

TOWN OF HARTFORD
REQUEST FOR PROPOSALS

For

2025 TOWN-WIDE REAPPRAISAL



ISSUED BY

TOWN OF HARTFORD

171 Bridge Street

White River Jct., VT 05001

Date of Issuance:

October 2, 2023

Response Deadline:

October 30, 2023

The Town of Hartford is requesting proposals from qualified, certified reappraisal contactors to work with the Hartford Assessor's office to complete a town-wide reappraisal for the 2025 Grand List. The most recent town wide reappraisal was done in 2017.

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 Hartford.

Proposals are due by 4:00 pm, October 30, 2023. Copies of this Request for Proposal may be obtained by calling the Assessor's office at (802) 295-3077, or by email at assessors@hartford-vt.org

This request for proposal is intended to be explanatory, but should any discrepancy arise, or any misunderstanding arise as to the intent of anything contained herewith, the interpretation and decision of the Town of Hartford shall be final and binding. Any corrections of errors or omissions in the request for proposal may be made by the Town of Hartford when such a correction is necessary for the proper fulfillment of their intention as construed by the Town of Hartford.

INTRODUCTION

The Town of Hartford is situated in the northeast section of Windsor County, Vermont, on the New Hampshire-Vermont border and at the confluence of the Connecticut and White Rivers. Hartford is approximately 46 square miles. There were an estimated 10,764 residents as of the 2022 census on a mix of residential, agricultural, and commercial properties. There are five villages within the Town of Hartford: Hartford, Quechee, West Hartford, Wilder, and White River Junction. Hartford, along with Lebanon and Hanover, New Hampshire, are the core municipalities of the Upper Valley area. The economy of the area is unique in that it crosses state borders and is anchored by Dartmouth Hitchcock Hospital and Dartmouth College.

Hartford has a broad mix of land uses including commercial, industrial, retail, residential, a Tax Increment Finance (TIF) district, and agriculture.

The 2022 Equalization Study Results computed a CLA (Common Level of Appraisal) of 77.15%, and a COD (coefficient of Dispersion) of 20.28%. In the 2022 Grand List there were 5,548 taxable and 181 tax-exempt parcels. There is one TIF District with 98 parcels. The taxable parcel breakout was as follows by category code:

R1	Residential 1	2,847
R2	Residential 2	405
MHU	Mob Home – No Land	308
MHL	Mob Home - Land	105
S1	Seasonal 1	20
S2	Seasonal 2	1
C	Commercial	319
CA	Commercial Apts	66
I	Industrial	7
UE	Utilities – Electric	28
UO	Utilities – Other	1

F	Farm	22
O	Other	1,097
W	Woodland	0
M	Vacant Land	321
	Sub-Total	5,548
	Exempt Parcels	181
	Total Parcels	5,729

The above parcel count includes a wide diversity of property types, including 5 mobile home parks, a commercial area at the junction of Interstates 89 and 91, affordable housing projects, 53 parcels in the Use Value Appraisal program (Current Use), the historic downtown White River Junction area and the Wilder Hydro Dam (41,000KV). Also, within the town is Quechee Lakes, a private community with approximately 1800 parcels and a mixture of single-family residences, condominiums and vacant land. Amenities include a clubhouse, small ski area, two golf courses and tennis courts.

The town was reappraised in 2017 by Vision Government Solutions, Inc. and is currently utilizing the Vision CAMA system, Version 8.2.14.

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 and depreciation schedules will adhere to the standard CAMA table structure. Development of pro-rated share of Quechee Lakes common area values assigned to each member’s property assessment.
- 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 market adjusted cost approach for assessing all types of properties
- The contractor will utilize the existing Vision CAMA package and provide complete appraisal services within the context of the CAMA system.
- The contractor will work closely with the Hartford Assessors throughout the project.

- The Town will provide access to the existing CAMA system and all documentation from the previous (2017) reappraisal. A full measure and list reappraisal was conducted in 2017. The Assessor's office has performed interior inspections for all building permits, when possible.
- Preference is for this project to commence January 2024 and conclude June 2025.

AVAILABLE SUPPORTING INFORMATION

- Tax Map and parcel data
- Current land schedules
- Access to current CAMA system (Vision)
- Copies of completed Sales Verification Forms
- Temporary office space in Assessor's office

1. SCOPE OF SERVICES

- A) The reappraisal project requires the complete appraisal of all taxable, exempt, and non-taxable properties within the Town of Hartford.
- B) The contractor will provide a project plan within two weeks of the execution of an agreement with the Town. All personnel utilized by the contractor shall provide resumes and are subject to approval by the Town.
- C) The contractor shall review existing CAMA property descriptions, neighborhood delineations, tax maps, and other relevant information to understand the current assessment system.
- D) The contractor shall analyze two years of sales information, verifying the sales information and correcting, as needed, the associated assessment information.
- E) The contractor shall prepare and analyze income and expense data, and market rental information from applicable commercial and industrial properties. Capitalization and discount rates will be developed for review by the Town based on current investment criteria.
- F) The contractor shall review and refine neighborhood delineations, analyze vacant and improved property sales and develop land-pricing schedules and produce current Act 60 Homestead site values.
- G) The contractor will visit each property, with or without Assessor assistance, for purposes of completing an exterior and interior inspection of all Residential (year-round and seasonal), Condominium, Farm and Commercial buildings and will update all sketches and photos for each property.
- H) The selected contractor will collect data and take pictures of properties.
- I) The contractor shall produce new models in the CAMA system for cost and depreciation, sales comparison, market research analysis (MRA), income and any other applicable valuation methods for all types of real property in Hartford.
- J) 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.

- K) The contractor shall produce, review and verify fair market value estimates for every property in Hartford, resulting in a new property record card.
- L) The contractor, working with the Town, shall produce a Change of Assessment Notice to be mailed to every property owner as the official notification.
- M) The contractor shall conduct informal hearings for taxpayers to question the new assessment values and shall assist the Town with the formal Lister's grievances and Board of Civil Authority appeals.
- 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, 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.
- O) The contractor shall complete all activities in compliance with Vermont's "Three-Prong Test" and accepted appraisal practices, conforming to all applicable state statutes and rules. The reappraisal must be certified by the Tax Department of the State of Vermont.
- P) All data, maps, reports, forms, and worksheets used or developed for this reappraisal shall be the property of the Town of Hartford
- Q) Contractor will develop, maintain, and share a spreadsheet containing status of work with a detailed sheet tracking status of property visits.
- R) The Assessor's office will provide the following services:
 - Mail Income & Expense forms (either town-developed forms or contractor-provided forms)
 - Complete listing of building permits for 2025 Grand List
- S) **The Wilder Hydro Dam will be valued separately and is not part of this RFP.**

2. DELIVERABLES

- A) Updates to the CAMA software that reflect the new land schedules and update cost, income and market models
- B) A new land valuation manual that includes neighborhood delineations, 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 data collection or review manuals
- E) Tables or reference materials developed or used during this project.
- F) New or updated property record cards for each parcel (Properties with multiple residences shall have a property record for each residence).

- G) Source information used in the development of the cost, sales comparison and income approach schedules; source information for individual property valuations.
- H) All manual and computerized reports supporting valuation formulas and values for vacant land and improved properties; all sales ratio studies used in the project.

3. PROJECT SCHEDULE

Advertise	October 2, 2023
Proposal Submittal	October 30, 2023
Selection of Firm	November 30, 2023
Work Plan established by Contractor	(approved by Town)
Deliver preliminary Grand List	May 1, 2025
Reappraisal Notification mailed on or before	May 15, 2025
File Taxable Grand List	June 30, 2025

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

4. ADMINISTRATIVE INSTRUCTIONS

All proposals must be received no later than 4:00 pm October 30, 2023. The proposals will be opened publicly in the Town Managers office at 4:00 pm on October 30, 2023. All proposals submitted shall include 2 copies of the proposal and arrive in a sealed envelope clearly marked “**2025 REAPPRAISAL SERVICES PROPOSAL**”. Proposals and/or modifications received after this time shall remain unopened and shall be rejected.

Send the proposal to:

**Richard Vincent, Assessor
Town Manager’s Office
Town of Hartford
171 Bridge St
White River Jct., VT 05001**

The proposed work shall not be assigned or subcontracted without previous consent of the Town of Hartford and 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 Hartford. The Town of Hartford reserves the right to reject any and or all proposals.

5. 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) A detailed budget by activity. The contract will be awarded on a fixed fee basis. The budget breakdown is used to evaluate the proposal.
- H) List of all municipal reappraisals currently underway or completed within the last five years including contacts and references.

The evaluation of the proposal will be based on:

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

6. Insurance

The contractor shall maintain during the life of the project, Comprehensive Broad 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.

The company shall also maintain Automobile Liability Insurance providing limits of \$1,000,000 per occurrence, and Umbrella or Excess Liability Insurance in the amount of \$1,000,000 aggregate. Worker' Compensation Insurance shall provide employer's liability insurance in the amount of \$100,000.

Certificates of Insurance shall be supplied to the Town by the Company 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.

TOWN CONTACT

For questions regarding the RFP, contact:

Rick Vincent, Assessor

Assessor's Office

Town of Hartford

171 Bridge Street

White River Jct., VT 05001

Telephone: (802) 295-3077

Email: rvincent@hartford-vt.org

ATTACHMENTS:

Town of Hartford 411 dated 06-02-2023, Vision LA4 Report

(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	Nonmatd Ed. Listed Value	Total Education Listed Value
Residential I R1	2,847	683,584,000	397,061,500	286,522,500	683,584,000
Residential II R2	405	156,533,300	91,577,900	64,955,400	156,533,300
Mobile Homes-U MHU	308	9,909,500	6,110,300	3,799,200	9,909,500
Mobile Homes-L MHL	105	12,193,600	7,629,700	4,563,900	12,193,600
Seasonal I S1	20	232,700	0	232,700	232,700
Seasonal II S2	1	176,900	0	176,900	176,900
Commercial C	319	216,963,700	353,200	216,610,500	216,963,700
Commercial Apts CA	66	41,382,000	0	41,382,000	41,382,000
Industrial I	7	6,380,300	0	6,380,300	6,380,300
Utilities-E UE	28	86,307,100	0	86,307,100	86,307,100
Utilities-O UO	1	355,900	0	355,900	355,900
Farm F	22	11,324,900	5,606,400	5,718,500	11,324,900
Other O	1,097	169,570,400	48,889,600	120,680,800	169,570,400
Woodland W	0	0	0	0	0
Miscellaneous M	322	36,976,000	1,616,300	35,359,700	36,976,000
TOTAL LISTED REAL	5,548	1,431,890,300	558,844,900	873,045,400	1,431,890,300
P.P. Cable	1	3,223,300		3,223,300	3,223,300
P.P. Equipment	0	0			0
P.P. Inventory	0	0			0
TOTAL LISTED P.P.	1	3,223,300		3,223,300	3,223,300
TOTAL LISTED VALUE		1,435,113,600	558,844,900	876,268,700	1,435,113,600
EXEMPTIONS					
Veterans 10K	70/70	700,000	580,000	120,000	700,000
Veterans >10K		2,066,300			
Total Veterans		2,766,300	580,000	120,000	700,000
P.P. Contracts	1	3,223,300			
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	1/0	3,223,300	0	0	0
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			
Total FarmStabContr	0/0	0	0	0	0
Current Use	74/74	10,038,500	3,877,000	6,161,500	10,038,500
Special Exemptions	41		0	11,924,800	11,924,800
Partial Statutory	1/1	216,000	0	216,000	216,000
Sub-total Exemptions		16,244,100	4,457,000	18,422,300	22,879,300
TIF 1 Exemption	98 see footnote		-10,425	26,491,275	26,480,850
Total TIFs			-10,425	26,491,275	26,480,850
Total Exemptions		16,244,100	4,446,575	44,913,575	49,360,150
TOTAL MUNICIPAL GRAND LIST		14,188,695.00			
TOTAL EDUCATION GRAND LIST			5,543,983.25	8,313,551.25	13,857,534.50
NON-TAX	198	NON-TAX PARCELS ARE NOT INCLUDED ON THE 411 EXCEPT EDUCATION TIF BASE TOTALS			

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LAND USE	Parcel Count	LAND VALUE	BUILDING VALUE	TOTAL VALUE	PERCENT LAND	PERCENT BUILDING
1011-1 FAM/IN-LAW	65	5,078,900	13,826,900	18,905,800	26.86%	73.14%
101R-1 FAMILY	2999	194,918,400	591,632,700	786,551,100	24.78%	75.22%
102R-2 FAMILY	112	5,923,100	15,777,200	21,700,300	27.30%	72.70%
103R-3 FAMILY	47	2,371,000	6,794,100	9,165,100	25.87%	74.13%
104R-4 FAMILY	24	1,262,600	3,754,500	5,017,100	25.17%	74.83%
106V-VAC LAND/IMP	33	1,940,700	949,300	2,890,000	67.15%	32.85%
1090-MULTI-HOUSES	37	5,069,800	11,424,000	16,493,800	30.74%	69.26%
131U-CONDO < 6 AC	137	0	19,224,900	19,224,900	0.00%	100.00%
132U-CONDO > 6 AC	956	0	150,194,800	150,194,800	0.00%	100.00%
132V-CONDO > 6 AC	8	0	30,000	30,000	0.00%	100.00%
150T-MANUFACT HOME	417	6,672,200	15,630,200	22,302,400	29.92%	70.08%
150V-MANUFACT HM VAC	11	212,600	0	212,600	100.00%	0.00%
151T-MANU HM/INLAW	3	199,700	435,300	635,000	31.45%	68.55%
201V-1 FAMILY/1 CAMP VAC	20	44,800	187,900	232,700	19.25%	80.75%
311C-GARAGE - SERV/SALES	11	5,632,900	15,737,200	21,370,100	26.36%	73.64%
312C-FILLING STATION/GARAGE	1	189,000	200,300	389,300	48.55%	51.45%
313C-AUTO REPAIR	14	1,159,900	2,383,900	3,543,800	32.73%	67.27%
313I-AUTO REPAIR	1	157,400	966,400	1,123,800	14.01%	85.99%
314C-CAR WASH	2	319,600	613,100	932,700	34.27%	65.73%

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LAND USE	Parcel Count	LAND VALUE	BUILDING VALUE	TOTAL VALUE	PERCENT LAND	PERCENT BUILDING
316C-TRUCK TERMINAL	1	84,200	71,900	156,100	53.94%	46.06%
326C-RADIO STUDIO/ BROADCASTING AN	1	0	0	0	0.00%	0.00%
326V-RADIO STUDIO/ BROADCASTING AN	9	169,800	2,407,700	2,577,500	6.59%	93.41%
328C-TELEPHONE & TELEGRAPH	2	67,900	106,200	174,100	39.00%	61.00%
331C-BUSINESS BLOCKS	1	86,400	1,094,200	1,180,600	7.32%	92.68%
332C-OFFICE BLDG	47	4,647,700	27,352,900	32,000,600	14.52%	85.48%
332I-OFFICE BLDG	1	170,000	319,400	489,400	34.74%	65.26%
332U-OFFICE BLDG	44	0	13,162,200	13,162,200	0.00%	100.00%
332V-OFFICE BLDG	1	0	0	0	0.00%	0.00%
333C-APTS 5+	62	4,700,200	26,291,700	30,991,900	15.17%	84.83%
333R-APTS 5+	2	136,100	610,800	746,900	18.22%	81.78%
334C-BANK BLDG	7	894,800	6,525,800	7,420,600	12.06%	87.94%
337C-MANUFACT HM PARK	1	261,600	1,496,800	1,758,400	14.88%	85.12%
337R-MANUFACT HM PARK	2	316,900	1,556,700	1,873,600	16.91%	83.09%
337V-MANUFACT HM PARK	3	457,600	989,500	1,447,100	31.62%	68.38%
347C-GENERAL WAREHOUSE	40	6,114,300	18,585,800	24,700,100	24.75%	75.25%
347I-GENERAL WAREHOUSE	4	923,100	2,277,400	3,200,500	28.84%	71.16%
351C-HOTEL	7	1,496,700	19,853,700	21,350,400	7.01%	92.99%
352C-MOTEL	4	415,700	2,645,700	3,061,400	13.58%	86.42%

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LAND USE	Parcel Count	LAND VALUE	BUILDING VALUE	TOTAL VALUE	PERCENT LAND	PERCENT BUILDING
353C-INN/TOURIST HOME	5	680,800	3,306,300	3,987,100	17.08%	82.92%
356C-RESTAURANT	11	1,127,100	2,979,300	4,106,400	27.45%	72.55%
360C-SERVICE/HEALTH	3	270,100	696,500	966,600	27.94%	72.06%
362C-NURSING HOME	3	1,328,000	23,000,100	24,328,100	5.46%	94.54%
363C-FUNERAL HM/CREM	1	64,000	505,100	569,100	11.25%	88.75%
381C-SALES - SMALL RETAIL	36	5,849,500	13,682,100	19,531,600	29.95%	70.05%
382C-SUPERMARKET	1	83,400	613,300	696,700	11.97%	88.03%
390C-COMMERCIAL USE	19	2,023,800	9,459,000	11,482,800	17.62%	82.38%
390R-COMMERCIAL USE	3	535,800	243,200	779,000	68.78%	31.22%
391C-OFFICE/APTS	10	686,200	2,017,000	2,703,200	25.38%	74.62%
393C-STORE/APTS	32	2,467,900	14,520,600	16,988,500	14.53%	85.47%
405V-OTHER ENERGY PRODUCTS	11	524,500	5,131,000	5,655,500	9.27%	90.73%
410C-ELECTRIC	1	400,000	32,042,700	32,442,700	1.23%	98.77%
410V-ELECTRIC VAC	21	874,100	48,139,200	49,013,300	1.78%	98.22%
450V-OTHER INDUSTRIAL VAC	1	0	874,900	874,900	0.00%	100.00%
455C-LIGHT INDUSTRIAL	9	834,500	2,077,100	2,911,600	28.66%	71.34%
710C-FEDERAL MDL-94	7	997,700	35,224,900	36,222,600	2.75%	97.25%
710V-FEDERAL VAC	24	2,762,500	158,800	2,921,300	94.56%	5.44%
720C-STATE MDL-94	3	287,500	7,346,100	7,633,600	3.77%	96.23%

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LAND USE	Parcel Count	LAND VALUE	BUILDING VALUE	TOTAL VALUE	PERCENT LAND	PERCENT BUILDING
720R-STATE MDL-01	1	306,800	71,400	378,200	81.12%	18.88%
720V-STATE VAC	13	1,155,300	284,300	1,439,600	80.25%	19.75%
740C-LOCAL MDL-94	53	4,852,700	62,442,200	67,294,900	7.21%	92.79%
740R-LOCAL MDL-01	1	0	111,100	111,100	0.00%	100.00%
740V-LOCAL VAC	108	6,506,800	3,741,300	10,248,100	63.49%	36.51%
750C-COMBINED LOT	5	922,800	8,388,000	9,310,800	9.91%	90.09%
750V-COMBINED LOT	853	2,017,000	3,531,600	5,548,600	36.35%	63.65%
800V-VAC LAND	213	18,472,200	714,400	19,186,600	96.28%	3.72%
810V-VAC LAND POT	1	48,600	11,400	60,000	81.00%	19.00%
820V-VAC LAND UNBLD	46	230,300	456,000	686,300	33.56%	66.44%
822V-LAND - URBAN DEVELOPMENT	10	185,800	0	185,800	100.00%	0.00%
841V-LAND - RURAL DEVELOPMENT	1	691,900	77,700	769,600	89.90%	10.10%
842V-LAND - URBAN INDUSTRIAL	2	321,900	13,200	335,100	96.06%	3.94%
852V-LAND - URBAN COMM	29	4,110,500	1,319,700	5,430,200	75.70%	24.30%
870V-COMBINED LOT MAIN	1	0	0	0	0.00%	0.00%
871V-COMBINED LOT COMM	2	0	0	0	0.00%	0.00%
890V-OTHER	1	0	875,600	875,600	0.00%	100.00%
Totals	6,678	313,715,600	1,259,166,200	1,572,881,800		