

TOWN of BRISTOL

REQUEST for PROPOSALS

for

TOWN-WIDE REAPPRAISAL

Issued by

Town of Bristol

Post Office Box 249

Bristol, VT 05443

www.bristolvt.org

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TOWN of BRISTOL

REQUEST for PROPOSALS

For

REAPPRAISAL of TOWN-WIDE GRAND LIST

The Town of Bristol 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 Bristol.

INTRODUCTION

The Town of Bristol was chartered in 1786 and is located at the foot of the Green Mountains and as such has a topography that ranges from steep to relatively flat as the town extends out onto the bed of the Champlain Valley. The town covers approximately 23,000 acres of which 5,529 or 20% is owned by the Green Mountain National Forest. Bristol has two state highways running through it, Route 17 bisecting the town and village east/west and Route 116 going generally north/south.

Bristol experienced dramatic growth from 1960 to 1990 but the rate of growth has plateaued recently at just over 1.5%. The 2016 American Community Survey shows total population of 3,907, up from the 3,894 in the 2010 Census.

In 2016 the town had approximately 1,600 housing units. A little more than half (63%) of the housing units in Bristol are single-family, approximately 22% are multi-family units and nearly 15% are mobile homes.

The Town was last reappraised in 2018 by NEMRC, Inc. The Town currently uses MICROSOLVE CAMA software provided by New England Municipal Resource Center (NEMRC). The reappraisal project will be completed with software compatible with the Vermont Property Information Exchange (VTPIE) grand list program. Please specify in your Qualifications what CAMA software you would plan to use and, if a new software is recommended, please be prepared to discuss potential costs and any other factors to the Town.

The Town of Bristol is in Addison County in Vermont. Bristol has a land area of about 42.20 square miles and approximately 3,900 residents. Bristol has a broad mix of land uses including commercial, industrial, retail, and residential. There is a significant historic commercial and business district. Single family homes have been built in Bristol, in increasing numbers, beginning over 250 years ago.

Current residential uses also include condominiums, 2-4 family homes, multi-unit apartment buildings, residential subdivisions and some large, custom-built homes. Combined parcel breakdown as of July 1, 2023, is as follows (see attached Form 411).

Residential I	R1	938
Residential II	RII	218
Mobile Homes	MHU	79
Mobile Homes	MHL	115
Seasonal I	S1	28
Seasonal II	S2	5
Commercial	C	66
Commercial Apt.	CA	20
Industrial	I	6
Utilities	E	3
Utilities	O	0
Farm	F	10

Other	O	16
Woodland	W	0
Miscellaneous	M	<u>117</u>
Sub-Total		1,621
Cable		1
Veterans		16
Special Exemption		4
Non-Taxable		<u>95</u>
Total Active Real Parcels		1,737

DESCRIPTION of PROJECT

The Town of Bristol’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 to all property types.
- ❖ Depreciation schedules shall adhere to standard MicroSolve CAMA table structures, Marshall and Swift cost tables.
- ❖ Multiple digital photos of each property; front and rear photo of every major structure or dwelling, one photo of every outbuilding and or value influencing element (i.e., ponds, exceptional view, wetland, etc.). Photos are to be attached to record within the CAMA software. New front photo of main structure coded as #1 in CAMA.

- ❖ 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 ensure compliance with new analyses.

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

Bristol completed its last town-wide appraisal in June 2018.

PROJECT PURPOSES & OBJECTIVES

The objective for this reappraisal is to generate accurate, defensible estimates of the fair market value for every property in the Town of Bristol. 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

- a) The contractor shall review existing CAMA property descriptions, neighborhood delineations, tax maps, zoning descriptions and other pertinent and 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. Generate a “sales book” including all property transactions that were considered in creating or adjusting land schedules, cost tables and depreciation schedules.

- c) The contractor shall review and refine neighborhood delineations, analyze vacant and improved property sales, develop a land schedule that results 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 as well as seasonal), Farm/Agricultural and Commercial buildings and will update property data, sketches and photos of 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 Bristol.
- f) The contractor shall review existing CAMA/NEMRC property descriptions.
- g) The contractor shall produce, verify fair market value estimates for every property in Bristol. 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 Appraisal Notice to be mailed to every property owner as the official notification.
- i) The contractor shall assist the Listers/Assessor with the formal Lister's 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," or 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 Bristol.

- m) The contractor will develop, maintain and share a spreadsheet containing status of work with a detail sheet tracking status of property visits.

PROJECT SCHEDULE

- 1) Request for Proposals (RFP) – August 8, 2024
- 2) Pre-Bid Meeting – August 29, 2024
- 3) Submittals Due, Opened, and Recorded –September 19, 2024
- 4) Selection of firm (anticipated) September 23 or 30, 2024
- 5) Work Plan established with Contractor - TBD
- 6) Deliver preliminary Grand List-TBD
- 7) Reappraisal notices mailed, on or before: TBD
- 8) Grievance hearing dates (to-be determined) TBD
- 9) File Final Grand List. TBD

NOTE: Dates are subject to change based on discussion and review with the contractor at the time of contract negotiations, however it is expected of the contractor to complete the preliminary and final grand lists in accordance with state guidelines and requirements. All proposals shall include a work schedule.

TOWN of BRISTOL RESPONSIBLE FOR THE FOLLOWING:

- a. Printing and mailing costs associated with the Change of Appraisal Notices and Reappraisal Notices.

- b. Working with the contractor as to deadlines for completion of the project.

DELIVERABLES

The final deliverables shall include:

1. A final computer-generated property record card and CAMA cost sheet for each parcel file, and for each dwelling/residence on that parcel.
2. Digital photos attached for each property record uploaded to CAMA.
3. A copy of the updated Grand List.
4. Change of Assessment Notices to property owners by TBD. Subject to overall timeline of the project/contractor availability.
5. Updates to the appraisal software database that reflects the new land schedules and updated cost.
6. Income and market models and the successful completion of any appeals through the Board of Civil Authority.
7. The documentation produced for this project shall include a new land valuation manual that includes neighborhood descriptions, land schedules and description 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 reappraisal project.

ADMINISTRATIVE INSTRUCTIONS

A timely response to the deadline identified must be received for the proposal to be considered. Proposals will be accepted until 11:00am, Thursday, September 19, 2024, either in paper or electronic form. If by paper, please either hand-deliver or mail at least one reproducible copy of the proposal to:

Town of Bristol Lister's Office

P. O. Box 249, 1 South Street

Bristol, VT 05443

If by e-mail, please send to lister@bristolvt.org. Include "Town of Bristol Reappraisal Proposal" on the envelope or in the e-mail subject line.

Questions? Contact the Listers Office at (802) 453-2410 ext. 3 or send an e-mail to lister@bristolvt.org.

The Town of Bristol is an equal opportunity provider and employer and does not discriminate on the basis of race, color, national origin, age, disability, medical condition, religion, gender, gender identity, sexual orientation, income, or familial status.

NOTE: PROPOSALS MUST REMAIN VALID FOR AT LEAST SIXTY (60) DAYS.

ALL PROPOSALS SHALL 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 of 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) Schedule of work
- i) A list of reappraisals currently underway and completed in the last three (3) years.
- j) None of the reappraisal work shall be assigned or sublet to any other entity without the full consent and written permission of the Town of Bristol.
- k) The contractor shall not either legally or equitably assign any of the moneys payable under a final agreement, unless by and with the consent of the Town of Bristol.

This RFP is intended to be explanatory. Should any discrepancy appear and/or misunderstanding arise to the intent of any language contained herewith, the interpretation and decision of the Town of Bristol shall be final and binding. Any correction of errors or omissions in the RFP may be made by the Town of Bristol when such correction is necessary for the property fulfillment of their intentions as construed by the Town of Bristol.

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 Bristol.

There shall be no claims whatsoever for reimbursement from the Town of Bristol for the cost and expense associated with this project.

EVALUATION of PROPOSALS

Each proposal submitted will be evaluated based on the following criteria:

1. Firm's understanding of the scope of services
2. Proposed methodology for completing the work
3. Qualifications of the firm to complete the work
4. Work and experience from similar projects
5. Work schedule
6. Cost proposal

The Town may elect to interview any respondents or none. The town will review both the technical aspects of the proposal and the costs. The recommendation for award of the contract will be based upon the following considerations:

1. Responsiveness to the Request for Proposals.
2. Qualifications of the consultant or team.
3. The proposed schedule for completion.
4. The content of the proposal, including the approach taken to develop the overall estimate of both costs and person-hours and
5. 5. In accordance with the Town of Bristol Procurement Policy

The Town of Bristol 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 Bristol also reserves the right to select the consultant/firm that, in the best interest and judgement of the Town of Bristol will perform in a professional and timely manner, irrespective of the estimated fee for completing the project. The Town of Bristol may also negotiate with the consultant/firm 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. The contractor shall provide a Certificate of Insurance to the Town of Bristol.

INDEMNIFICATION

The contractor shall and hereby agrees to indemnify, save harmless and defend the Town of Bristol 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, provisions 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.