

REQUEST FOR PROPOSALS
FOR
2016 TOWN-WIDE REAPPRAISAL

ISSUED BY
TOWN OF WILLISTON
Assessor's and Lister's Office

7900 Williston Road
Williston, VT 05495

Date of Issue
February 2015
Due Date for Proposal
April 1, 2015

TOWN OF WILLISTON
2016 TOWN-WIDE REAPPRAISAL

TABLE OF CONTENTS

Title Page	1
Table of Contents	2
Request for Proposals	3
Introduction.....	4
Description of Project	4
Scope of Services	5
Deliverables	6
Project Schedule.....	6
Administrative Instructions.....	7
Additional Requirements	7
Available Information.....	8
Qualifications and Evaluation.....	8
Town Contact.....	9

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The Town of Williston is requesting proposals from qualified, licensed reappraisal contractors to work with the Williston Assessor and Listers to complete a town-wide reappraisal for the 2016 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 Williston.

Proposals are due by 4:00 pm EST April 1, 2015. Copies of this request for proposals may be obtained by calling Debbie Greer at (802) 878-1091.

INTRODUCTION

The Town of Williston is located in the center of Chittenden County, the economic hub of Vermont. Just east of the City of Burlington, Williston, is 31 square miles with approximately 8,700 residents. It has one of the most significant retail areas within the state.

Williston has a broad mix of land uses including commercial, industrial, retail, residential and agricultural. Single family homes have been built in Williston, in ever increasing quantities, beginning over 250 years ago. Current residential uses also include mobile homes, 2-4 family homes, condominiums, multi-unit apartments, new residential subdivisions and some large, custom-built homes.

The taxable real estate in Williston involves roughly 4,100 properties made up of 3,340 residential properties, 140 un-landed mobile homes, 179 unimproved sites, 410 commercial / industrial properties, 11 Farms and 6 utilities (electric and gas).

The Town has purchased ProVal software provided by Appraisal Resource Group in Essex, VT. The reappraisal project will be completed using this software.

1. DESCRIPTION OF PROJECT

The reappraisal project shall involve:

- An exterior measurement of each structure as well as an interior inspection to gather pertinent data.
- The development of new land schedules and neighborhood delineations to estimate land values for every site in town.
- Collection and analysis of income and expense information and market rental data to update the income approach for commercial and industrial properties.
- Detailed analysis of residential sales over a three year period to develop direct sales comparison and Multiple Regression Analysis (MRA) approaches as well as formulating accurate, localized cost and depreciation schedules to develop a cost approach for all types of properties.
- One digital photo will be taken of each property, unless multiple structures are present.

The contractor(s) will work closely with the Williston Assessor throughout the project. The Town will provide mailing services, access to the existing CAMA system and all documentation from the previous (2003 and 2008) reappraisals.

Project Purpose & Objectives

The objective of this reappraisal is to generate accurate, defensible estimates of the fair market value for every property in Williston as of April 1, 2016 (this date may be changed by Vermont statute to December 31, 2016 prior to completion of the project). 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.

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 years of sales information, verifying the sales information and correcting, as needed, the associated assessment information.
- c.) The contractor shall solicit and analyze income and expense and market rental information from applicable commercial and industrial properties.
- d.) 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 #68 Homestead and Housesite site values, where applicable.
- e.) The contractor shall review existing CAMA property descriptions to assure compliance with new market models for valuation using the ProVal software.
- f.) 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 Williston.
- g.) 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.
- h.) The contractor shall produce, review and verify fair market value estimates for every property in Williston.
- i.) The contractor shall measure all physical improvements and give a listing of interior and exterior construction details. Quality of construction, age, effective age and condition will be shown. Additional area 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 areas.
- j.) The contractor shall provide a sketch of buildings drawn to scale with dimensions given utilizing the ProVal software program.

- k.) The contractor shall take one digital photograph of each residential property and one photograph of each building greater than 200 square feet of non-residential properties. Photographs shall be incorporated into the CAMA database.
- l.) 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.
- m.) The contractor shall defend values at the 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. Contractor shall provide a price for defense at State Board and Superior Court.
- n.) The contractor shall produce manuals clearly explaining the valuation methods, the data and the processes to aid the Town in defending the new assessments, maintaining the new CAMA system and valuing new properties, subdivisions and changes to existing properties.
- o.) The contractor shall complete all of these activities in compliance with accepted appraisal practices and conforming to all applicable state statutes and rules.
- p.) The contractor shall supply a plan of action for inspections, specifically outlining how inspections will be scheduled and how interior inspections shall be scheduled.

3. DELIVERABLES

The final work product will be the 2016 Change of Assessment Notices, updates to the ProVal CAMA software that reflect the new land schedules and updated cost, income and market models and the successful completion of appeals. The documentation produced for this project shall include a new land valuation manual that includes neighborhood descriptions, 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. All materials related to this project shall become the property of the Town of Williston.

PROJECT SCHEDULE

Proposal Submitted	April 1, 2015
Selection of Firm	May 1, 2015
Work Plan established by Contractor	June 1, 2015
50 percent inspections complete	December 1, 2015
75 percent inspections complete	March 1, 2016
100 percent inspections complete	May 1, 2016
Reappraisal Notifications	June 1, 2016

Schedule Penalties

Inspection schedule \$100 per day (per business day)

Reappraisal Notifications \$500 per day (calendar)

Project status meetings will be scheduled on an as needed basis.

4. ADMINISTRATIVE INSTRUCTIONS

The proposals are due by 4:00 pm April 1, 2015. Proposals shall be submitted in electronic form (delivery confirmation required) to r ransom@willistonvt.org or three (3) complete proposals shall be submitted in a sealed envelope, clearly marked **2016 WILLISTON REAPPRAISAL** and addressed to:

**Williston Assessor
7900 Williston Road
Williston, VT 05495**

The work shall not be assigned or sublet without previous consent of the Town of Williston and the contractor 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 Williston.

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 Williston shall be final and binding. The Town of Williston may make any corrections of errors or omissions in the Request for Proposal when such correction is necessary for the proper fulfillment of their intention as construed by the Town of Williston.

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 (41CFR Part 60) The Contractor shall comply with all 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 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 Williston 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 Contractors employees, agents of sub-Contractors 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, attorneys' fees, costs of investigation and of defense.

6. AVAILABLE INFORMATION

- Tax map and parcel data
- Examples of current land schedules and ProVal manuals
- Property descriptions from the current CAMA System

7. QUALIFICATIONS AND EVALUATION

The proposal should include the following:

- (1) scope of services
- (2) professional qualifications and names of the principals of the firm
- (3) the qualifications of the project manager and key staff assigned to the project
- (4) description of the proposed methodologies for assessing values on each class of property
- (5) description of quality control and testing of results
- (6) the cost proposal
- (7) schedule of work by task
- (8) List of all municipal reappraisals currently underway or completed within the last five years including client contacts and references.
- (9) Number of Inspectors to be employed

The evaluation of the proposals will be based on:

- Firm's understanding of the scope
- Proposed methodology for completing the work
- Qualifications of the firm and personnel dedicated to the project
- Work on similar projects
- Cost proposal
- In-house availability of all necessary equipment to perform required services

8. TOWN CONTACT

Bill Hinman Assessor
Town of Williston
7900 Williston Road
Williston, VT 05495
Telephone: (802) 878-1091
Fax: (802) 878-1353
E-Mail: HinmanL@yahoo.com

9. ATTACHMENTS

Copy 2014 Vermont Form 411

02/03/2015
02:18 pm

Williston 2014 Billed Grand List
Form 411 - (Town code: 759)
Main District

(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	Non-Resi Ed. Listed Value	Total Education Listed Value
Residential I R1	2,960	845,333,510	743,703,090	101,630,420	845,333,510
Residential II R2	242	118,199,590	104,667,490	13,532,100	118,199,590
Mobile Homes-U MHU	140	18,071,150	15,926,980	2,144,170	18,071,150
Mobile Homes-L MHL	125	16,888,130	14,408,230	2,479,900	16,888,130
Seasonal I S1	13	3,544,150	0	3,544,150	3,544,150
Seasonal II S2	0	0	0	0	0
Commercial C	330	439,818,630	285,680	439,532,950	439,818,630
Commercial Apts CA	3	4,429,130	0	4,429,130	4,429,130
Industrial I	77	132,938,470	0	132,938,470	132,938,470
Utilities-E UE	4	66,765,290	0	66,765,290	66,765,290
Utilities-O UO	2	4,301,600	0	4,301,600	4,301,600
Farm F	11	8,751,990	3,662,650	5,089,340	8,751,990
Other O	0	0	0	0	0
Woodland W	0	0	0	0	0
Miscellaneous M	179	30,302,240	1,626,810	28,675,430	30,302,240
TOTAL LISTED REAL	4,086	1,689,343,880	884,280,930	805,062,950	1,689,343,880
P.P. Cable	1	1,894,110		1,894,110	1,894,110
P.P. Equipment	0	0			
P.P. Inventory	0	0			
TOTAL LISTED P.P.	1	1,894,110		1,894,110	1,894,110
TOTAL LISTED VALUE		1,691,237,990	884,280,930	806,957,060	1,691,237,990
EXEMPTIONS					
Veterans 10K	21	210,000	190,000	20,000	210,000
Veterans >10K		630,000			
Total Veterans		840,000	190,000	20,000	210,000
P.P. Contracts	0	0			
Contracts Apprv VEPC	0	0	0	0	0
Grandfathered	0	0	0	0	0
Non-Apprv (voted)	30	279,300			
Owner Pays Ed Tax	0	0			
Total Contracts	30	279,300	0	0	0
Farm Stab Apprv VEPC	0	0	0	0	0
Farm Grandfathered	0	0	0	0	0
Non-Apprv (voted)	0	0			
Owner Pays Ed Tax	0	0			
Total FarmStab Contr	0	0	0	0	0
Current Use	37	8,107,648	3,843,051	4,264,597	8,107,648
Special Exemptions	9		0	470,423	470,423
Partial Statutory	0	0	0	0	0
Sub-total Exemptions		9,226,948	4,033,051	4,755,020	8,788,071
Total Exemptions		9,226,948	4,033,051	4,755,020	8,788,071