



**REQUEST FOR PROPOSAL FOR
GL 2024 or 2025 TOWN-WIDE REAPPRAISAL**

ISSUED BY

Town of St. George, VT

21 Barber Road

St. George, Vermont, 05495

Date of Issue: September 22, 2023

Due Date for Proposal: October 19, 2023, at 7:00 p.m.

GL 2024 or 2025 TOWN-WIDE REAPPRAISAL

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TOWN OF St. George
REQUEST FOR PROPOSAL
For
Grand List 2024 or 2025 TOWN-WIDE REAPPRAISAL

The Town of St. George is requesting proposals from qualified, certified reappraisal contractors to work with the St. George Assessor to complete in time for the town-wide reappraisal for the 2024 or 2025 Grand List with a projected 6-8 month lead time.

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 St. George.

Proposals are due by **October 19, 2023, at 7:00pm.** Paper copies of this request for proposal may be obtained by calling Justin Mason at (802) 673-6669 or by email at assessor@stgeorgevt.com.

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 therewith, the interpretation and decision of the Town of St. George shall be final and binding. Any corrections of errors or omissions in the Request for Proposal may be made by the Town of St. George when such correction is necessary for the proper fulfillment of their intention as constructed by the Town of St. George.

INTRODUCTION

The Town of St. George is situated Southwest Central of Chittenden County. St. George is 3.6 square miles with 5.0 miles of roads of which 1.56 are town maintained. There was an estimated 732 residents as of the 2018 census, with an estimated median household income of \$88,750.00 for 2021. Please note a large majority of Town Residents reside in the St. George Community Coop Mobile Home Park.

We have a mix of residential, agricultural, and commercial/industrial properties. Our 2023 CLA (Common Level of Appraisal) is 77.14%, the COD (Coefficient of Dispersion) is 18.87%.

For the 2023 Grand List there were 426 parcels. The parcel breakout was as follows:

R1	149
R2	48
MHU	148
MHL	5
S1	0
S2	0
C	7
CA	0
I	0
UE	4
UO	1
F	0
O	0
W	2
M	22

There are 35 non-taxable properties. The selected contractor will collect data and take pictures of these properties.

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 reappraisal project shall involve:

- Development of new land schedules and neighborhood delineations to estimate land values for every site in town,
- Land, lake front, and depreciation schedules will adhere to the standard MicroSolve table structure,
- Formulating accurate, localized cost and depreciation schedules to develop a market adjusted cost approach for all types of properties.

These, and any other applicable methods, shall be incorporated into the existing MicroSolve CAMA software system and the existing property listing data will be reviewed to ensure compliance with the new analyses.

The contractor will work closely with the St. George Assessor throughout the project. The Town will provide mailing services, and access to the existing CAMA system.

Project Purpose & Objectives

The objective of this reappraisal is to generate accurate, defensible estimates of the fair market value for every property in St. George as of April 1, 2024, or 2025. 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 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

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 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 town. The new land schedules must also produce current Act # 60 Homestead site values.
- D) The contractor will visit each property and for the purpose of completing an 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, MRA, income and any other applicable valuation methods for all types of real property in St. George.
- 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 St. George which shall include a 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 Listers' 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 these 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 belong to the Town of St. George.

DELIVERABLES

The final work product will be the GL 2024 or 2025 Change of Assessment Notices, updates to the MICROSOLVE CAMA software that reflect the new land schedules and updated cost, income and market models and the successful completion of the informal appeals. The documentation produced for this project shall include: 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 developed for, or used during this project, and 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 **October 19, 2023, at 7:00p.m.** Complete paper proposals shall be submitted in a sealed envelope, clearly marked as **2024 or 2025 St. George REAPPRAISAL**, and addressed to:

St. George Lister's Office: 21 Barber Rd, St. George, VT, 05495

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

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 client contacts and references.

The evaluation of the proposal will be based on:

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

TOWN CONTACT

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