

**REQUEST FOR QUALIFICATIONS
FOR
TOWN OF ESSEX AND CITY OF ESSEX JUNCTION
VERMONT**



TOWN AND CITY-WIDE REAPPRAISAL

ISSUED BY:

**TOWN OF ESSEX
81 Main Street
Essex Junction, VT 05452**

**Date of Issue
September 13, 2022**

**Due Date for Qualifications
October 13, 2022**

TOWN AND CITY-WIDE REAPPRAISAL

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**REQUEST FOR QUALIFICATIONS
FOR
TOWN AND CITY-WIDE REAPPRAISAL**

The Town of Essex and the City of Essex Junction (hereinafter collectively referred to as Essex) are requesting Qualifications from qualified, licensed reappraisal contractors to work with the Town of Essex Assessor to complete a Town and City-Wide reappraisal for the 2025 Grand List. 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 Essex. Qualifications are due by 4:00pm, October 13, 2022. Copies of this Request for Qualifications may be obtained by calling the Assessor, Karen K. Lemnah, at the Town Offices; (802) 878-1345 or e-mail; klemnah@essex.org

INTRODUCTION

Until recently, the Village of Essex Junction was an incorporated village within the Town of Essex; all Village properties were also properties within the Town. Due to a recent legislative change in charter status, the Village of Essex Junction is now the City of Essex Junction and is a separate municipality from the Town. This request for reappraisal services includes both municipalities.

When incorporated with the former Village of Essex Junction, the Town of Essex was the second most populous incorporated area in Chittenden County and the entire State of Vermont.

The two municipalities include a broad mix of land uses including commercial, residential, industrial, mixed use, condominiums, and vacant land.

Combined parcel breakdown, as of August 15, 2022, is as follows (please see attached Form 411-page 1 only, parcel report)

Residential I	4,886
Residential II	426
Mobile Homes Unlanded	20
Mobile Landed	23
Seasonal I	0
Seasonal II	0
Commercial	319
Commercial Apartments	47
Industrial	29
Utilities (Electric)	18
Utilities (Other)	2
Farm	6
Other (Condominiums)	1,870
Woodland	0
Miscellaneous (Vacant Land)	223
Personal Property Cable	4
Sub-Total (Taxable Parcels)	7,873
Inactive/Contiguous Parcels	238
Exempt/Non-Taxable	142
Total Properties	8,253

Essex was last reappraised in 2007 by Tyler Technologies, Inc. / CLT Appraisal & Tax Services. Essex currently uses MICROSOLVE CAMA software provided by New England Municipal Resource Center (NEMRC). All properties are currently listed using this software, but Essex is actively investigating the possibility of switching to a different CAMA software system. 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 use and any cost to Essex for the conversion from MICROSOLVE to this new software.

1. DESCRIPTION OF PROJECT

The reappraisal project shall involve development of new land schedules and neighborhood delineations to estimate land values for every site in Essex; interior and exterior inspections or an equivalent method to produce accurate results for all properties; detailed analysis of all sales over a three-year period 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 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 the Town of Essex Assessor throughout the project. The Town will provide mailing services, access to the existing CAMA system, and all documentation from the previous (2007) reappraisal.

The contractor will be responsible for all aspects of the reappraisal.

Project Purpose and Objectives

The objective of this reappraisal is to generate accurate, defensible estimates of the fair market value for every property in the Essex as of April 1, 2025. 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 the last three (3) 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 Essex. The new land

schedules must also produce current Act 68 Homestead and House site values where applicable.

- e) The contractor shall produce new models in the appraisal software system for cost and depreciation, sales comparison, and any other applicable valuation methods for all types of real property in Essex.
- f) The contractor shall test the various computer models against the existing sales data to verify the 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 Essex.
- h) The contractor, working in Essex, shall produce a Change of Assessment Notice including every assessment change to be mailed to every taxpayer as the official notification.
- i) The contractor shall conduct informal hearings for taxpayers to question the new assessment values and shall assist Essex with the formal Assessor grievances and Civil Board of Authority appeals. Contractor shall provide a price for defense at State Board of Appraisers or Superior Court appeals.
- j) The contractor shall produce manuals clearly explaining the valuation methods, the data, and the processes to aid Essex in defending the new assessments, maintaining the new CAMA software system, and valuing new properties, subdivisions, and changes to existing properties.
- k) The contractor shall complete all 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 Qualifications shall include a work schedule and a 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.

4. ADMINISTRATIVE INSTRUCTIONS

The Qualifications must be received by 4:00pm October 13, 2022. E-mail submittal preferred. Qualifications 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 Qualifications will be accepted.

Submit digital copy to: Karen K. Lemnah
klemnah@essex.org

Hard copy submittal is an acceptable alternative. Send three (3) complete Qualifications in a sealed envelope, clearly marked **Town and City-Wide Reappraisal** to:

**Town of Essex
c/o Karen K. Lemnah, Assessor
81 Main Street
Essex Junction, VT 05452**

The Qualifications shall 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) Schedule of work by task, including completion date
- (7) List of all municipal reappraisals currently underway or completed within the last three years including client contacts and references.
- (8) Number of Inspectors to be employed
- (9) Description of the type of CAMA software used for the reappraisal and resulting data. Description shall include benefits and functionality of software.

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

This Request for Qualifications 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 Essex shall be final and binding. Any corrections of errors or omissions in the Request for Qualifications may be made by Essex when such correction is necessary for the proper fulfillment of their intention as construed by Essex.

Cost of Qualifications Preparation

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

Essex Rights

Essex reserves the right to select the consultant that, in the best judgment of Essex will perform in a timely manner irrespective of the estimated fee for completing the project. Essex 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 Essex from the payment of any sum of money to any person whomsoever 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, suits, costs, attorneys' fees, costs of investigation and of the defense.

Bonding

A performance bond shall be required. The Contractor shall deliver to Essex, an executed bond in the principal sum of the amount to be paid by Essex to the Contractor as security for the faithful and satisfactory performance of this contract.

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:

- 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
- Work Schedule
- Functionality of CAMA software that will be used

8. TOWN CONTACT

Karen K. Lemnah, Assessor
Town of Essex
81 Main Street
Essex Junction, VT 05452
802-878-1345

Town of Essex 2022 As Billed Grand List
Form 411 - (Town code: 207)
For All Parcels Main District- All scl districts

(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	4,886	1,405,604,100	1,175,199,900	230,404,200	1,405,604,100
Residential II R2	426	177,663,000	147,681,500	29,981,500	177,663,000
Mobile Homes-U MHU	20	576,400	299,500	276,900	576,400
Mobile Homes-L MHL	23	3,774,800	2,261,400	1,513,400	3,774,800
Seasonal I S1	0	0	0	0	0
Seasonal II S2	0	0	0	0	0
Commercial C	319	321,176,100	1,300,960	319,875,140	321,176,100
Commercial Apts CA	47	139,827,400	0	139,827,400	139,827,400
Industrial I	29	173,455,900	0	173,455,900	173,455,900
Utilities-E UE	18	54,439,000	0	54,439,000	54,439,000
Utilities-O UO	2	32,952,000	0	32,952,000	32,952,000
Farm F	6	2,846,600	1,451,500	1,395,100	2,846,600
Other O	1,870	397,907,787	300,671,225	97,236,562	397,907,787
Woodland W	0	0	0	0	0
Miscellaneous M	223	26,348,600	235,300	26,113,300	26,348,600
TOTAL LISTED REAL	7,869	2,736,571,687	1,629,101,285	1,107,470,402	2,736,571,687
P.P. Cable	4	3,019,551		3,019,551	3,019,551
P.P. Equipment	0	0			
P.P. Inventory	0	0			
TOTAL LISTED P.P.	4	3,019,551		3,019,551	3,019,551
TOTAL LISTED VALUE		2,739,591,238	1,629,101,285	1,110,489,953	2,739,591,238
EXEMPTIONS					
Veterans 10K	76/76	760,000	690,000	70,000	760,000
Veterans >10K		2,280,000			
Total Veterans		3,040,000	690,000	70,000	760,000
P.P. Contracts	4	3,019,551			
Contract Apprv VEPC	0/0	0	0	0	0
Grandfathered	0/0	0	0	0	0
Non-Apprv(voted)	0/0	0			
Owner Pays Ed Tax	0/0	0			
Total Contracts	4/0	3,019,551	0	0	0
FarmStab Apprv VEPC	0/0	0	0	0	0
Farm Grandfathered	0/0	0	0	0	0
Non-Apprv(voted)	10/10	1,158,300			
Owner Pays Ed Tax	0/0	0			
Total FarmStabContr	10/10	1,158,300	0	0	0
Current Use	51/51	5,129,100	1,966,300	3,162,800	5,129,100
Special Exemptions	18		0	8,150,358	8,150,358
Partial Statutory	0/0	0	0	0	0
Sub-total Exemptions		12,346,951	2,656,300	11,383,158	14,039,458
Total Exemptions		12,346,951	2,656,300	11,383,158	14,039,458
TOTAL MUNICIPAL GRAND LIST		27,272,442.87			
TOTAL EDUCATION GRAND LIST			16,264,449.85	10,991,067.95	27,255,517.80
NON-TAX	142	NON-TAX PARCELS ARE NOT INCLUDED ON THE 411			