

**REQUEST FOR PROPOSALS FOR
TOWN-WIDE REAPPRAISAL**



ISSUED BY:

**THE TOWN OF POULTNEY, VERMONT
9 MAIN STREET
POULTNEY, VT 05764**

Date of Issue: September 20, 2024

Due Date for Proposals: November 1, 2024

INTRODUCTION

The Town of Poultney is requesting Proposals from qualified, licensed reappraisal contractors to complete a Town-wide reappraisal for the Grand List, at the earliest possible date. The selected contractor will be responsible for all aspects of the reappraisal leading to the development of computer models for estimating the fair market value of all property in the Town of Poultney which is inclusive of all Village properties as well. Proposals are due via e-mail to poultneylisters@comcast.net or poultneymanager@comcast.net by 12:00 PM, November 1, 2024.

Copies of this RFP and supporting materials may be obtained by emailing: The Assessor at poultneylisters@comcast.net

INTRODUCTION

The Town of Poultney is located in western Rutland County Vermont abutting New York State. It consists of 44.8 square miles of rural, village, Lake District (northern portion of Lake St Catherine), agricultural, open land, & industrial slate quarries.

Combined parcel breakdown, as of September 2024, is as follows:

Residential I	883
Residential II	304
Mobile Homes-Unlanded	14
Mobile Homes- Landed	69
Seasonal I	108
Seasonal II	14
Commercial	72
Commercial Apts	12
Industrial	35
Utilities-E	12
Utilities-O	0
Farm	15
Other	0
Woodland	1
Miscellaneous	<u>154</u>
Total Listed Real	1,693
Non-Taxable	36
Inactive Parcels	285

The Town of Poultney was last reappraised in 2011 by Cross Country Appraisal Group LLC. The Town currently 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 with software compatible with the Vermont Property Information Exchange (VTPIE) grand list program. Please specify in your proposal which software you would use and be prepared to discuss potential costs and requirements to the Town for the conversion from MICROSOLVE to new software.

1. DESCRIPTION OF PROJECT

The reappraisal project shall involve development of new land schedules and define neighborhood delineations to estimate land values for every site as well as itemize building and depreciation schedules for the Town/Village of Poultney. Interior and exterior inspections of as many properties as possible to produce accurate results for all properties; detailed analysis of all sales over a three-year period to include Multiple Regression Analysis (MRA) to formulate accurate localized cost tables and depreciation schedules for all types of properties. These, and any other applicable methods, shall be incorporated into the CAMA software system and the existing property listing data will be reviewed to assure compliance with the new analyses.

The company must be able to transmit from software to the Axiomatic Grand List Software in the Vermont Property Information Exchange (VTPIE) Grand List module that successfully produces an electronic Education Grand List for the Vermont Tax Department. The system also must provide extensive data sorting, filtering, reporting and analyses capabilities. It must allow for future neighborhood adjustments based on market changes, both for land and buildings.

The contractor(s) will work closely with Town staff throughout the project. The Town will provide access to the existing CAMA system, and all available documentation from the previous (2011) reappraisal.

The contractor will be responsible for all aspects of the reappraisal, under the oversight of Town staff.

Project Purpose and Objectives

The objective of this reappraisal is to generate accurate, defensible estimates of the fair market value (FMV) for every property in the Town/Village of Poultney. In addition, the models shall be integrated into the current CAMA software system or a new CAMA system so that future construction, subdivisions, and changes to existing properties may be valued using the same methodologies.

2. 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 up to three (3) years of sales information, verifying the sales information and correcting, as needed, the associated assessment information.
- c) 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 the Town/Village of Poultney. The new land schedules must also produce current Homestead and Housesite values, where applicable.
- d) The Contractor shall solicit and analyze income and expense as well as market rental information from applicable commercial and industrial properties.
- e) The Contractor shall review existing CAMA property descriptions to assure compliance with new market models for valuation using the appraisal software.
- f) The Contractor shall ensure that an adequate sample size of properties have received an interior inspection to gather pertinent data. The Contractor shall propose a methodology for coordinating and implementing interior inspections, agreeable to the Town.
- g) The Contractor shall ensure accurate exterior measurements of each structure, sketches of buildings drawn to scale with dimensions given utilizing the appraisal software program or an associated sketch program. The Contractor shall assist with transferring sketch data from existing software to new software, if necessary.
- h) The Contractor shall ensure that the Town/Village has accurate measurements of all physical improvements and give a listing of interior and exterior construction details, as able. Quality of construction, age, effective

age and condition will be shown. Additional area(s) above or below the first floor of buildings shall be accurately measured where the square footage cannot otherwise be precisely determined based on first floor area. The Contractor shall assist with transferring measurement data from existing software to new software, if necessary.

- i) The Contractor shall ensure that the Town/Village has adequate digital photography of each residential property and of each structure greater than 64 square feet on non-residential properties. Photographs shall be able to be incorporated into the CAMA database. The Contractor shall assist with transferring photographic data from existing software to new software, if necessary.
- j) The Contractor shall produce new models in the appraisal system for cost and depreciation, sales comparison, Multiple Regression Analysis (MRA) , income and any other applicable valuation methods for all types of real property in the Town/Village.
- k) 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.
- l) The Contractor shall produce, review and verify fair market value estimates for every property in the Town/Village including all non-taxable and exempt properties.
- m) The Contractor, working with the Town, shall produce a Change of Assessment Notice including every assessment change to be mailed to every taxpayer as the official notification using the current required state tax program (VTPIE and NEMRC).
- n) The Contractor shall defend values at the assessor's grievance level, and at the Board of Civil Authority level. The Town reserves the right to hire the Contractor to defend values at the State Board of Appraisers or Superior Court. The Contractor shall provide a price for defense at State Board and Superior Court.

- o) The Contractor shall produce manuals clearly explaining all 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 thorough description of land grading values as well as how peculiarities in construction that are not described in Marshall & Swift are appraised.
- p) The contractor shall complete all of these activities in compliance with Vermont's Three Prong Test as defined in Property Valuation and Review guidelines [GB-1267.PDF\(Vermont.gov\)](#) for reappraisal tests, accepted appraisal practices, and conforming to all applicable state statutes and rules.

3. PROJECT SCHEDULE AND DELIVERABLES

The Proposal shall include an estimated work schedule and final completion date. The final work product will include the April 1 Change of Assessment 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 the appeals through the Board of Civil Authority level. The documentation produced for this project shall include a new electronic version land valuation manual that includes neighborhood descriptions, land schedules and descriptions of adjustments, a copy of the sales file and adjustments model to create the land schedule, copies of any other manuals, tables or reference materials developed or used during this project.

All data, maps, reports, forms and worksheets used or developed for this reappraisal shall belong to the Town of Poultney.

4. ADMINISTRATIVE INSTRUCTIONS

The Proposal must be e-mailed by 12:00 PM, November 1, 2024, to Mary Jo Teetor at poultneylisters@comcast.net or Paul Donaldson at poultneymanager@comcast.net. Proposals and/or modifications received after this time will not be accepted or reviewed. It is recommended that you check off "Request a Delivery Receipt" through e-mail Options when sending. No facsimile-machine produced Proposals will be accepted. The Town will accept late

submissions if it can be proven that the Town's e-mail system had technical difficulties delaying the delivery.

Proposals shall include the following:

- a) Scope of services;
- b) Professional qualifications and names of the principals of the firm;
- c) The qualifications of the project manager and key staff assigned to the project;
- d) Description of the proposed methodologies for assessing values on each class of property;
- e) Proposed methodologies for obtaining exterior and interior inspections, measurements, photography, sketches and related data;
- f) Description of quality control and testing of results;
- g) Proposed schedule of work by task, including completion date;
- h) List of all municipal reappraisals currently underway or completed within the last three years including client contacts and references;
- i) Estimated number of Inspectors to be employed;
- j) Description of the type of CAMA software proposed for the reappraisal and resulting data. The CAMA system must have robust and timely tech support, easily customized reports with ability to modify in house, customizable dashboards, robust security, access to training, easily integrated with mapping software, and must have business personal property capabilities. Description shall include benefits and functionality of software, and ability to transfer data from Town's existing CAMA software.

The work shall not be assigned or sublet without the prior written consent of the Town. The contractor shall not either legally or equitable assign any of the funds payable under this agreement, unless by and with the consent of the Town.

This Request for Proposals is intended to be explanatory. Should any discrepancy appear, or any misunderstandings arise as to the intent of anything contained therewith, the interpretation and decision of the Town shall be final and binding. Any corrections of errors or omissions in the Request for Proposals may be made by the Town when such correction is necessary for the proper fulfillment of their intention as construed by the Town.

Copies of this Request for Proposals and any supporting materials and addenda may be obtained at <https://poultney.vt.gov/> . This webpage will be the central source for any information and clarifications associated with this RFP.

Cost of Proposal Preparation

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

Town of Poultney Rights

The Town reserves the right to select the consultant that, in the best judgment of the Town, will perform the best work in a timely manner irrespective of the estimated fee for completing the project. The Town may also negotiate with consultants to modify or amend certain portions of their respective submission.

5. 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

CFR 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 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 be 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 agree to indemnify, save harmless and defend the Town of Poultney from the payment of any sum of money to any person whosoever 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 and prosecution of the work 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 ,suit, costs, attorneys' fees, costs of investigation and of the defense.

6. AVAILABLE INFORMATION

Tax Map and parcel data

Sale Books & Data

Examples of current land schedules

Property descriptions from the current CAMA/VTPIE

7. EVALUATION

The evaluation of the submissions will be based on:

- a) Firm's understanding of the scope;
- b) Proposed methodology for completing the work;
- c) Qualifications of the firm and personnel dedicated to the project;
- d) Work on similar projects;
- e) Estimated Work Schedule;
- f) Functionality of CAMA software that will be used;
- g) In-house availability of all necessary equipment to perform required services.

8. TOWN CONTACTS

Mary Jo Teetor, Assessor

(802)-287-5111

poultneylisters@comcast.net

Paul Donaldson, Town Manager

(802)-287-9751

poultneymanager@comcast.net

Town of Poultney

9 Main Street

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