



REQUEST FOR PROPOSAL
for
TOWN-WIDE REAPPRAISAL
To Be Determined (TBD)
GRAND LIST
{2026 or 2027}

ISSUED BY:

Town of Franklin
P.O. 82
Franklin, VT 05457
www.franklinvermont.org

DATE OF ISSUE: December 28, 2023

DUE DATE FOR PROPOSALS:
February 22, 2024 – 1:00 PM

TOWN OF FRANKLIN
GRAND LIST TOWN-WIDE REAPPRAISAL

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REQUEST FOR PROPOSAL
for
TOWN-WIDE REAPPRAISAL
TBD GRAND LIST

The Town of Franklin is requesting proposals from qualified, licensed and certified reappraisal contractors to complete a town-wide reappraisal.

The selected contractor shall be responsible for all aspects of the reappraisal process including a thorough analysis of the local real estate market, review of the existing Computer Assisted Mass Appraisal (CAMA) data and the development of computer models for estimating the fair market value of all property parcels located in the Town of Franklin.

Proposals are due to the Town of Franklin by **February 22, 2024 at 1:00 PM**. Paper copies of the request for proposal may be obtained by contacting the Franklin Listers Office at (802) 285-2101.

This request for proposal intends to be informative and explanatory. Any contractor who will be submitting bids should contact the Franklin Listers office with any questions, corrections, errors or omissions found during their review of the RFP. The Franklin Listers office will interpret any misunderstanding arising from content in the RFP and their decision deemed final and binding.

INTRODUCTION

The Town of Franklin, chartered in 1789, is located in the Northwest portion of Franklin County, along the Canadian border. The population of the Town of Franklin was 1,363 as of the 2020 Census. Franklin’s land mass is approximately 40.8 square miles which includes Lake Carmi.

As of 2023 Franklin has a mix of residential, seasonal lake front, agricultural and forest lands, as well as the Millpond Campground with approximately twenty taxable travel trailers. Franklin also has 79 properties enrolled in the State of Vermont’s current use program. The 2023 Common Level of Appraisal (CLA) is 83.76% and the Coefficient of Dispersion (COD) is 22.04%.

The 2023 Grand List has 987 individual parcels broken out as follows:

Property Class/Type	2023 Property Count
Residential 1	308
Residential 2	188
Mobile Homes - U	24
Mobile Homes - L	26
Seasonal 1	250
Seasonal 2	8
Commercial	8
Commercial Apts.	2
Industrial	0
Utilities - E	3
Utilities - O	1
Farm	21
Other	44
Woodland	33
Miscellaneous	71
Total	987

The contractor will also collect data and take photos of 21 non-taxable parcels.

DESCRIPTION OF PROJECT

The Town of Franklin's town-wide 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 for all property types;
- Depreciation schedules shall adhere to standard MicroSolve CAMA table structures; Marshal and Swift cost tables.
- Multiple digital photos of each property; front and back photo of every major structure or dwelling / one photo of every outbuilding and or value influencing element (ponds, exceptional view, wetland, etc.) Photos attached to record within the CAMA software.
- 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. Property listing data will be reviewed to assure compliance with new analyses.

All future construction, subdivisions and property changes will be valued using the same methodologies.

Franklin completed its last town-wide appraisal for 2012. Since that time, Franklin has seen numerous subdivisions with new residential home construction.

PROJECT PURPOSE & OBJECTIVES

The objective for this reappraisal is to generate accurate, defensible estimates of the fair market value for every property in the Town of Franklin. In addition, the models shall be integrated into the appraisal software system.

SCOPE OF SERVICES

- a. The contractor shall review existing CAMA property descriptions, neighborhood delineations, tax maps, zoning descriptions and other relevant information to understand the current assessment system.
- b. The contractor shall analyze three years of sales information, verifying the sales information and correcting, as need, the associated assessment information. Generate a “sales book” including all property transactions that were considered in creating or adjusting land schedule, cost tables and depreciation schedules
- c. The contractor shall review and refine neighborhood delineations, analyze vacant and improved property sales, develop a land schedule and a lake front property schedule that result in accurate estimates for land values for every property in town.
- d. The contractor will visit each property for the purpose of completing an interior inspection of all Residential (year-round and seasonal), Farm/Agricultural and Commercial buildings and will update property data, sketches and photos for each property.
- e. The contractor 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 Franklin.
- f. The contractor shall review existing CAMA/NEMRC property descriptions.
- g. The contractor shall produce, review and verify fair market value estimates for every property in Franklin. Each parcel file shall include a digital CAMA cost sheet and property record card.
- h. The contractor, working with the Listers, shall produce a Change of Assessment Notice to be mailed to every property owner as the official notification.
- i. The contractor shall assist the Listers/Assessor with the formal Listers’ grievances and Board of Civil Authority (BCA) appeals.

- j. The contractor 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. The contractor shall complete all of these activities in compliance with Vermont’s “three-prong test”, 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 Franklin.

Town of Franklin Will be Responsible for the following:

- Scheduling appointment for the site visits.
- Printing/ mailing cost associated with a Change of Assessment Notice and with Reappraisal Notices. Working with the contractor as to deadlines for completion.

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PROJECT SCHEDULE

Mail RFP’s	12/28/2023
Proposal Submittals Due/Open & Record	2/22/2024
Selection of Firm (Anticipated)	3/29/2024
Work Plan Established with Contractor	4/30/2024
Deliver Preliminary Grand List	TBD
Reappraisal Notifications Mailed (on or before)	TBD
Grievance Hearings (Dates TBD)	TBD
File Final Grand List	TBD

Note: Dates are subject to discussion and review with the contractor at the time of contract negotiations, although it’s expected of the contractor to complete the preliminary and final grand lists in accordance with state guidelines and requirements. All proposals should include a work schedule.

DELIVERABLES

The final deliverables shall include:

- a. A final computer-generated property record card and CAMA cost sheet for each parcel file, and for each dwelling/residence on that parcel.
- b. Digital photos attached for each property record uploaded to CAMA. See page 5 above.
- c. A copy of the updated Grand List.
- d. Change of Assessment Notices to property owners by TBD. Subject to overall timeline of project / contractor availability
- e. Updates to the appraisal software database that reflect the new land schedules and updated cost.
- f. Income and market models and the successful completion of any appeals thru the Board of Abatement level.
- g. 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 any other manuals, tables or reference materials developed or used during this project.

ADMINISTRATIVE INSTRUCTIONS

A timely response to the deadline identified must be received for the solicitation to be considered. Interested parties are required to submit information requests and/or questions in writing, e-mail, US Mail or hand delivered to the Franklin Listers' office:

Mailing Address: Franklin Listers' Office
 P.O. 82
 Franklin, VT 05457

Physical Address: Franklin Listers' Office

5167 Main Street
Franklin, VT 05457

Telephone: (802) 285-2101

E-Mail: listers@franklinvt.net

The deadline for submissions is Thursday, February 22, 2024 at 1:00 PM.

Submittals received after this deadline will not be considered. Please write on the outside of sealed envelope or package: "Proposal for Town-Wide Reappraisal" and the name of the entity proposing. Four (4) copies of your submittal are required. Proposals will be opened and recorded at the Franklin Listers Office on Thursday, February 22, 2024 at 1:30 PM. **Proposals must remain valid for at least 60 days.**

All proposals should include the following:

- a. Scope of services
- b. Professional qualifications
- c. Names of principals of the firm
- d. Project manager name and qualifications
- e. Number and names of key staff assigned to the project and qualifications
- f. Description of proposed methodologies for assessing values in each class of properties.
- g. Description of quality control and testing of results
- h. Project cost proposal
- i. Schedule of work
- j. A list of reappraisals currently underway and completed in the last 3 years
Work shall not be assigned or sublet to any other entity without full consent, and written permission, of the Town of Franklin. The contractor shall not either legally or equitable assign any of the moneys payable under a final agreement, unless by and with the consent of the Town of Franklin.

The request for proposal is intended to be explanatory. Should any discrepancy appear, or and misunderstanding arise to the intent of anything contained herewith, the interpretation and decision of the Town of Franklin shall be final and binding. Any corrections of errors or omissions in the Request for Proposal

may be made by the Town of Franklin when such correction is necessary for the property fulfillment of their intention as construed by the Town of Franklin.

Firms submitting proposals for the project shall bear the full cost of preparing the proposal and negotiating the final contract if selected by the Town of Franklin. There shall be no claims whatsoever for reimbursement from the Town of Franklin for the cost and expenses associated with this project.

EVALUATION

Each proposal submitted will be evaluated based on the following:

- a. Firm’s understanding of the scope of services
- b. Proposed methodology for completing the work
- c. Qualifications of the firm to complete the work
- d. Work and experience from similar projects
- e. Work schedule
- f. Cost proposal

The Town of Franklin reserves the right to reject any or all proposals and to modify or issue changes to the original Request for Proposal (RFP). Any change will be distributed to all those who originally issued the RFP. The Town of Franklin also reserves the right to select the consultant/firm that, in the best judgement of the Town of Franklin, will perform in a timely manner irrespective of the estimated fee for completing the project. The Town of Franklin may also negotiate with consultants/firms to modify or amend portions of their respective proposals.

ADDITIONAL REQUIREMENTS

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 (41 DFR Part 60). The contractor shall comply with all the 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/all subcontracts.

Insurance

The contractor shall take out and maintain during the life of this project, such Comprehensive and General Bodily Injury Liability Insurance and Property Damage Liability Insurance as shall protect them and any employee for personal injury, including accidental death, as well as, from claims for property damage, which may arise from operations under this project, whether such operations by themselves or by any employee or by anyone directly or indirectly employed by them. The contractor shall have a minimum umbrella coverage of \$1,000,000 per occurrence.

Indemnification

The contractor shall and hereby agree to indemnify, save harmless and defend the Town or Franklin 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 subcontractors 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, provision and supplies, injuries to persons or damage to property, liens, garnishments, attachments, claims, suits, costs, attorney's fees, costs of investigation and of the defense.