

TOWN OF PANTON

**REQUEST FOR PROPOSAL FOR GL 2023 TOWN-WIDE REAPPRAISAL
ISSUED BY TOWN OF PANTON, VT**

Date of Issue: November 29, 2022

Due Date for Letter of Intent to Submit a Proposal: December 9, 2022

Due Date for Proposal: January 6, 2023

TOWN-WIDE REAPPRAISAL

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TOWN OF Panton REQUEST FOR PROPOSAL for GRAND LIST 2023 TOWN-WIDE REAPPRAISAL

The Town of Panton is requesting proposals from qualified, certified reappraisal contractors to work with the Town of Panton to complete a town-wide reappraisal for the 2023 Grand List.

The selected contractor will be responsible for a thorough analysis of local real estate market conditions and review of the existing Computer Assisted Mass Appraisal (CAMA) data leading to the development of computer models for estimating the fair market value of all taxable property in Panton.

Please submit a letter of intent to submit a proposal no later than December 9, 2022.

Proposals are due by noon on January 6, 2023.

This Request for Proposal is intended to be explanatory, but should any discrepancy appear or misunderstanding arise as to the intent of anything contained herewith, the interpretation and decision of the Town of Panton shall be final and binding. The Town of Panton may correct errors or omissions in the Request for Proposal when such correction is necessary for the proper fulfillment of their intention as constructed by the Town of Panton.

INTRODUCTION

The Town of Panton is situated south-central Addison County. The last town-wide reappraisal was completed in 2012.

The selected contractor will collect data and take pictures of all Grand List properties in Panton.

The Town uses 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.

DESCRIPTION OF PROJECT

The Town of Panton's town-wide reappraisal project shall include:

- a. The development of new land schedules and neighborhood delineations to estimate land values for every site in town.

- b. Full analysis of sales over three-year period to formulate accurate, localized cost and depreciation schedules to develop a market adjusted cost approach for all property types.
- c. Land, lakefront, and depreciation schedules shall adhere to standard MicroSolve table structures.
- d. Multiple digital photos of each property.
- e. Measurements and physical inspections of all properties to gather accurate and pertinent information.
- f. Review current construction costs (labor, materials, etc.) along with market data.

These, and any other applicable methods, shall be incorporated into the existing MicroSolve CAMA software system or such other software system as the State of Vermont may require and the existing property listing data will be reviewed to assure compliance with new analyses.

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 Pantton. 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.

SCOPE OF SERVICES

1. The contractor shall review existing CAMA property descriptions, neighborhood delineations, tax maps, zoning descriptions, and other relevant information to understand the current assessment system.
2. The contractor shall analyze three years of sales information to verify sales information and correct the associated assessment information as needed.
3. The contractor shall review and refine 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. These new schedules must produce current Act #60 Homestead site values. In furtherance of this, the contractor shall:
 - a. Advise the Town on appropriate updates to the existing valuation schedules for lakefront property, non-lakefront property, and acreage, including diminishing values for lakefront and greater land acreage when property can be subdivided under current zoning regulations. This advice should include an analysis as to the

valuation schedules used by other Vermont municipalities and the rationale for the recommendations made.

- b. Advise the Town as to whether there should be both an initial lakefront assessment as well as a per-lakefront footage assessment. The rationale for this advice should be included.
 - c. Advise the Town as to whether it should continue to apply different assessment values based upon the delineation of separate neighborhoods. The rationale for this advice should be included.
 - d. Advise the Town as to whether it should revise the CAMA tables on an annual (or other periodic) basis with a view towards minimizing cost and effort in future town-wide appraisals. The rationale for this advice should be included.
4. The contractor shall visit each property for the purpose of completing an inspection of all Residential (year-round and seasonal), Condominium, Farm/Agricultural, and Commercial/Industrial buildings and will update sketches and photos for each property.
 5. The contractor shall supply a plan of action for inspections, specifically outlining how inspections will be scheduled.
 6. The contractor shall produce new models in the CAMA system for cost and depreciation, sales comparison, market research analysis, income, and any other applicable valuation methods for all types of real property in the Town of Pantton.
 7. The contractor shall review existing CAMA/NEMRC property descriptions to assure compliance with new market models for valuation.
 8. The contractor shall produce, review, and verify fair market value estimates for every property in Pantton. Each parcel file shall include a CAMA cost sheet and property record card.
 9. The contractor shall confirm municipal or private water and sewer connections for each property.
 10. The contractor, working with the Listers and/or Assessor, shall produce a Change of Assessment Notice to be mailed to every property owner as the official notification.
 11. The contractor, with the Listers, shall conduct informal hearings for taxpayers to question the new assessment values and shall assist the Listers/Assessor with the formal Listers' grievances and Board of Civil Authority (BCA) appeals.
 12. The contractor shall test the various computer models against existing sales data to verify accuracy of the model for establishing fair market values.

13. 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 as well as how peculiarities in construction that are not described in Marshall & Swift are appraised.
14. The contractor shall complete these activities in compliance with Vermont's "three-prong test," other accepted appraisal practices, and conforming to all applicable state statutes and rules.
15. All data, maps, reports, forms, worksheets, and other materials used for this reappraisal shall belong to the Town of Panton.

AVAILABLE INFORMATION

Tax map and parcel data

Examples of current land schedules and MICROSOLVE manuals

Property descriptions from current CAMA systems

Copies of completed Sale Verification Forms

DELIVERABLES

The final work product will be:

- 2023 Grand List
- Change of Assessment Notices
- MICROSOLVE CAMA software updates that reflect the new land schedules and updated cost, income, and market models
- Successful completion of the informal appeals

The documentation produced for this project shall include:

- New land valuation manual that includes neighborhood delineations, if any.
- Land schedules and descriptions of adjustments
- The sales file and adjustments made to create the land schedule,
- Copies of any data collection or review manuals developed or used during, this project,
- Copies of any other manuals, tables or reference materials developed or used during this project.
- Property record cards for each parcel. Properties with multiple residences shall have a property record card for each residence.

ADMINISTRATIVE INSTRUCTIONS

The proposals are due by noon on January 6, 2023 and should be sent by mail or email to:

Maggie McCormick, Panton Town Clerk-Treasurer
3176 Jersey Street
Panton, VT 05491

Clerk-Treasurer@Pantonvt.us

The work shall not be assigned or sublet without previous consent of the Town of Panton and the contractor shall not either legally or equitably assign any of the moneys payable under this agreement, unless by and with consent of the Town of Panton.

All materials related to this project shall become the property of the Town of Panton.

QUALIFICATIONS AND EVALUATION

The proposal should include the following:

- Scope of services
- Professional qualifications and names of the principals of the firm
- The qualifications of the project manager and key staff assigned to the project
- Description of the proposed methodologies for assessing values on each class of property
- Description of quality control and testing results
- The cost proposal
- Schedule of work by task
- List of all municipal reappraisals currently underway or completed within the last five years including client contacts and references

The evaluation of the proposal will be based on:

- Firm's understanding of the scope
- Proposed methodology for completing work
- Qualifications of the firm
- Work on similar projects
- Cost proposal
- Timeline for commencement and completion of the project

THE TOWN OF PANTON RIGHTS

The Town of Panton reserves the right to reject any or all proposals and to modify or issue changes to the original RFP. Any change will be distributed to all those originally issued the RFP. The Town of Panton also reserves the right to select the consultant that, in the best judgment of the Town of Panton will perform in a timely manner irrespective of the estimated fee for completing the project. The Town of Panton may also negotiate with consultants to modify or amend certain portions of their respective proposal.

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 (41DFR 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 and all subcontracts.

Insurance

The Contractor shall take out and maintain during the life of this project such Comprehensive 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 are conducted by themselves or by any employee or by anyone directly or indirectly employed by them. The contractor shall have minimum umbrella coverage of \$1,000,000 per occurrence.

Indemnification

The Contractor shall and hereby agree to indemnify, save harmless and defend the Town of Panton from the payment of any sum of money to any person whomsoever on account of claims of 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 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 the defense.

The issuance of this solicitation constitutes only an invitation to present qualifications and responsive materials. The rights reserved by the Town, which shall be exercised at its sole discretion, include without limitation the right to:

1. Require additional information to supplement or clarify a submittal.
2. Conduct investigations with respect to the stated qualifications and experience of a
3. respondent.
4. Waive any defect or technicality in any proposal received.
5. Determine which respondents are qualified to be considered.
6. Eliminate any respondent with an untimely, incomplete, or inadequate submittal.
7. Supplement, amend, or otherwise modify this solicitation.
8. Receive questions concerning this solicitation and to respond.
9. Cancel this solicitation in whole or in part with or without substitution of another solicitation if determined to be in the best interest of the Town.
10. Take any action affecting the solicitation process or the Project that would be in the best interests of the Town.
11. Make public all documents associated with the project.
12. The bid will be awarded subject to availability of funds. The Town of Panton Selectboard reserves the right to reject any and all bids based on financial constraint or other factors that negatively impact the successful completion of the project.
13. The Town of Panton reserves the right to accept or reject any or all bids, or parts thereof, or to select the bid to be in the best interest of the Town.

TOWN CONTACT

Maggie McCormick
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Town of Panton
3176 Jersey Street
Panton, Vermont 05491

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