

# TOWN OF NORWICH

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## REQUEST FOR PROPOSALS

### Appraisal Services for Town-wide Reappraisal

October 27, 2022

#### Overview

The Town of Norwich is requesting proposals from qualified, licensed and certified reappraisal contractors to complete a town-wide reappraisal of all real property in Norwich.

The Town of Norwich in eastern Windsor County, Vermont is bounded to the east by the Connecticut River, the Appalachian Trail crosses the town along its southern border. The population of the Town of Norwich was estimated at 3,612 as of the 2020 census. Norwich's land mass is approximately 44.4 square miles. The town has easy access to Interstate 91. The Norwich School District is part of the inter-state Dresden School District with Hanover, New Hampshire.

#### Background

Norwich has a mix of residential, commercial, agricultural and forest lands, 155 parcels (13, 809 acres) , or 55.7 percent of all land is enrolled in the State of Vermont's current use program for tax year 2022. Norwich has a Fire District that supplies municipal water to about 350 residences, businesses, and the Norwich grade school. Norwich has zoning and subdivision regulations with five zoning districts, 97 percent of the land area lies in the rural-residential zoning district. The 2022 Common Level of Appraisal (CLA) was 84.39% and the Coefficient of Dispersion (COD) was 13.49%. Norwich completed its last town-wide appraisal in 2016. Since then, numerous residential sales have occurred at values well above assessments. Vacant land sales have also been at levels above assessments on a per-acre basis.

The 2022 Grand List has 1,581 taxable parcels broken out on the attached 2022 Form 411. (See Exhibit A). The selected contractor will also collect data and take photos of 57 non-taxable parcels and 169 inactive parcels.

The town currently contracts with Patriot Properties Inc. and uses AssessPro Computer Assisted Mass Appraisal (CAMA) software. Responses to this RFP may propose a different CAMA program but would have the obligation of demonstrating any alternative CAMA software prior to the submittal date for this RFP.

#### Description of Project

The Town of Norwich's town-wide reappraisal project shall include:

- The development of new land schedules and neighborhood delineations to estimate land values for every site in town
- Detailed analysis of sales over a three-year period to formulate accurate, localized cost and depreciation schedules to develop a market adjusted cost approach for all property types
- Depreciation schedules shall adhere to standard AssessPro table structures (or if proposing alternate CAMA software demonstrate compliance with VTPIE) (see below)
- The reappraisal project will be completed with software capable of integrating with the new Axiomatic

Grand List software as used by the Vermont Property Information Exchange (VTPIE) as implemented by the Vermont Division of Property Valuation and Review (PVR)

- Multiple digital photos of each property
- Interior and exterior measurements and physical inspections of all properties to gather accurate and pertinent information.

These and any other applicable methods, shall be incorporated into the existing or cloud based AssessPro CAMA software system and the existing property listing data will be reviewed to assure compliance with new analyses.

The Contractor will work closely with the Norwich Board of Listers and Assessor and throughout the project. The Board of Listers and Town Assessor will coordinate with the Contractor's designated lead. The Town will provide access to the existing CAMA system and all documentation from the previous 2016 reappraisal as well as data from any neighborhood inspections.

### Scope of Services

1. The contractor shall review existing AssessPro CAMA property descriptions, neighborhood delineations, tax maps, zoning descriptions and other relevant information to understand the current assessment system
2. The contractor shall analyze three years of sales information, verifying the sales information and correcting, as needed, the associated assessment information
3. 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. These new schedules must produce current Act #60 Homestead site values.
4. The contractor will visit each property for the purpose of completing an interior inspection of all Residential (year-round and seasonal), Condominium, Farm/Agricultural and Commercial buildings and will update sketches and multiple photos for each property
5. The contractor will provide weekly updates on a supplied spreadsheet (See Exhibit B)
6. The contractor shall produce new models in the cloud based AssessPro 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 Norwich (or alternative CAMA software pending demonstration to Listers and Assessor)
7. The contractor shall review existing CAMA/NEMRC/VTPIE property descriptions to assure compliance with new market models for valuation
8. The contractor shall produce, review, and verify fair market value estimates for every property in Norwich. Each parcel file shall include a CAMA cost sheet and property record card. This new data will be available online
9. A Proposed Property Value Report listing all properties will be produced and mailed by the contractor to all property owners at the contractor's expense
10. The contractor shall schedule time for the express purpose of answering property owner questions on the proposed assessment values prior to formal grievances
11. The contractor will assist the Listers and Assessor with the formal Lister grievances and Board of Civil Authority (BCA) appeals
12. The contractor, working with the Listers and/or Assessor, shall produce a Change of Assessment Notice to be mailed to every property owner as the official notification
13. 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
14. The contractor shall complete all these activities in compliance with Vermont's "three-prong test",

- other accepted appraisal practices and conforming to all applicable State Statutes and rules
15. All data, maps, reports, forms, worksheets and other materials used for this reappraisal shall be the property of the Town of Norwich.

### 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. Multiple digital photos for each dwelling/residence uploaded to CAMA
3. A Proposed Property Value Report
4. A copy of the updated Abstract Grand List
5. Change of Assessment Notices to property owners as of April 1, 202\_
6. A copy of the Grand List to be lodged with the Town Clerk
7. Updates to the appraisal software database that reflect the new land schedules and updated cost
8. Income and market models and the successful completion of any appeals through the Board of Civil Authority level
9. The documentation produced for this project shall include:
  - a. a new land valuation manual (including neighborhood descriptions)
  - b. land schedules and descriptions of adjustments
  - c. a copy of the sales file and adjustments made to create the land schedule
  - d. copies of any other manuals, tables or reference materials developed or used during this project
10. . Implementation of new software and training, if applicable
11. All materials related to this project shall become the property of the Town of Norwich

### Response Format and Due Date

All Contractors responding to this Request for Proposal are required to submit a Proposal for Services that incorporates all the tasks outlined in this document and the following:

1. A cover letter signed by an authorized representative expressing the firm's/individual's interest in working with the Town of Norwich on this particular project, and identification of the principal individual(s) assigned to this project
2. A narrative proposal describing the approach to the Scope of Work, including a clear breakdown and explanation of tasks
3. Experience of company and individual(s) working on this project
4. A detailed budget by activity. The contract will be awarded on a fixed fee basis, the budget breakdown is used to evaluate the proposal and for any additional services during the contract period.
5. A date specific project schedule with benchmarks
6. Contact information for three references
7. Relevant work sample
8. Date available to begin

A PDF of the proposal must be submitted via email with the subject line: "Reappraisal Services" By: **10:00 a.m. November 21, 2022**, to: [listeners@norwich.vt.us](mailto:listeners@norwich.vt.us)

An email confirmation will be sent when the proposal is received. Proposals may include links to additional materials, but inclusion of lengthy supporting documents is strongly discouraged.

**Proposals received after 10:00AM November 21, 2022 will be rejected.**

**Information**

Questions about this RFP must be emailed to Cheryl Lindberg at [listeners@norwich.vt.us](mailto:listeners@norwich.vt.us). All questions and responses will be posted on the Town’s website at <https://norwich.vt.us/listers/>. Intending respondents should monitor this website for answers to questions received.

**Available Information**

1. Tax map and parcel data
2. Current land schedules
3. Property descriptions from the current CAMA system
4. Copies of completed sales verification forms

**Disclaimers**

1. Those submitting RFPs do so entirely at their own expense. There is no express or implied obligation by the Town of Norwich to reimburse any entity or individual for any costs incurred in preparing or submitting of proposals, preparing or submitting additional information requested by Selection Committee, or participating in any selection interviews.
2. The Town of Norwich reserves the right to withdraw this Request for Proposals, to accept or reject any or all proposals, or to advertise for new proposals if it is in the best interest of the Town to do so, and to award a contract as deemed to be in the best interest of the Town.

**Additional Requirements**

Sub-contracts

Work shall not be assigned or sublet to any other entity without full consent, and written permission, of the Town of Norwich. 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 Norwich.

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, Comprehensive Board Form General Liability Insurance in the amount of \$2,000,000 including protection for bodily injury and property damage with a combined single limit of \$1,000,000 aggregate. The Worker’s Compensation Insurance shall provide employer’s liability insurance in the amount of \$100,000.

Certification of Insurance shall be supplied to the Town by the Contractor detailing the above coverage prior to commencement of work. This certificate will be issued by a carrier authorized to do business within the State of Vermont.

No Warranty is made that the coverages and limits listed above are adequate to cover and protect the interests of the Consultant for the survey operations. These are solely minimums that have been developed and must be met to protect the interests of the Town. It is the express responsibility of the Contractor to obtain adequate coverage for the project.

### Indemnification

The Contractor shall and hereby agree to indemnify, save harmless and defend the Town of Norwich 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 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.

### Evaluation

The Proposal should include the following:

- Scope of services
- Professional qualifications and names of the principals of the firm
- Qualifications of the project manager and key staff assigned to the project
- Descriptions of the proposed methodologies for assessing values on each class of property
- Description of quality control and testing of results
- Schedule of work by task
- Lists of all municipal reappraisals currently underway and completed within the last five years including client contacts and references.
- Cost proposal including software fees and maintenance
- An example of a data collection form
- The Contractor shall identify property types beyond their expertise (e.g., railroads etc.)

The evaluation of the Proposal will be based on:

- Firms understanding of the scope of the work
- Suitability of CAMA software proposed (if not AssessPro)
- Proposed methodology for completing the work
- Qualifications of the firm
- Work and experience on similar projects in VT
- Work Schedule
- Cost proposal

Norwich 2022 Billed Grand List  
 Form 411 - (Town code: 450)  
 In All 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	827	356,783,200	262,272,552	94,510,648	356,783,200
Residential II R2	506	350,097,400	230,762,580	119,334,820	350,097,400
Mobile Homes-U MHU	2	5,700	0	5,700	5,700
Mobile Homes-L MHL	11	1,831,900	738,100	1,093,800	1,831,900
Seasonal I S1	4	427,100	0	427,100	427,100
Seasonal II S2	11	3,159,900	0	3,159,900	3,159,900
Commercial C	43	31,944,700	0	31,944,700	31,944,700
Commercial Apts CA	7	6,839,900	0	6,839,900	6,839,900
Industrial I	0	0	0	0	0
Utilities-E UE	7	11,278,600	0	11,278,600	11,278,600
Utilities-O UO	0	0	0	0	0
Farm F	10	8,358,400	6,676,869	1,681,531	8,358,400
Other O	28	7,685,800	4,680,700	3,005,100	7,685,800
Woodland W	0	0	0	0	0
Miscellaneous M	124	23,180,400	0	23,180,400	23,180,400
<b>TOTAL LISTED REAL</b>	<b>1,580</b>	<b>801,593,000</b>	<b>505,130,801</b>	<b>296,462,199</b>	<b>801,593,000</b>
P.P. Cable	1	1,177,179		1,177,179	1,177,179
P.P. Equipment	0	0			
P.P. Inventory	0	0			
<b>TOTAL LISTED P.P.</b>	<b>1</b>	<b>1,177,179</b>		<b>1,177,179</b>	<b>1,177,179</b>
<b>TOTAL LISTED VALUE</b>		<b>802,770,179</b>	<b>505,130,801</b>	<b>297,639,378</b>	<b>802,770,179</b>
<b>EXEMPTIONS</b>					
Veterans 10K	7/7	70,000	60,000	10,000	70,000
Veterans >10K		210,000			
<b>Total Veterans</b>		<b>280,000</b>	<b>60,000</b>	<b>10,000</b>	<b>70,000</b>
P.P. Contracts	1	1,177,179			
Contract Apprv VEPC	0/0	0	0	0	0
Grandfathered	0/0	0	0	0	0
Non-Apprv (voted)	8/8	806,700			
Owner Pays Ed Tax	0/0	0			
<b>Total Contracts</b>	<b>9/8</b>	<b>1,983,879</b>	<b>0</b>	<b>0</b>	<b>0</b>
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			
<b>Total FarmStabContr</b>	<b>0/0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>
Current Use	156/156	36,627,362	16,685,763	19,941,599	36,627,362
Special Exemptions	4		0	946,900	946,900
Partial Statutory	0/0	0	0	0	0
<b>Sub-total Exemptions</b>		<b>38,891,241</b>	<b>16,745,763</b>	<b>20,898,499</b>	<b>37,644,262</b>
<b>Total Exemptions</b>		<b>38,891,241</b>	<b>16,745,763</b>	<b>20,898,499</b>	<b>37,644,262</b>
<b>TOTAL MUNICIPAL GRAND LIST</b>		<b>7,638,789.38</b>			
<b>TOTAL EDUCATION GRAND LIST</b>			<b>4,883,850.38</b>	<b>2,767,408.79</b>	<b>7,651,259.17</b>
<b>NON-TAX</b>		<b>57 NON-TAX PARCELS ARE NOT INCLUDED ON THE 411</b>			

Norwich 2022 Billed Grand List  
 Form 411 - (Town code: 450)  
 In All 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
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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	0
Grandfathered Contracts/Exemptions	0
Non-Approved (Voted) Contracts/Exemptions	806,700
Homestead Non-Approved (Voted) Contracts/Exemptions	35,600
Nonhmstd Non-Approved (Voted) Contracts/Exemptions	771,100
Municipal Contracts (Owner Pays Ed Tax)	0
Special Exemptions	946,900
Current Use (Use Value Appraisal Program)	36,627,362
Veteran Exemptions	70,000
Homestead Veteran Exemptions beyond 10K	180,000
Nonhmstd Veteran Exemptions beyond 10K	30,000
Partial Statutory Exemptions	0

# Norwich, Vermont - Progress Study

Date: 16-Oct-12

EXHIBIT B

Class	Description	Number	Ltr Sent	Measured	Total Inspected	Insp by Appt	Valued	% Valued
R1	Residence on less than 6 acres	795	505	512	339	209		
R2	Residence on 6 acres or more	490	490	490	350	174		
MHU	Mobile Home Un-landed	2	2	2	1	1		
MHL	Mobile Home Landed	13	13	12	8	6		
S1	Seasonal on less than 6 acres	0	0					
S2	Seasonal on 6 acres or more	0	0					
C	Commercial property	49	0	14	7	2		
CA	Commercial Apartments	7	0					
I	Industrial	0	0					
UE	Utilities Electric	4	0					
UO	Utilities Other	2	0					
F	Farm	13	11	11	7	2		
W	Woodland	0	0					
O	Other (Condos, Senior and Low income Housing)	40	40	14	6			
M	Miscellaneous (Vacant Land)	289	123	123				
E	Exempt Property	56	27	27	19			
CABLE	Cable Television and data transmission networks	1	0					
	<b>Total</b>	<b>1761</b>	<b>1211</b>	<b>1205</b>	<b>737</b>	<b>394</b>	<b>0</b>	

Improved Listing Percent Entry      1415      1088      1082      737      68.11%

Class	Description	Number	Planned					Total
			2nd H 2011	1st Q 2012	2nd Q 2012	3rd Q 2012	4thQ 2012	
R1	Residence on less than 6 acres	795	100	166	139	100	287	792
R2	Residence on 6 acres or more	489	161	115	157	57		490
MHU	Mobile Home Un-landed	2	1	1	0	0		2
MHL	Mobile Home Landed	16	8	3	1	1		13
S1	Seasonal on less than 6 acres	0	0	0	1	0		1
S2	Seasonal on 6 acres or more	0	0	0	0	0		0
C	Commercial property	49	0	1	0	0	84	85
CA	Commercial Apartments	7	0	0	1	0	9	10
I	Industrial	0	0	0	0	0		0
UE	Utilities Electric	4	0	0	0	0	4	4
UO	Utilities Other	2	0	0	0	0	2	2
F	Farm	13	2	8	1	0		11
W	Woodland	0	0	0	0	0		0
O	Other (Condos, Senior and Low income Housing)	40	0	0	13	27		40
M	Miscellaneous (Vacant Land)	289	52	33	38	32		155
E	Exempt Property	56	11	8	7			26
CABLE	Cable Television and data transmission networks	1	0	0	0	0	1	1
	<b>Total</b>	<b>1763</b>	<b>335</b>	<b>335</b>	<b>358</b>	<b>217</b>	<b>387</b>	<b>1632</b>