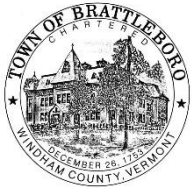


Request For Proposal
Appraisal Services for Town-Wide Reappraisal
August 15, 2022



Issued: August 15, 2022
Due: September 15, 2022 at 10:00AM

Submit Proposal to:
Jenepher Burnell Town Assessor
Town of Brattleboro - 230 Main Street
Suite 109 - Brattleboro, VT 05301
(802) 251-8156



Brattleboro Office of Assessment

230 Main Street, Suite 109 • Brattleboro, VT 05301 (802) 251 - 8156
ww.brattleboro.org

REQUEST FOR PROPOSAL
FOR APPRAISAL SERVICES FOR
TOWN-WIDE REAPPRAISAL OF ALL REAL PROPERTY
Issued: August 15, 2022 ~ Due: September 15, 2022

The Town of Brattleboro is requesting a qualified, certified licensed reappraisal contractor to work in conjunction with the Brattleboro Assessors to complete a town-wide reappraisal of all real property within Brattleboro.

PDF of the proposals must be submitted via email with the subject line “Reappraisal Services” by 10:00 a.m. September 15, 2022 to:

Jenepher Burnell, Town Assessor
Town of Brattleboro
jburnell@brattleboro.org

An email confirmation will be sent when the proposal is received. Proposals may include links to additional materials, but inclusion of lengthy supporting documents is strongly discouraged. Proposals received after that date and time will be rejected.

Questions must be emailed to Jenepher Burnell at jburnell@brattleboro.org. All questions and responses will be posted on the Town’s website at: Brattleboro.org/Reap RFP/.

Each bidder shall honor the bid price for ninety (90) business days from the date of the bid opening, without modification. Upon award of the bid, the winning bidder shall be bound by the bid proposal price throughout the contract period. Bid materials become the property of the Town.

The Town of Brattleboro reserves the right to reject any, or any part of, or all bid proposals; and to accept that bid which the Town of Brattleboro deems to be in the best interest of the Town of Brattleboro.

Jenepher Burnell, Town Assessor

General Information

The town of Brattleboro is located along the Connecticut River with I91 running along the eastern edge bordering NH, home to the Brattleboro Retreat, Winston Prouty campus and The Retreat Farm. The Town is a mix of land uses consisting of Residential, Commercial, Industrial, Agriculture, Woodland properties, and a fair amount of conservation land with 106 parcels enrolled in the State's Use Value Appraisal program. The housing is made up of single family, duplex and multi-family, condominiums, commercial apartments and less than a dozen seasonal structures.

The Town currently contracts with ProVal for our Computer Assisted Mass Appraisal software. The Assessor's office is investigating other CAMA software programs. The last Town-Wide reappraisal was completed for the 2010 Grand List. There has not been a Partial nor a Statistical Reappraisal in the interim.

Taxable parcel breakdown as of April 1, 2022: See Attached 411 FORM

Description of Project

The reappraisal project shall involve development of new land schedules and neighborhood delineations to estimate land values for every site in town, collection and analysis of income and expense information and market rental data to update the income approach for commercial and industrial properties, detailed analysis of residential sales over a three year period to develop direct sales comparison and Multiple Regression Analysis (MRA) approaches as well as formulating accurate, localized cost and depreciation schedules to develop a cost approach for all types of properties.

The Town currently uses ProVal CAMA software which the Contractor will utilize. However, the Assessors are open to the possibility of switching to a different CAMA software program. The reappraisal project will be completed with software capable of integrating with the new Axiomatic Grand List software (VTPIE). The system must provide extensive data sorting, filtering, reporting and analysis capabilities. It must allow for future neighborhood adjustments based on market changes, both for land and buildings.

The CAMA system must have the following requirements:

- Robust timely tech support
- Easily customizable reports which can be modified in-house
- Customizable dashboards
- Robust security
- Access to training
- Easily integrated with common mapping software
- Must have Business Personal Property Capabilities

The Contractor will work closely with the Brattleboro Assessor's office throughout the project. The Town Assessor will coordinate with the Contractor's designated lead. The Town will provide the mailing services, access to the existing CAMA system and all documentation from the previous 2010 reappraisal as well as data from annual neighborhood inspections.

Scope of Services

1. The reappraisal project requires the complete appraisal of all taxable, exempt and non-taxable properties within the Town of Brattleboro, including valuation of land under cell towers and the valuation of excluded land associated with the use value appraisal program.
2. The Contractor will evaluate and update the CAMA system and complete the required appraisal services within the context of the approved system. Property data from the CAMA system must be accurately transferred. The system must be able to produce taxpayer notices and generate electronic transfer of data to the Axiomatic Grand List software, VTPIE. The system must also be capable of running relevant, easy to use and customizable reports.
3. The Contractor will provide a project plan within two weeks of the execution of an agreement with the Town and must include a detailed Public Outreach.
4. The Contractor shall review existing property descriptions, neighborhood delineations, tax maps, zoning descriptions, and other relevant information to understand the current assessment system.
5. The Contractor shall analyze three years of sales information, conduct on-site reviews, verify the sales information and correct the associated assessment information, if necessary.
6. The Contractor shall provide evidence that assessments on aggregate are at 100% of market value.
7. The Contractor shall prepare and analyze income and expense data, and market rental information from applicable commercial and industrial properties. The Contractor will develop capitalization and discount rates for review by the Town based on current investment criteria.
8. The Contractor shall review and refine, in coordination with the Town Assessors, neighborhood delineations, analyze vacant and improved property sales and develop land-pricing schedules that result in accurate estimates for land values for every property in Town. The new land schedules must also produce current Act 60/68 Housesite values (≤ 2.00 acres) where applicable.
9. The Contractor shall produce new models in the CAMA system for cost depreciation, sales comparison, MRA, income and any other applicable valuation methods for all types of real property in Brattleboro.
10. The Contractor shall test the various computer models against the existing sales data to verify the reliability and accuracy of the models for estimating fair market values.
11. The Contractor shall conduct interior inspections of at least 90% improved properties, all inactive and exempt properties and provide photos and sketches. The Contractor shall produce, review and verify Fair Market value estimates for every property. The Contractor shall identify all common areas and common elements associated with condominium and other residential

developments, establish a value, and utilize a consistent method of applying said value to the parcels with an interest in such common land elements.

12. The Contractor shall provide manuals clearly explaining the valuation methods, the data and the processes to aid the Town in defending the new assessments, maintaining the CAMA system and valuing new properties, subdivisions and changes to existing properties in both paper and electronic form.
13. The Contractor shall conduct weekly update meetings with the Brattleboro Assessors.
14. The Contractor shall complete all these activities in compliance with Vermont's Three Prong Test and accepted standard appraisal practices, conforming to the guidelines of the International Association of Assessing Officers and all applicable state statutes and rules.
15. The Assessor's Office will provide the following services:
 - Mail Income and Expense forms
 - Complete listing of building permits
 - Mail Change Notices
 - Provide review of work
 - Provide assistance with Public Outreach

Deliverables

The Proposal should include a work schedule with a final completion date for all data entry by December 24, with a final completion no later than April 1 of the approved tax year.

The final deliverables will include:

- A final computer generated property record card for each parcel and updated grand list.
- Change of Appraisal Notices.
- Updates to the Appraisal Software database that reflect the new land schedules and updated cost.
- Income and market models and the successful completion of any appeals thru the Board of Civil Authority level.
- The documentation produced for this project shall include a new land valuation manual that includes neighborhood descriptions, land schedules and descriptions of adjustments, a copy of the sales file and adjustments made to create the land schedule, copies of other manuals, tables or reference materials and training materials which will enable the municipality to maintain and update values, including tables and formulas to be used in applying the cost, sales comparison and income approach to appraisal. All materials related to this project shall become the property of the Town of Brattleboro, Vermont.
- Implementation of new software and training, if applicable.

Proposal Format

All Contractors responding to this Request for Proposal are required to submit a Proposal for Services that incorporates all the tasks outlined in this document and the following:

1. A cover letter signed by an authorized representative expressing the firm's/individual's interest in working with the Town of Brattleboro on this particular project, and identification of the principal individual(s) assigned to this project.
2. A narrative proposal describing the approach to the Scope of Work, including a clear breakdown and explanation of tasks.
3. Experience of company and individual(s) working on this project
4. A detailed budget by activity. The contract will be awarded on a fixed fee basis, the budget breakdown is used to evaluate the proposal and for any additional services during the contract period.
5. A date specific project schedule with benchmarks.
6. Contact information for three references
7. Relevant work sample.
8. Date available to begin.

Additional Requirements

Contingencies

Conditions precedent to award of contract will be:

1. If upon receipt of the Vermont Department of Taxes '2023 Result of Equalization Study' on or before January 1, the Town's CLA and/or COD percentages fall outside of the States acceptable range indicating a mandated order.

Or

2. The Town authorizing at Representative Town Meeting in March a Town-wide Reappraisal as deemed expedient in the absence of a States mandated order.

If both conditions fail, the contract will be void.

Equal Employment Opportunity

The Contractor shall comply with the applicable provisions of Title VI of the Civil Rights Act of 1964 as amended, Executive Order 11246 as amended by Executive Order 11375 and as supplemented by the Department of Labor regulations (41CFR Part 60.) The Contractor shall comply with all requirements of Title 21, V.S.A., Chapter 5, Subchapters 6 and 7, relating to fair employment practices to the extent applicable. A similar provision shall be included in any and all subcontracts.

Insurance

The Contractor shall take out and maintain during the life of this project, Comprehensive Board Form General Liability Insurance in the amount of \$2,000,000 including protection for bodily injury and property damage with a combined single limit of \$1,000,000 aggregate. The Worker's Compensation Insurance shall provide employer's liability insurance in the amount of \$100,000.

Certification of Insurance shall be supplied to the Town by the Contractor detailing the above coverage prior to commencement of work. This certificate will be issued by a carrier authorized to do business within the State of Vermont.

No Warranty is made that the coverages and limits listed above are adequate to cover and protect the interests of the Consultant for the survey operations. These are solely minimums that have been developed and must be met to protect the interests of the Town. It is the express responsibility of the Contractor to obtain adequate coverage for the project.

Indemnification

The Contractor shall and hereby agree to indemnify, save harmless and defend the Town of Brattleboro from the payment of any sum of money to any person whomsoever on account of claims or suits growing out of injuries to persons, including death, or damages to property caused by the Contractor, the Contractor's employees, agents of sub-Contractors or in any way attributable to the performance and prosecution of the work herein contracted for, including (but without limiting the generality of the foregoing), all claims for service, labor performed, materials furnished, provisions and supplies, injuries to persons or damage to property, liens, garnishments, attachments, claims, suits, costs, attorneys' fees, costs of investigation and of defense.

Liquidated Damages

Failure by the Contractor to complete all work without a written and executed agreement by both parties shall be cause for a payment from the Contractor on request of the Board of Listers in the amount of \$500 per day beyond the specified day of completion. For the purpose of the liquidated damages only, completion date of all work to be agreed upon prior to execution of contract and is defined as follows:

- Completed data collection cards
- Completed sketches
- Completed final valuations
- Software successfully installed and staff trained
- Production of the 411 Form (or equivalent) from the State's Grand List software
- Grievance Appeals completed and recorded
- As Billed Grand List filed with the Town Clerk

Available Information

1. Tax map and parcel data
2. Examples of current land schedules
3. Property descriptions from the current CAMA system
4. Copies of completed sales verification forms

Qualifications and Evaluation

The Proposal should include the following:

- Scope of services
- Professional qualifications and names of the principals of the firm
- Qualifications of the project manager and key staff assigned to the project
- Descriptions of the proposed methodologies for assessing values on each class of property
- Description of quality control and testing of results
- Schedule of work by task
- Lists of all municipal reappraisals currently underway and completed within the last five years including client contacts and references.
- Cost proposal including software fees and maintenance
- An example of a data collection form
- The Contractor shall identify property types beyond their expertise (eg: railroads, colleges etc.)

The evaluation of the Proposal will be based on:

- Firms understanding of the scope of the work
- Proposed methodology for completing the work
- Proposed CAMA system
- Qualifications of the firm
- Work on similar projects
- Cost proposal

(Taxable properties only - State and Non-tax status properties are not listed below)

REAL ESTATE Category/Code	Parcel Count	Municipal Listed Value	Homestead Ed Listed Value	Nonhmatd Ed. Listed Value	Total Education Listed Value
Residential I R1	2,587	532,026,380	350,297,935	181,728,445	532,026,380
Residential II R2	243	93,537,200	52,344,300	41,192,900	93,537,200
Mobile Homes-U MHU	352	12,093,530	7,735,840	4,357,690	12,093,530
Mobile Homes-L MHL	38	4,418,750	2,954,570	1,464,180	4,418,750
Seasonal I S1	3	163,150	0	163,150	163,150
Seasonal II S2	7	1,099,420	0	1,099,420	1,099,420
Commercial C	419	261,782,080	2,580,991	259,201,089	261,782,080
Commercial Apts CA	101	43,787,230	261,060	43,526,170	43,787,230
Industrial I	53	92,010,710	0	92,010,710	92,010,710
Utilities-E UE	9	49,160,160	0	49,160,160	49,160,160
Utilities-O UO	0	0	0	0	0
Farm F	15	7,118,180	2,964,590	4,153,590	7,118,180
Other O	262	36,849,770	20,960,798	15,888,972	36,849,770
Woodland W	27	2,721,380	0	2,721,380	2,721,380
Miscellaneous M	182	12,497,990	890,040	11,607,950	12,497,990
TOTAL LISTED REAL	4,298	1,149,265,930	440,990,124	708,275,806	1,149,265,930
P.P. Cable	1	1,611,100		1,611,100	1,611,100
P.P. Equipment	387	79,431,260			
P.P. Inventory	0	0			
TOTAL LISTED P.P.	388	81,042,360		1,611,100	1,611,100
TOTAL LISTED VALUE		1,230,308,290	440,990,124	709,886,906	1,150,877,030
EXEMPTIONS					
Veterans 10K	27/27	270,000	180,000	90,000	270,000
Veterans >10K		758,900			
Total Veterans		1,028,900	180,000	90,000	270,000
P.P. Contracts	227	4,934,836			
Contract Apprv VEPC	0/0	0	0	0	0
Grandfathered	1/1	500,000	0	500,000	500,000
Non-Apprv(voted)	0/0	0			
Owner Pays Ed Tax	7/7	4,030,815			
Total Contracts	235/8	9,465,651	0	500,000	500,000
FarmStab Apprv VEPC	0/0	0	0	0	0
Farm Grandfathered	0/0	0	0	0	0
Non-Apprv(voted)	0/0	0			
Owner Pays Ed Tax	8/8	1,676,877			
Total FarmStabContr	8/8	1,676,877	0	0	0
Current Use	107/107	14,335,700	5,674,100	8,661,600	14,335,700
Special Exemptions	50		0	12,337,450	12,337,450
Partial Statutory	12/12	6,915,689	0	6,915,689	6,915,689
Sub-total Exemptions		33,422,817	5,854,100	28,504,739	34,358,839
Total Exemptions		33,422,817	5,854,100	28,504,739	34,358,839
TOTAL MUNICIPAL GRAND LIST		11,968,854.73			
TOTAL EDUCATION GRAND LIST			4,351,360.24	6,813,821.67	11,165,181.91
NON-TAX	215 NON-TAX PARCELS ARE NOT INCLUDED ON THE 411				