

Attachment K  
RFP#: 26-85175  
Scope of Work

**I. Continuing Education for Level I, Level II, and Level III Certified Assessor-Appraisers**

A. The Contractor shall provide continuing education to assessing officials, their designees, and other members of the assessment community, including property tax representatives and Contractors. The continuing education classes are offered on a quarterly basis, with each quarterly session covering a different subject matter.

B. Format of course offerings

1. Courses are to be offered virtually using a virtual meeting software chosen by the Contractor.
2. Course instruction should be held in seven and one-half (7.5) hour sessions per day.
3. The typical class size should be approximately fifty (50) students, subject to any limitations due to the virtual meeting software used. To ensure a conducive learning environment, class size shall be limited to a maximum of seventy-five (75) students.
  - a. Depending on the course material, the Contractor may limit the class size.
  - b. Due to class size restrictions, multiple sessions of the courses may have to be offered.
4. Unless specified on the registration, courses start at 8:30 a.m. and adjourn at 4:00 p.m. local time. Course registration/sign-in should take place from 8:00-8:30 a.m. After the course has adjourned, students will need to sign-out to receive credit for attending.
5. Classroom teaching is not restricted to a lecture format. However, there will be no exams or testing of the course material.
6. Continuing education classes are typically scheduled so as not to conflict with Indiana County Assessor Association conferences (typically held in mid-to-late January and late summer).

C. Location of course offerings and use of virtual methods

1. Contractor shall offer four (4) live virtual sessions in a calendar year. No more than one (1) live course session should be offered in a quarter. Contractor must record this live session and re-broadcast the recorded course session no

more than one (1) additional time in each quarter. Contractor must make available recorded virtual course sessions for this quarter on an online video media hosting platform. The topic for each course session shall be determined by the Contractor in consultation with the State and shall differ from the topic presented in all other quarters.

2. The Contractor may use any virtual meeting software, provided that the software must be conducive to a learning environment, including but not limited to allowing interaction between lecturer and attendants. The cost of the virtual meeting software (if any) is the responsibility of the Contractor.
3. Any costs for having recorded sessions hosted on a platform shall be the responsibility of the Contractor.
4. The total number of live sessions offered annually may not exceed four (4) and the total number of virtual courses offered annually, both live and re-broadcast, may not exceed eight (8).

D. With respect to course planning and preparation, Contractor shall:

1. Work with the State staff, select, prepare, and teach continuing education classes. This includes submission and approval of all course work by the State prior to the class instruction.
  - a. Contractor shall submit course work and dates to the State no later than August 1, for courses to be held in each quarter of that fiscal year. For example, for the fiscal year beginning July 1, 2026, Contractor shall submit course work and dates to the State no later than August 1, 2026.
  - b. Class instruction shall begin no later than September 1.
2. Prepare and supply course materials to class participants.
3. Prepare, distribute and process registration materials. Advertising/notification of course offerings and registrations will be done electronically.
  - a. All students shall be registered at least one (1) week prior to the teaching of the course.
  - b. Registration reservations shall be accepted by an online registration service chosen by the Contractor after consultation with the State.
4. Maintain the list of attendees (class lists), provided to the State in an electronic format. Contractor shall provide the State with a class list for each course no later than ten (10) days after completion of each course.

- E. If legislation is passed that affects the assessing community or continuing education requirements, the contract may be modified.
- F. Should any course have to be cancelled, the following shall apply:
  - 1. If a class is cancelled due to technical difficulties with the virtual meeting software or an instructor emergency, the Contractor shall reschedule the class. The Contractor shall notify the State the same day a class session is cancelled. The Contractor shall offer the cancelled class on another date.
  - 2. If a class is cancelled due to low or no enrollment, the Contractor shall not reschedule the class. The Contractor shall determine whether the class session will be cancelled due to low or no enrollment no later than fifteen (15) business days before the class session is to be conducted. The Contractor shall notify the State no later than fifteen (15) business days before the class session is to be conducted. For purposes of this provision, both the State and Contractor consider low or no enrollment to be fewer than ten (10) individuals registered for a class session as of fifteen (15) business days before the class session is to be conducted. Because of the cancellation of the class, the obligation of the Contractor to re-broadcast the recorded session for that quarter is waived with respect to the cancelled class.

## **II. Training for Level III Assessor-Appraiser Certification**

- A. In each year, Contractor shall schedule and teach the following five (5) International Association of Assessing Officers (“IAAO”) courses:
  - 1. Course 101: Fundamentals of Real Property Appraisal.
  - 2. Course 102: Income Approach to Value.
  - 3. Course 300: Fundamentals of Mass Appraisal.
  - 4. Course 400: Assessment Administration.
  - 5. USPAP Workshop 151.
- B. Contractor shall maintain a license agreement with the IAAO to provide the courses described in Paragraph A.
- C. Contractor shall offer the courses described in Paragraph A in-person at locations in the Northern, Southern, and Central regions in Indiana. Contractor shall consult with the State as to the courses to be offered and each location where the course is to be conducted. At least one (1) of the courses shall be offered in each of the Northern, Southern, and Central regions. More than one (1) course may be offered in any region. However, no more than four (4) courses shall be conducted in a year under this Paragraph. In addition, only one (1) course shall be offered per quarter.

D. During both of the conferences of the Indiana County Assessors Association that are held in a year, Contractor shall offer any of the courses listed in Paragraph A as determined by the State in consultation with the Association.


1. No more than two (2) courses shall be offered and held during the conferences in a year under this Paragraph, provided that no more than two (2) conferences are held in that year.
2. The State shall notify the Contractor of the course offerings determined by the State and Association no later than thirty (30) days before the Monday of the week in which the conference is held.
3. If the State is unable to come to an agreement with the Association on the course offerings, the State and Contractor shall make that determination no later than thirty (30) days before the Monday of the week in which the conference is held.
4. Location of the courses held during the Association conferences shall be as follows:
  - a. If the conference is to be located in an area outside the City of Indianapolis, at a location determined by the Contractor in consultation with the Association.
  - b. If the conference is to be located in the City of Indianapolis, at the
    1. Indiana Government Center, 200 West Washington Street, Indianapolis, Indiana, or
    2. another facility owned by the state or a state educational institution, available for public access and use, suitable for a classroom environment, and that is proximate to the location of the conference.

G. The Contractor shall offer no more than six (6) courses under this section in a year, combining the courses offered at various regions in Indiana under Paragraph C and at the Association conferences under Paragraph D. A course may be offered more than once in a year, but each course shall be offered at least once in a year.

H. Except where consultation with the Association is required, the Contractor shall have the sole responsibility for selecting the location and facilities for the course sessions and shall bear all expenses related to reserving and leasing the facilities for classroom instruction. The State shall not be liable for any costs incurred with respect to facility use. Neither the State nor the Contractor shall be responsible for any incidental charges incurred by course attendees, such as lodging or meals.

- I. Contractor shall handle all aspects of conducting a course, including designating classrooms and locations, providing course materials and providing instructors. The State, however, may qualify any instructor, but only upon reasonable notice to Contractor and after consultation with Contractor.
- J. Each course shall be taught to a maximum of fifty (50) students. The total number of enrolled students for all courses that are conducted per year shall not exceed one hundred forty (140). If a course has fewer than twenty (20) students registered as of fifteen (15) days before the class session is scheduled, the Contractor may cancel the class session after consultation with the State. The Contractor shall notify the State the same day a class session is cancelled. In the event a class is cancelled, the Contractor may offer the cancelled class on another date at the same or other location. In any event, the total number of classes conducted per year shall not exceed seven (7).
- K. Contractor shall provide a proposed schedule of courses, including locations and dates, to the State no later than July 1. Class instruction shall begin no later than the immediately succeeding August 1.
- L. The Contractor shall conduct all phases of registration, including but not limited, to distribution of course offerings to potential registrants. Advertising/notification of course offerings will be done electronically. Priority registration will be given to no more than two (2) registrants from each county assessor's office and the thirteen (13) township assessors. The Contractor shall inform the State on a weekly basis as to the status and number of registrants per course. The State shall notify state, county, and township assessing officials and state employees of the availability of the course offerings, proposed schedules of courses, including but not limited to information on dates, location, and cost.

### III. General Support and Management

- A. Contractor shall provide general and technical support to people, including potential registrants, registrants, and instructors. This includes but is not limited to
  - 1. correspondence about course offerings.
  - 2. assistance with course registration.
  - 3. providing and delivery of materials.
  - 4. maintenance of online registration system.
  - 5. technical support of virtual meeting software; and
  - 6. maintenance of student registration data.
- B. To the extent possible, any correspondence,  and delivery of materials should be made electronically.

### IV. Invoicing

- A. Contractor shall provide the State with an invoice for payment such that the services described in Sections II and III of this scope of work are combined in one (1) invoice. However, Contractor may provide the State with any invoice for reimbursement to the Association when available.
- B. No later than thirty (30) days after the end of the First, Second, and Third Quarter, Contractor shall provide the State with an invoice for services rendered in that quarter.
- C. For the Fourth Quarter, Contractor shall provide the State with an invoice for services rendered no later than June 30.