



**Christopher A. Galloway**  
**Lake County Auditor**  
[www.lakecountyohio.gov](http://www.lakecountyohio.gov)

Lake County Administration Center  
105 Main Street • P.O. Box 490  
Painesville, Ohio 44077-0490

440.350.2532  
440.428.4348  
440.918.2500  
Fax 440.350.2667

**MEMORANDUM**

TO: Jason Boyd, County Administrator  
FROM: Michele Pennell, Chief Deputy Auditor *MP*  
DATE: October 22, 2020  
RE: Tyler Technologies



Please accept the attached contract as request to open a purchase order with Tyler Technologies in the Real Estate Assessment (REA) Contract Services Account, 26606661-635, for the 2021 Triennial services in the Auditor's office in the amount not to exceed \$43,800.00.

The Prosecutors have approved the contract and we are looking for Commissioner approval at this time.

If you have question, please feel free to contact me at 440-350-2618 or [mpennell@lakecountyohio.gov](mailto:mpennell@lakecountyohio.gov).

Thank you for your consideration.

*No Res.  
put to seal*

*10.23.20*

**APPROVED**  
Commissioners *Jan R. Hawk*  
PRESIDENT  
*RE [Signature]*  
of *[Signature]*  
Lake County, Ohio  
Attest *[Signature]*  
CLERK *10-29-20*

## Statement of Work

### Direction of the Triennial Program

In the appraisal and valuation of the properties covered by this Agreement, the Auditor shall act and serve as Appraiser-in-Chief. All final decisions as to assessed valuations and procedures to be followed shall be made by the Auditor. Tyler agrees that the appraisers, reviewers, and field representatives employed by Tyler are subject to the Auditor's approval. Those approved employees shall be appointed deputies of the Auditor and are not County employees.

### Company Responsibilities

#### 1. General

- a. It is agreed that the work to be performed in this Agreement is for Triennial Update maintenance of the 2021 tax duplicate. This work is in no way connected with a complete revaluation of the County or New Construction activities that may or may not be in progress. This Triennial Update will include all real property within the County for ad valorem tax purposes which includes residential, agricultural, manufactured/mobile homes taxed like real property, commercial properties, industrial properties, including utility company improvements, tax exempt and/or abated properties and any TIF parcels in categories above.
- b. Confidentiality of Appraisal Data: Tyler will take steps to assure that no employee will disclose any appraisal information to any individual, firm or organization. Any data intended for public or private release will be provided to the Auditor for release.
- c. Project Schedule/Status Report: Tyler will provide to the County a project schedule listing the activities to take place during the project. Tyler will submit a monthly status report to the Auditor throughout the duration of this Agreement, and, as determined and requested by the Tax Commissioner, Tyler will also provide progress reports to the Tax Commissioner on D.T.E. form 108 pursuant to O.A.C. 5703-25-08(F)(10). In addition, Tyler will meet with the Auditor's staff as requested for project updates.
- d. Project Personnel: The project shall be performed by Tyler personnel working under the direct supervision of Designated Qualified Project Manager Eric Coakley and supported by Tyler's general staff and facilities. The Designated Qualified Project Manager's certificate is attached to this Agreement as Schedule 1 to Exhibit C.
- e. Support of Values - (Formal Review): At the County's request, Tyler shall participate in appeals taken and processed in accordance with administrative or statutory procedures from any individual assessment which is computed directly from Tyler's appraised value established under this Agreement provided that the first state of the appeal has commenced within the time allowed by Section 5715.19 of the Ohio Revised Code.

Within ten (10) days after filing of a notice of appeal from a decision of the County Board of Revision in any valuation complaint, Tyler or individual appraiser shall be notified by the Auditor that such notice has been filed and Tyler shall see that a competent witness is well prepared to give proper evidence and testimony at such time as the appeal is heard from either the Board of Tax Appeals (R.C. 5717.01) or the Court of Common Pleas (R.C. 5717.05). The witness must be one who can qualify as an expert and who has personally inspected the property in litigation and has made his/her independent written appraisal thereof. Any services for support of values before the County Board of Revision shall be provided by a responsible and competent employee of Tyler.

The County shall give Tyler copies of all documents involved in any complaint or appeal, and 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. Tyler has not included any person workdays for support of values involving the County Board of Revision. If County requests such services, such services can be provided at a fee of SIX HUNDRED DOLLARS (\$600) per eight (8) hour person workday. A workday is defined as each day spent on actual meetings with the Board of Revision, Board of Tax Appeals, or the Court of Common Pleas including testifying, preparation, field checks, and travel time.

## 2. Appraisal

- a. Work Product Deliverables: Tyler will deliver the following to the Auditor:
  - i. Documentation of procedures used throughout the Project.
  - ii. Sales Ratio Report, on or before June 1, 2021.
  - iii. Updated cost tables, on or before June 1, 2021, as encoded on County CAMA system.
  - iv. Neighborhood established codes and delineation listing by June 1, 2021.
  - v. County abstract of tentative values completed June 1, 2021.
  - vi. Any and all training materials and training manuals used to train the Auditor's staff.
- b. Sales Comparison: Tyler will compare sales with like properties. Tyler will verify sales data from the years of 2018, 2019 and 2020. Validated sales which are 10% greater or 10% less than market value will be reviewed. Based upon the sales review all classes of property values will be adjusted and submitted to DTE for approval.
- c. Neighborhood: Tyler will analyze the accuracy of neighborhood boundaries and make changes when necessary with the approval of the Auditor.



- d. DTE Approval Meeting/Triennial Report: Tyler will provide Advisory Counsel during meetings/negotiations with the DTE. Tyler will prepare the necessary report describing the percentage of increase/decrease by class for each neighborhood located in the County. This report will be used for the meeting with the DTE for final approval of the suggested increase/decrease of values.
- e. Percentage Adjustments: Tyler will be responsible for encoding and modifying the County's Neighborhood and Cost Tables that are necessary for calculating new values.
- f. File creation of 2099 including CAMA Tables and CAMA setup revaluation files and roll 2021 to 2099.