

REQUEST FOR QUALIFICATIONS FOR
TOWN-WIDE REAPPRAISAL



ISSUED BY
THE TOWN OF WEATHERSFIELD, VERMONT
PO BOX 550
5259 US ROUTE 5
ASCUTNEY, VT 05030

Date of Issue: May 2, 2023

Due Date: June 2, 2023

SUMMARY

The Town of Weathersfield is requesting a proposal from qualified, certified reappraisal contactors to work with Weathersfield to complete a town-wide reappraisal for the 2025 Grand List. The most recent town wide reappraisal was done in 2008.

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 Weathersfield.

This RFP is considered advertised on May 2, 2023. Sealed proposals must be received at the Weathersfield Town Office located at 5259 US Route 5, Ascutney, VT 05030 by 11am prevailing time, June 2, 2023. Sealed bids delivered by person, overnight express, currier, or parcel post must be clearly marked "Town of Weathersfield Reappraisal Proposal." Any bids received after this date will not be accepted, even if the proposal is postmarked on the bid due date. Copies of this Request for Proposal may be obtained by calling the Weathersfield Town Office at (802) 674-2626 Ext 2, or by email at weathersfield@weathersfield.org.

This request for proposal is intended to be explanatory, but should any discrepancy appear, or any misunderstanding arise as to the intent of anything contained herewith, the interpretation and decision of the Town of Weathersfield shall be final and binding. Any corrections of errors or omissions in the request for proposal may be made by the Town of Weathersfield when such a correction is necessary for the proper fulfillment of their intention as construed by the Town of Weathersfield.

INTRODUCTION

The Town of Weathersfield is located in south-eastern Vermont in the County of Windsor. Weathersfield is approximately 44.2 square miles (114.5 km²), of which 43.6 square miles is land and 0.58 square miles (1.5 km²) OR 1.27%, is water. There are an estimated 2,836 residents as of the 2021 census. The 2022 Equalization Study Results computed a CLA (Common Level of Appraisal) of 80.97% and a COD (Coefficient of Dispersion) of 20.45%. In the 2022 Grand List there were 1,621 taxable and 36 nontaxable parcels.

The taxable parcel breakout was as follows by category code:

Code	#
R1	647
R2	445
MHU	135
MHL	136
S1	6
S2	8
C	58
CA	0
I	1
UE	5
UO	3
F	9
O	10
W	0
M	158

The selected contractor will collect data and take pictures of properties. The Town of Weathersfield uses MicroSolve/NEMRC CAMA 2000. All properties are currently listed using this software, but Weathersfield is open to the possibility of switching to a different CAMA software system. The reappraisal project must be completed with software compatible with Vermont Property Information Exchange (VTPIE) grand list system. Please specify in your proposal what CAMA software you recommend and the cost to Weathersfield for data conversion and training if different from MicroSolve/NEMRC CAMA 2000.

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. Land and depreciation schedules will adhere to the standard CAMA table structure.
- Formulation of accurate, localized cost and depreciation schedules to develop a market adjusted cost approach for assessing all types of properties.
- These, and any other applicable methods, shall be incorporated into the existing or new CAMA software system and the existing property listing data will be reviewed to assure compliance with the new analyses.
- Preference is for this project to commence September 2023 and conclude June 2025.

PROJECT PURPOSE & OBJECTIVES

The objective of this reappraisal is to generate accurate, defensible estimates of the fair market value for every property in Weathersfield as of April 1, 2025, or soonest availability. In addition, the models shall be integrated into the CAMA system so that future construction, subdivisions, and changes to existing properties may be valued using the same methodologies.

AVAILABLE SUPPORTING INFORMATION

- Tax Map and parcel data
- Current land schedules
- Access to current CAMA system (MicroSolve/NEMRC CAMA 2000)
- Copies of completed Sales Verification Forms
- Temporary office space with Listers
- Scheduling support for site visits

SCOPE OF SERVICES

- A. The contractor shall review existing CAMA property descriptions, neighborhood delineations, tax maps, 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 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 and produce current Act 60 Homestead site values.
- D. The contractor will visit each property, with or without the Lister assistance, for purposes of completing an exterior and interior inspection of all Residential (year-round and seasonal), Condominium, Farm and Commercial buildings and will update all sketches and photos for each property.
- E. The contractor shall produce new models in the CAMA system for cost and depreciation, sales comparison, market research analysis (MRA), income and any other applicable valuation methods for all types of real property in Weathersfield.

- F. 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.
- G. The contractor shall produce, review and verify fair market value estimates for every property in Weathersfield, resulting in a new property record card.
- H. The contractor, working with the Town, shall produce a Change of Assessment Notice to be mailed to every property owner as the official notification.
- I. The contractor shall conduct informal hearings for taxpayers to question the new assessment values and shall assist the Town with the formal Lister' grievances and Board of Civil Authority 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 thorough description of land grading values as well as how peculiarities in construction that are not described in Marshall & Swift are appraised.
- K. The contractor shall complete all activities in compliance with Vermont's "Three-Prong Test" and accepted appraisal practices, conforming to all applicable state statutes and rules.
- L. All data, maps, reports, forms, and worksheets used or developed for this reappraisal shall be the property of the Town of Weathersfield
- M. Contractor will develop, maintain, and share a spreadsheet containing status of work with a detailed sheet tracking status of property visits.

DELIVERABLES

The final work products will be:

- GL 2025 Change of Assessment Notices
- Updates to the CAMA software that reflect the new land schedules and update cost, income, and market models
- Successful completion of the informal appeals
- Participation in the full grievance process
- A new land valuation manual that includes neighborhood delineations, land schedules and descriptions of adjustments
- A copy of the sales file and adjustments made to create the land schedule
- Copies of any data collection or review manuals
- Tables or reference materials developed or used during this project.
- New or updated property record cards for each parcel (Properties with multiple residences shall have a property record for each residence.).

ADMINISTRATIVE INSTRUCTIONS

Proposals are due on or before June 2, 2023, at 11am. Proposals shall be hand delivered or mailed and addressed to the Weathersfield Town Manager and clearly marked as Weathersfield Reappraisal Proposal.

Brandon Gulnick
Weathersfield Town Manager

PO BOX 550
Ascutney, VT 05030

The proposed work shall not be assigned or subcontracted without previous consent of the Town of Weathersfield and shall not either legally or equitably assign any of the moneys payable under this agreement unless by and with the consent of the Town of Weathersfield. The Town of Weathersfield reserves the right to reject any and or all proposals. Questions about this RFP can be addressed to Brandon Gulnick, townmanager@weathersfield.org OR via phone at (802) 674-2626.

QUALIFICATIONS AND EVALUATION

The proposal should 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. Description of quality control and testing results
- F. The cost proposal
- G. Schedule of work by task
- H. List of all municipal reappraisals currently underway or completed within the last five years including contacts and references

The evaluation of the proposal will be based on:

- A. Firm's understanding of the scope of the work
- B. Proposed methodology of completing work
- C. Qualifications of the firm
- D. Work on similar projects
- E. Cost of the proposal

Brandon Gulnick, Town Manager
Town of Weathersfield
PO BOX 550
Ascutney, VT 05030

(802) 674-2626
townmanager@weathersfield.org

ATTACHMENTS:

Town of Weathersfield 411 dated April 24, 2023.

(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	Nonhmstd Ed. Listed Value	Total Education Listed Value
Residential I R1	647	107,893,900	82,116,200	25,777,700	107,893,900
Residential II R2	445	121,355,600	83,973,000	37,382,600	121,355,600
Mobile Homes-U MHU	135	3,958,600	2,698,100	1,260,500	3,958,600
Mobile Homes-L MHL	136	12,488,700	9,349,100	3,139,600	12,488,700
Seasonal I S1	6	432,400	0	432,400	432,400
Seasonal II S2	8	983,400	0	983,400	983,400
Commercial C	58	16,742,300	647,100	16,095,200	16,742,300
Commercial Apts CA	0	0	0	0	0
Industrial I	1	392,500	0	392,500	392,500
Utilities-E UE	5	62,865,600	0	62,865,600	62,865,600
Utilities-O UO	3	515,800	0	515,800	515,800
Farm F	9	3,492,400	2,236,800	1,255,600	3,492,400
Other O	10	49,700	0	49,700	49,700
Woodland W	0	0	0	0	0
Miscellaneous M	158	10,970,000	381,000	10,589,000	10,970,000
TOTAL LISTED REAL	1,621	342,140,900	181,401,300	160,739,600	342,140,900
P.P. Cable	1	1,024,174		1,024,174	1,024,174
P.P. Equipment	93	2,327,314			
P.P. Inventory	0	0			
TOTAL LISTED P.P.	94	3,351,488		1,024,174	1,024,174
TOTAL LISTED VALUE		345,492,388	181,401,300	161,763,774	343,165,074
EXEMPTIONS					
Veterans 10K	34/34	340,000	280,000	60,000	340,000
Veterans >10K		1,017,000			
Total Veterans		1,357,000	280,000	60,000	340,000
P.P. Contracts	93	891,941			
Contract Apprv VEPC	0/0	0	0	0	0
Grandfathered	1/1	402,700	0	402,700	402,700
Non-Apprv (voted)	0/0	0			
Owner Pays Ed Tax	0/0	0			
Total Contracts	94/1	1,294,641	0	402,700	402,700
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	0/0	0			
Total FarmStabContr	0/0	0	0	0	0
Current Use	113/113	11,350,400	4,690,800	6,659,600	11,350,400
Special Exemptions	2		0	682,700	682,700
Partial Statutory	0/0	0	0	0	0
Sub-total Exemptions		14,002,041	4,970,800	7,805,000	12,775,800
Total Exemptions		14,002,041	4,970,800	7,805,000	12,775,800
TOTAL MUNICIPAL GRAND LIST		3,314,903.47			
TOTAL EDUCATION GRAND LIST			1,764,305.00	1,539,587.74	3,303,892.74
NON-TAX	47 NON-TAX PARCELS ARE NOT INCLUDED ON THE 411				

(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	Nonhmstd Ed. Listed Value	Total Education Listed Value
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	Status on Personal Property				
	1) Has inventory been exempted by vote of town/city?	Yes	___	No	XX
	2) Has machinery and equipment been exempted by				
	vote of your town/city?	Yes	___	No	XX
	3) If yes for #2, what portion is now exempt?				
	(include percentage)	_____			
	4) If no for #2, please indicate below how your town/city is				
	assessing business personal property (Place "X" by option used)				
	a) at fair market value	XX	b) at depreciated value	_____	

	Summary of Adjustments to Taxable Values (Local Agreements Etc.)				
	Approved (VEPC) Contracts/Exemptions				01
	Grandfathered Contracts/Exemptions				402,7001
	Non-Approved (Voted) Contracts/Exemptions				01
	Homestead Non-Approved (Voted) Contracts/Exemptions				01
	Nonhmstd Non-Approved (Voted) Contracts/Exemptions				01
	Municipal Contracts (Owner Pays Ed Tax)				01
	Special Exemptions				682,7001
	Current Use (Use Value Appraisal Program)				11,350,4001
	Veteran Exemptions				340,0001
	Homestead Veteran Exemptions beyond 10K				837,0001
	Nonhmstd Veteran Exemptions beyond 10K				180,0001
	Partial Statutory Exemptions				01
