement, you will provide us with written notice within fifteen (15) days of your receipt of the applicable invoice. The written notice must contain reasonable detail of the issues you contend are in dispute so that we can confirm the issue and respond to your notice with either a justification of

the invoice, an adjustment to the invoice, or a proposal addressing the issues presented in your notice. We will work with you as may be necessary to develop an action plan that outlines reasonable steps to be taken by each of us to resolve any issues presented in your notice. You may withhold payment of the amount(s) actually in dispute, and only those amounts, until we complete the action items outlined in the plan. If we are unable to complete the action items outlined in the action plan because of your failure to complete the items agreed to be done by you, then you will remit full payment of the invoice. We reserve the right to suspend delivery of all services if you fail to pay an invoice not disputed as described above within fifteen (15) days of notice of our intent to suspend services.

3. Additional Services. The Investment Summary contains the related costs required for the project based on our understanding of the specifications you supplied and of the laws, rules and regulations applicable to the project as of the Effective Date. If additional work is required, or if you use or request additional services, we will provide you with an addendum outlining the costs for the additional work. The price quotes in the addendum will be valid for thirty (30) days from date of issuance.

#### **SECTION D – TERM AND TERMINATION**

1. Term. This Agreement shall commence on the Effective Date and shall continue through \_\_\_\_\_. This Agreement may be renewed upon written mutual agreement of the parties.
2. Termination. This Agreement may be terminated as set forth below. In the event of termination, you will pay us for all undisputed fees and expenses related to the services you have received, or we have incurred or delivered, prior to the effective date of termination. Disputed fees and expenses in all terminations other than your termination for cause must have been submitted as invoice disputes in accordance with Section C(2).
  - 2.1. For Cause. If you believe we have materially breached this Agreement, you will invoke the Dispute Resolution clause set forth in Section F(2). You may terminate this Agreement for cause in the event we do not cure, or create a mutually agreeable action plan to address, a material breach of this Agreement within the thirty (30) day window set forth in Section F(2).
  - 2.2. Force Majeure. Either party has the right to terminate this Agreement if a Force Majeure event suspends performance of this Agreement for a period of forty-five (45) days or more.
  - 2.3. Lack of Appropriations. If you should not appropriate or otherwise receive funds sufficient to purchase the services set forth in this Agreement, you may unilaterally terminate this Agreement upon thirty (30) days written notice to us. You agree not to use termination for lack of appropriations as a substitute for termination for convenience.

#### **SECTION E – INDEMNIFICATION, LIMITATION OF LIABILITY AND INSURANCE**

1. Property Damage and Personal Injury Indemnification.
  - 1.1 We will indemnify and hold harmless you and your agents, officials, and employees from and against any and all third-party claims, losses, liabilities, damages, costs, and expenses (including reasonable attorney's fees and costs) for (a) personal injury or property damage to the extent caused by our negligence or willful misconduct; or (b) our violation of a law applicable to our

performance under this Agreement. You must notify us promptly in writing of the claim and give us sole control over its defense or settlement. You agree to provide us with reasonable assistance, cooperation, and information in defending the claim at our expense.

1.2 To the extent permitted by applicable law, you will indemnify and hold harmless us and our agents, officials, and employees from and against any and all third-party claims, losses, liabilities, damages, costs, and expenses (including reasonable attorney's fees and costs) for (a) personal injury or property damage to the extent caused by your negligence or willful misconduct; or (b) your violation of a law applicable to your performance under this Agreement. We will notify you promptly in writing of the claim and will give you sole control over its defense or settlement. We agree to provide you with reasonable assistance, cooperation, and information in defending the claim at your expense.

2. **DISCLAIMER.** EXCEPT FOR THE EXPRESS WARRANTIES PROVIDED IN THIS AGREEMENT AND TO THE MAXIMUM EXTENT PERMITTED BY APPLICABLE LAW, WE HEREBY DISCLAIM ALL OTHER WARRANTIES AND CONDITIONS, WHETHER EXPRESS, IMPLIED, OR STATUTORY, INCLUDING, BUT NOT LIMITED TO, ANY IMPLIED WARRANTIES, DUTIES, OR CONDITIONS OF MERCHANTABILITY OR FITNESS FOR A PARTICULAR PURPOSE.
3. **LIMITATION OF LIABILITY.** EXCEPT AS OTHERWISE EXPRESSLY SET FORTH IN THIS AGREEMENT, OUR LIABILITY FOR DAMAGES ARISING OUT OF THIS AGREEMENT, WHETHER BASED ON A THEORY OF CONTRACT OR TORT, INCLUDING NEGLIGENCE AND STRICT LIABILITY, SHALL BE LIMITED TO THE LESSER OF (A) YOUR ACTUAL DIRECT DAMAGES OR (B) THE AMOUNTS PAID BY YOU UNDER THIS AGREEMENT. THE PRICES SET FORTH IN THIS AGREEMENT ARE SET IN RELIANCE UPON THIS LIMITATION OF LIABILITY. THE FOREGOING LIMITATION OF LIABILITY SHALL NOT APPLY TO CLAIMS THAT ARE SUBJECT TO SECTION E(1.1) ABOVE.
4. **EXCLUSION OF CERTAIN DAMAGES.** TO THE MAXIMUM EXTENT PERMITTED BY APPLICABLE LAW, IN NO EVENT SHALL WE BE LIABLE FOR ANY SPECIAL, INCIDENTAL, PUNITIVE, INDIRECT, OR CONSEQUENTIAL DAMAGES WHATSOEVER, INCLUDING BUT NOT LIMITED TO LOSS OF TAX REVENUE OR CLAIMS RELATED TO VALUATION OF PROPERTY, EVEN IF WE HAVE BEEN ADVISED OF THE POSSIBILITY OF SUCH DAMAGES.
5. **Insurance.** During the course of performing services under this Agreement, we agree to maintain the following levels of insurance: (a) Commercial General Liability of at least \$1,000,000; (b) Automobile Liability of at least \$1,000,000; (c) Professional Liability of at least \$1,000,000; (d) Workers Compensation complying with applicable statutory requirements; and (e) Excess/Umbrella Liability of at least \$5,000,000. We will add you as an additional insured to our Commercial General Liability and Automobile Liability policies, which will automatically add you as an additional insured to our Excess/Umbrella Liability policy as well. We will provide you with copies of certificates of insurance upon your written request.

## **SECTION F – GENERAL TERMS AND CONDITIONS**

1. **Additional Services.** You may purchase additional services at our then-current list price by executing a mutually agreed addendum. The terms of this Agreement will control any such additional purchase(s), unless otherwise specifically provided in the addendum.

2. Dispute Resolution. You agree to provide us with written notice within thirty (30) days of becoming aware of a dispute. You agree to cooperate with us in trying to reasonably resolve all disputes, including, if requested by either party, appointing a senior representative to meet and engage in good faith negotiations with our appointed senior representative. Senior representatives will convene within thirty (30) days of the written dispute notice, unless otherwise agreed. All meetings and discussions between senior representatives will be deemed confidential settlement discussions not subject to disclosure under Federal Rule of Evidence 408 or any similar applicable state rule. If we fail to resolve the dispute, then the parties shall participate in non-binding mediation in an effort to resolve the dispute. If the dispute remains unresolved after mediation, then either of us may assert our respective rights and remedies in a court of competent jurisdiction. Nothing in this section shall prevent you or us from seeking necessary injunctive relief during the dispute resolution.
3. Taxes. The fees in the Investment Summary do not include any taxes, including, without limitation, sales, use, or excise tax. If you are a tax-exempt entity, you agree to provide us with a tax-exempt certificate. Otherwise, we will pay all applicable taxes to the proper authorities and you will reimburse us for such taxes. If you have a valid direct-pay permit, you agree to provide us with a copy. For clarity, we are responsible for paying our income taxes arising from our performance of this Agreement.
4. Nondiscrimination. We will not discriminate against any person employed or applying for employment concerning the performance of our responsibilities under this Agreement. This discrimination prohibition will apply to all matters of initial employment, tenure, and terms of employment, or otherwise with respect to any matter directly or indirectly relating to employment concerning race, color, religion, national origin, age, sex, sexual orientation, ancestry, disability that is unrelated to the individual's ability to perform the duties of a particular job or position, height, weight, marital status, or political affiliation. We will post, where appropriate, all notices related to nondiscrimination as may be required by applicable law.
5. E-Verify. We have complied, and will comply, with the E-Verify procedures administered by the U.S. Citizenship and Immigration Services Verification Division for all of our employees assigned to your project.
6. Subcontractors. We will not subcontract any services under this Agreement without your prior written consent, not to be unreasonably withheld.
7. Binding Effect; No Assignment. This Agreement shall be binding on, and shall be for the benefit of, either your or our successor(s) or permitted assign(s). Neither party may assign this Agreement without the prior written consent of the other party; provided, however, your consent is not required for an assignment by us as a result of a corporate reorganization, merger, acquisition, or purchase of substantially all of our assets.
8. Force Majeure. Except for your payment obligations, neither party will be liable for delays in performing its obligations under this Agreement to the extent that the delay is caused by Force Majeure; provided, however, that within ten (10) business days of the Force Majeure event, the party whose performance is delayed provides the other party with written notice explaining the cause and extent thereof, as well as a request for a reasonable time extension equal to the estimated duration of the Force Majeure event.



9. No Intended Third Party Beneficiaries. This Agreement is entered into solely for the benefit of you and us. No third party will be deemed a beneficiary of this Agreement, and no third party will have the right to make any claim or assert any right under this Agreement.
10. Purpose/Use of Appraisals. By virtue of this Agreement, we are contracted to provide certain services specified herein and recommendations of value to you which are intended for exclusive use by you for determinations of assessment for ad valorem tax purposes. Any use other than that stated above is not authorized nor intended, and most specifically excluded is an opinion of value used for federally related real estate transactions or other mortgage purposes.
11. Entire Agreement; Amendment. This Agreement represents the entire agreement between you and us with respect to the subject matter hereof, and supersedes any prior agreements, understandings, and representations, whether written, oral, expressed, implied, or statutory. Purchase orders submitted by you, if any, are for your internal administrative purposes only, and the terms and conditions contained in those purchase orders will have no force or effect. This Agreement may only be modified by a written amendment signed by an authorized representative of each party.
12. Severability. If any term or provision of this Agreement is held invalid or unenforceable, the remainder of this Agreement will be considered valid and enforceable to the fullest extent permitted by law.
13. No Waiver. In the event that the terms and conditions of this Agreement are not strictly enforced by either party, such non-enforcement will not act as or be deemed to act as a waiver or modification of this Agreement, nor will such non-enforcement prevent such party from enforcing each and every term of this Agreement thereafter.
14. Independent Contractor. We are an independent contractor for all purposes under this Agreement.
15. Notices. All notices or communications required or permitted as a part of this Agreement, such as notice of an alleged material breach for a termination for cause or a dispute that must be submitted to dispute resolution, must be in writing and will be deemed delivered upon the earlier of the following: (a) actual receipt by the receiving party; (b) upon receipt by sender of a certified mail, return receipt signed by an employee or agent of the receiving party; (c) upon receipt by sender of proof of email delivery; or (d) if not actually received, five (5) days after deposit with the United States Postal Service authorized mail center with proper postage (certified mail, return receipt requested) affixed and addressed to the other party at the address set forth on the signature page hereto or such other address as the party may have designated by proper notice. The consequences for the failure to receive a notice due to improper notification by the intended receiving party of a change in address will be borne by the intended receiving party.
16. Client Lists. You agree that we may identify you by name in client lists, marketing presentations, and promotional materials.
17. Confidentiality. Both parties recognize that their respective employees and agents, in the course of performance of this Agreement, may be exposed to confidential information and that disclosure of such information could violate rights to private individuals and entities, including the parties. Confidential information is nonpublic information that a reasonable person would believe to be confidential and includes, without limitation, personal identifying information (e.g., social security numbers) and trade secrets, each as defined by applicable state law. Each party agrees that it will not

disclose any confidential information of the other party and further agrees to take all reasonable and appropriate action to prevent such disclosure by its employees or agents. The confidentiality covenants contained herein will survive the termination or cancellation of this Agreement. This obligation of confidentiality will not apply to information that:

- (a) is in the public domain, either at the time of disclosure or afterwards, except by breach of this Agreement by a party or its employees or agents;
- (b) a party can establish by reasonable proof was in that party's possession at the time of initial disclosure;
- (c) a party receives from a third party who has a right to disclose it to the receiving party; or
- (d) is the subject of a legitimate disclosure request under the open records laws or similar applicable public disclosure laws governing this Agreement; provided, however, that in the event you receive an open records or other similar applicable request, you will give us prompt notice and otherwise perform the functions required by applicable law.

18. Business License. In the event a local business license is required for us to perform services hereunder, you will promptly notify us and provide us with the necessary paperwork and/or contact information so that we may timely obtain such license.

19. Governing Law. This Agreement will be governed by and construed in accordance with the laws of your state of domicile.

20. Multiple Originals and Authorized Signatures. This Agreement may be executed in multiple originals, any of which will be independently treated as an original document. Any electronic, faxed, scanned, photocopied, or similarly reproduced signature on this Agreement or any amendment hereto will be deemed an original signature and will be fully enforceable as if an original signature. Each party represents to the other that the signatory set forth below is duly authorized to bind that party to this Agreement.

21. Limited License Grant and Restrictions [if applicable].

- a. We grant to you a limited license to use Tyler's \_\_\_\_\_ software for your internal business purposes only as described in Exhibit C - Statement of Work. Your rights to use the Tyler's \_\_\_\_\_ software may be revoked at any time if you do not comply with the terms of this Agreement. You agree to return Tyler's \_\_\_\_\_ software to Tyler, and all copies thereof, upon the termination of this Agreement.
- b. The Documentation is licensed to you and may be used and copied by your employees for internal, non-commercial reference purposes only. Documentation means any online or written documentation related to the use or functionality of Tyler's \_\_\_\_\_ software that we provide or otherwise make available to you, including instructions, user guides, manuals and other training or self-help documentation.
- c. You may not: (a) transfer or assign Tyler's \_\_\_\_\_ software to a third party; (b) reverse engineer, decompile, or disassemble Tyler's \_\_\_\_\_ software; (c) rent, lease, lend, or provide commercial hosting services with Tyler's \_\_\_\_\_ software; or (d) publish or otherwise disclose Tyler's \_\_\_\_\_ software or Documentation to third parties.



d. We reserve all rights not expressly granted to you in this Agreement. Tyler's \_\_\_\_\_ software and Documentation are protected by copyright and other intellectual property laws and treaties. We own the title, copyright, and other intellectual property rights in Tyler's \_\_\_\_\_ software and the Documentation. **Tyler's \_\_\_\_\_ software is licensed, not sold.** Your right to access or use Tyler's \_\_\_\_\_ software will terminate on \_\_\_\_\_.

22. **Performance Bond [if applicable].** Tyler will secure a performance bond ("Bond") within ten (10) business days after execution of this Agreement in the face amount of \_\_\_\_\_. The initial term of the Bond is twenty-four (24) months.

23. **Contract Documents.** This Agreement includes the following exhibits:

- |           |                              |
|-----------|------------------------------|
| Exhibit A | Investment Summary           |
| Exhibit B | Invoicing and Payment Policy |
| Exhibit C | Statement of Work            |
| Exhibit D | Client Responsibilities      |

IN WITNESS WHEREOF, a duly authorized representative of each party has executed this Agreement as of the date(s) set forth below.

Tyler Technologies, Inc.

[INSERT CLIENT NAME]

By: \_\_\_\_\_

By: \_\_\_\_\_

Name: \_\_\_\_\_

Name: \_\_\_\_\_

Title: \_\_\_\_\_

Title: \_\_\_\_\_

Date: \_\_\_\_\_

Date: \_\_\_\_\_

Address for Notices:

Tyler Technologies, Inc.  
One Tyler Way  
Moraine, OH 45439  
Attention: VP & GM, Appraisal Services

Address for Notices:

[INSERT CLIENT NAME]  
[INSERT CLIENT ADDRESS]  
[INSERT CLIENT ADDRESS]  
Attention: \_\_\_\_\_



## **Exhibit A Investment Summary**

The following Investment Summary details the services to be delivered by Tyler to Client under this Agreement. This Investment Summary is effective as of the Effective Date, despite any expiration date in the Investment Summary that may have lapsed as of the Effective Date. Capitalized terms not otherwise defined will have the meaning assigned to such terms in your Agreement.

*Tyler sales quotation to be inserted prior to Agreement execution.*

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## **Exhibit B Invoicing and Payment Policy**

Tyler will provide you with the services set forth in the Investment Summary and Statement of Work. Capitalized terms not otherwise defined will have the meaning assigned to such terms in your Agreement.

**Invoicing**: We will invoice you for the applicable services and for the fees described in the Investment Summary as set forth below. Your rights to dispute any invoice are set forth in your Agreement.

1. **Professional Services**.

All professional services performed under this Agreement will be invoiced as performed.

2. **Expenses**. The service fees in the Investment Summary include travel expenses.

**Payment**. Payment for undisputed invoices is due within forty-five (45) days of the invoice date.

We prefer to receive payments electronically. Our electronic payment information is available by contacting [AR@tylertech.com](mailto:AR@tylertech.com).



**Exhibit C**  
**Statement of Work**

The following Statement of Work details the services to be delivered by Tyler to the Client under your Agreement. This Statement of Work is effective as of the Effective Date. Capitalized terms not otherwise defined will have the meaning assigned to such terms in your Agreement.

*Statement of Work to be inserted prior to Agreement execution.*

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**Exhibit D**  
**Client Responsibilities**

The following Client Responsibilities details the responsibilities of the Client under your Agreement. These Client Responsibilities are effective as of the Effective Date. Capitalized terms not otherwise defined will have the meaning assigned to such terms in your Agreement.

*Client Responsibilities to be inserted prior to Agreement execution.*

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# CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)

06/21/2024

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

**IMPORTANT:** If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

<b>PRODUCER</b> MARSH USA, LLC. 99 HIGH STREET BOSTON, MA 02110  CN102891976-GAWXC-GAWXC-24	<b>CONTACT NAME:</b> ...	
	<b>PHONE (A/C. No. Ext):</b>	<b>FAX (A/C. No):</b>
<b>E-MAIL ADDRESS:</b>		
<b>INSURER(S) AFFORDING COVERAGE</b>		<b>NAIC #</b>
<b>INSURER A:</b> Hartford Fire Insurance Company		19682
<b>INSURER B:</b> Trumbull Insurance Company		27120
<b>INSURER C:</b> Hartford Casualty Insurance Company		29424
<b>INSURER D:</b> The Hartford		19682
<b>INSURER E:</b> OBE Specialty Insurance Company		11515
<b>INSURER F:</b>		

**COVERAGES**

CERTIFICATE NUMBER:

NYC-011495459-12

REVISION NUMBER: 4

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS	
A	<input checked="" type="checkbox"/> <b>COMMERCIAL GENERAL LIABILITY</b> <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR  GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC OTHER:			10UENBA4DHY	04/01/2024	04/01/2025	EACH OCCURRENCE	\$ 1,000,000
							DAMAGE TO RENTED PREMISES (Ea occurrence)	\$ 1,000,000
							MED EXP (Any one person)	\$ 10,000
							PERSONAL & ADV INJURY	\$ 1,000,000
							GENERAL AGGREGATE	\$ 2,000,000
							PRODUCTS - COMP/OP AGG	\$ 2,000,000
								\$
B	<input checked="" type="checkbox"/> <b>AUTOMOBILE LIABILITY</b> <input checked="" type="checkbox"/> ANY AUTO <input type="checkbox"/> OWNED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS <input type="checkbox"/> HIRED AUTOS ONLY <input type="checkbox"/> NON-OWNED AUTOS ONLY			10 UEN DI9897	04/01/2024	04/01/2025	COMBINED SINGLE LIMIT (Ea accident)	\$ 1,000,000
							BODILY INJURY (Per person)	\$
							BODILY INJURY (Per accident)	\$
							PROPERTY DAMAGE (Per accident)	\$
								\$
C	<input checked="" type="checkbox"/> <b>UMBRELLA LIAB</b> <input checked="" type="checkbox"/> OCCUR <input type="checkbox"/> EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE <input type="checkbox"/> DED <input checked="" type="checkbox"/> RETENTION \$ 10,000			10XHUBC1DGX	04/01/2024	04/01/2025	EACH OCCURRENCE	\$ 25,000,000
							AGGREGATE	\$ 25,000,000
								\$
D	<b>WORKERS COMPENSATION AND EMPLOYERS' LIABILITY</b> ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? <input checked="" type="checkbox"/> Y <input checked="" type="checkbox"/> N (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below		N/A	10WNS88300	04/01/2024	04/01/2025	<input checked="" type="checkbox"/> PER STATUTE <input type="checkbox"/> OTHER	
							E.L. EACH ACCIDENT	\$ 1,000,000
							E.L. DISEASE - EA EMPLOYEE	\$ 1,000,000
							E.L. DISEASE - POLICY LIMIT	\$ 1,000,000
E	Professional Liability/Cyber			130001996	06/17/2024	06/17/2025	Limit:	\$ 5,000,000

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

Evidence Only

**CERTIFICATE HOLDER****CANCELLATION**

Tyler Technologies 5101 Tennyson Parkway Plano, TX 75024	SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.  AUTHORIZED REPRESENTATIVE  <i>Marsh USA LLC</i>
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**ADDITIONAL REMARKS SCHEDULE**

<b>AGENCY</b> MARSH USA, LLC.		<b>NAMED INSURED</b> Tyler Technologies, Inc. 5101 Tennyson Parkway Plano, TX 75024	
<b>POLICY NUMBER</b>		<b>EFFECTIVE DATE:</b>	
<b>CARRIER</b>	<b>NAIC CODE</b>		

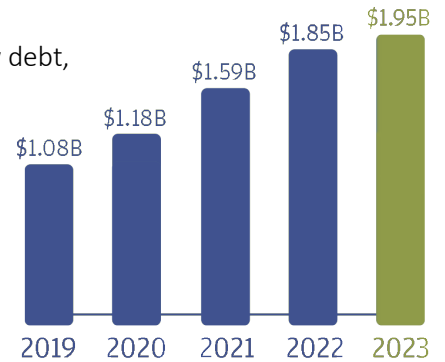
**ADDITIONAL REMARKS**

**THIS ADDITIONAL REMARKS FORM IS A SCHEDULE TO ACORD FORM,**  
**FORM NUMBER:** 25 **FORM TITLE:** Certificate of Liability Insurance

The Professional Liability / Cyber policies evidenced contain Self Insured Retentions to various perils covered. If you would like additional information regarding these sub limits or deductibles, please contact the insured.

## Appendix: Financial Stability & 2030 Vision

Tyler consistently maintains a solid balance sheet and strong cash flow and low debt, experiencing consistent revenue growth with 41 consecutive quarters of profitability, and a total revenue for 2023 of \$1.95 billion. While experiencing significant growth opportunities from an increase in staff and expanding territories, we anticipate additional product offerings and innovative technology will accelerate this growth in the future. We believe a low-debt balance sheet, substantial cash reserves, and a committed customer base put Tyler in a great position in our industry to weather any unexpected turbulence in the economy.



For additional revenue information on Tyler’s annual report for 2012 to current. [investors.tylertech.com](https://investors.tylertech.com)

### 2023 Highlights

We achieved our key objectives for the year and total revenues reached \$1.95 billion, representing 7.4% year-over-year organic growth. Our performance demonstrates the strength of our strategic plan as both new and existing clients continue to express a preference for the long-term benefits of cloud technology. In fact, our annual SaaS revenues surpassed our combined license and maintenance revenues for the first time in 2023. Our focus on cloud optimization and transitioning on-premises clients to the cloud set the stage for operating efficiencies as we invested in innovation, client success, and talent development to fuel our long-term growth. We expect that the financial benefits and operating leverage from our cloud transition will result in a return to a trajectory of operating margin expansion in 2024.

**\$1.95 billion**  
2023 Total Revenue

Recurring revenues grew 9.5%, organically, and comprised 83% of our total revenues. SaaS revenues increased 23.1% on an organic basis, exceeding our near-term expectations of a 20% CAGR in SaaS revenues through 2025. Additionally, SaaS arrangements comprised approximately 85% of total new software contract value, reflecting greater cloud adoption across our public sector clients. We are pleased with our increased profitability in 2023, with GAAP net income for the year of \$165.9 million, or \$3.88 per diluted share, up 1.0%. Non-GAAP net income was \$333.7 million, or \$7.80 per diluted share, up 4.9% compared to 2022. Free cash flow was strong at \$327.4 million, even after paying approximately \$127 million of cash taxes related to IRC Section 174 capitalization rules. We’re pleased with our results in a year that was pivotal to our cloud transition.

**9.5%**  
YoY Revenue Growth

### Tyler 2030 Vision

During our June 2023 investor day, we introduced our Tyler 2030 vision, which supports our drive to be the most trusted and indispensable partner for the public sector in the digital government era. I like to describe Tyler 2030 as our “True North” as we deliver sustainable growth and margin expansion over the next decade. This vision becomes a reality when we continue to focus on what’s most important. Tyler 2030 aligns our organization and drives focus areas including leveraging our large installed base, expanding into new markets, completing our cloud transition, and growing our payments business. We will achieve these goals while building a world-class corporate culture maintained by the best and brightest employees in the industry.