



TOWN OF SURRY
OFFICE OF THE SELECTMEN
1 VILLAGE ROAD
SURRY, N.H. 03431
(603) 352-3075

Assessing Services Request for Proposals

The Town of Surry, NH is seeking competitive proposals from qualified individuals or companies, acting singularly or in consortium, to provide General Assessing, Measure and Listing as well as Cyclical Revaluation Services for years 2024 through 2027.

Proposals should be directed to the Selectmen at 1 Village Road Surry, NH 03431 and are due by 7 pm Monday, October 2, 2023 at which time they will be opened and read aloud. Faxed or emailed proposals will not be accepted. Time and effort spent for preparation of any proposal is the responsibility of the proposer.

SPECIFICATIONS

1. Functions, Responsibilities, Term of Contract

The Town of Surry, NH seeks to retain a Professional Assessing Service and sign a contract to perform the duties of and function as Municipal Assessor for the Town for the four-year period from January 1, 2024 to December 31, 2027.

2. Requirement for Proposal

Please note the following items must be included with the proposal:

- Name and contact information of the Professional Assessing Service's authorized representative.
- How many years the Professional Assessing Service has been engaged in the assessing business.
- Explanation of the Professional Assessing Service's ability to provide the services and minimum specifications described below, in accordance with NH law, the Department of Revenue Administration's (DRA) Rev 600 rules and municipal assessment appraisal industry standards.
- Qualifications of the individuals to be assigned to the Town, including certifications and years of experience.
- A list of municipal clients, including number of real estate parcels, and scope of services. Such list must include at least three (3) communities comparable to the Town of Surry in terms of population and parcel count.

3. Scope of Work

The Town of Surry, located within Cheshire County New Hampshire, is 16 square miles with a population of approximately 828. The Town has 541 parcels and 566 cards with the following characteristics:

PROPERTY TYPE	PARCEL COUNT
Residential Land Only	47
Residential Land Only w / Current Use	94
Residential Land & Building (not incl cu)	282
Residential Land & Building w / Current Use	38
Manufactured Housing On Own Land	11
Manufactured Housing On Land of Another	12
Duplex & Multi-Family	12
Commercial / Industrial Land Only	7
Commercial / Industrial Land & Buildings	5
Utility Parcels	3
TOTAL TAXABLE PARCELS	511
TOTAL EXEMPT / NON-TAXABLE	30
(TOTAL NUMBER OF CARDS)	566
TOTAL NUMBER OF PARCELS	541
Properties with view (included above)	59
Properties with water frontage (included above)	25
Campground sites (included above)	17

Utility appraisal will be included with the General Assessing Request for Proposals. The Town uses digitized tax maps and contracts this service with Terra Maps in Chichester, NH. The Town uses Avitar Assessing and Avitar Tax Collect software. A copy of the most recent MS-1 is attached. Exemptions, Credits and Current Use were recertified for 2022. The most recent cyclical revaluation was completed in 2022. The most recent measure and list cycle of approximately one-quarter (1/4) of the properties each year was completed in 2021. The Town averages approximately 20 total transfers, 2 abatements and 2 land use change tax requests per year. Surry bills its taxes twice yearly, so general assessing values as of April 1 except for utilities are due May 1, and all materials, values and information needed for the MS-1 is due no later than August 1 each year.

The Town endeavors to find a Professional Assessing Service who will work closely with the Town to perform assessing services as needed. Interested contractors are invited to submit proposals that shall include, at a minimum, the following services.

The SCOPE OF WORK is broken into three subparts: General Assessing Services, Measure and Listing, and Cyclical Revaluation. Proposals must include sections that address each separately.

Part 1 GENERAL ASSESSING SERVICES

- Pick-ups: Perform the careful measuring, listing, and valuation of any new or newly modified properties represented by the issuance of permits (building, demolition, driveway, etc.) or any other applicable source.
- Visit campground to set values for taxable recreational vehicles and features at 17 sites.
- Map changes: Reassess and generate new values for any new parcels created from subdivisions, developments, or lot line changes/mergers which have occurred prior to April 1 of each tax year.
- Review all requests for abatements and develop a recommendation to the Select Board for approval or denial.
- Establish value for Land Use Change Tax (LUCT) and all other statutory assessing obligations.
- Prepare any necessary utility property valuation updates.
- Act as the assessing agent for the Town of Surry in abatement appeals, including formal appeals to the BTLA or Superior Court, representing the Town and its best interest.
- Meet and work with DRA monitors to ensure the Town of Surry is satisfying all State and NH certification requirements and to maintain a positive and responsive working relationship.
- Perform annual assessment to sales ratio studies for the purpose of completing the annual equalization process. Investigate countable sales whose sale price notably varies from assessed value.
- Enter data as of April 1 into Avitar software during the course of regular duties due by May 1.

Part 2 MEASURE AND LISTING

- Measure and List and enter changes for approximately one-quarter (1/4) of all taxable and tax- exempt properties including current use properties each year for four (4) years of the Contract so that all properties have been inspected and field verified at least once within the four-year cycle, including pick-ups.
- Enter data into Avitar software as needed during the course of regular duties.

Part 3 CYCLICAL REVALUATION SERVICES

- Perform Sales Verification.
- Perform sales analysis.
- Develop Unit Costs tables.
- Test New Cost tables
- Recalculation of all values.
- Perform comprehensive final field review of new values.

- Prepare report of preliminary values to be available for taxpayer's reference in the year of the statistical update/revaluation.
- Prepare and mail a letter to each property owner regarding the new value for their property that explains the contributing factors related to the new value.
- Perform informal reviews/hearings for residents who want to discuss their new value with the assessor.
- Review after hearings.
- Enter data into Avitar software.
- Final Sales Analysis and New Values.
- Write the USPAP Standard 6 Compliant Final Appraisal Report for 2027.

4. Termination / Resignation

The Town of Surry reserves the right to terminate the contract with the selected Professional Assessing Service at any time, by giving written notice to the Professional Assessing Service of such termination and specifying the effective date thereof, at least thirty (30) days before the effective date of such termination. In that event, all finished and unfinished work products shall become the property of the Town of Surry. If the contract is terminated by the Town, as provided herein, the Professional Assessing Service will be paid an amount which reflects the same ratio to the total compensation as the services performed reflect to the total services covered by the contract, less payment of compensation previously made.

The Town reserves the right to have any contracted assessor assigned to the Town of Surry removed from the assignment and require a new person be assigned, should the Town have concerns with the person's performance, demeanor, or working relationship with any Town employee, official, or member of the public. Prior to any removal of the contracted assessor the Town will attempt to work with the contractor to resolve the concerns.

If any assessor assigned to the Town of Surry is convicted of a crime that would create mistrust in the assessor or their ability to perform their duties for the Town, the Town of Surry shall, without prior notice, immediately terminate the assessing service contract without any further obligation for payment.

5. Services / Accommodations By The Town

The Town of Surry will furnish information pertaining to ownership of all property in the Town, including tax maps, charts, plans, and sales information, as is needed to perform the revaluation and general assessing services.

The Town will be responsible for passing the assessment data into the tax billing system and completing the MS-1. The Town performs monthly ownership updates into Avitar as reflected

on recorded deeds from which will arise any needed exemption review and, along with issued building permits, the need for all land use change tax assessments. The Town will annually contact the campground for the list of taxable campers, and owners of all exempt charitable properties, for required paperwork.

The Town will inform the contracted assessor of all sales of property and any lot subdivision, merger or lot line adjustment taking place.

The Professional Assessing Service agrees to provide all services, support, personnel, labor, personal materials and equipment to perform the services that are subject of RFP. The Professional Assessing Service shall provide all the above stated resources. Personal materials include calculators and field inspection equipment. All work will be in compliance with the State of New Hampshire Department of Revenue Administration Administrative Rules governing assessing and any relevant applicable rules and standards adopted by the Assessing Standards Board.

The Town of Surry shall provide access to Avitar Assessing for the agents and employees of the Professional Assessing Service in the execution of the Contract.

6. Transfer, Assignment, Subletting

The Professional Assessing Service may not assign any part of this Contract without express written permission by the Town.

All work products used or created in conjunction with the services covered under this Contract shall be the sole property of the Town of Surry, and that, in the event of cancellation or termination, such products will remain with the Town of Surry.

7. Commencement and Completion of Contract

The contract shall begin on January 1, 2024, with the execution of a Contract between the selected Professional Assessing Service and the Town.

The Professional Assessing Service shall provide to the Town of Surry, upon completion of this Contract or as may be required during the performance thereof all records, reports, maps, and supporting documentation produced in performance of the Contract.

8. Insurance / Indemnification

The Professional Assessing Service agrees to indemnify, defend, and hold harmless the Town of Surry and its employed and elected officials against all claims including but not limited to claims for bodily injury, death and property damage, which are caused by the Professional Assessing

Service's actions or failure to act in the course of the Professional Assessing Service's performance of all services under this Contract.

The Professional Assessing Service shall maintain the following insurances throughout the Contract term:

- A. Worker's Compensation Insurance
- B. Business Liability Insurance
- C. Automobile Liability Insurance
- D. Errors and Omissions Liability

The Professional Assessing Service shall file preliminary certificates with the proposal submission showing that the above insurance has been purchased. The adequacy of protection shall be subject to the approval of the Board of Selectmen. The provisions listed within this RFP shall also be included in a Contract for service prepared by the successful bidder.

9. Reserves

The Town of Surry reserves the right to reject any or all proposals, to award proposals in whole or in part, deemed to be in the best interest of the Town, regardless of the lowest bid amount. Financial obligation is a strong consideration of the Board in the current economic climate. The Town of Surry reserves the right to request additional data or information or a presentation in support of written proposals received.

However, the Town may award a contract based on the offers received, without additional submissions. The proposal should be submitted on the most favorable terms, from all aspects, which the proposer can submit.

After the bid opening, the bidder may not amend, correct, modify, or change in any fashion a bid which would be contradictory to the interests of the Town of Surry or fair competition. The Board of Selectmen may waive minor informalities, or allow the bidder to make corrections, as long as the intent of the bid is not disturbed.

All bids shall detail the specific cost of services, payment schedule, and any extra service not deemed part of the contract and their specific / itemized cost.

To be determined responsible, a prospective contractor must:

- a) have adequate financial resources and insurance requirements to perform the contract, or the ability to obtain them;
- b) be able to comply with the required or proposed delivery or performance schedules;
- c) have a satisfactory performance record;

- d) have a proven record of integrity and business ethics;
- e) have the necessary organization, experience, technical skills, and support staff, or the ability to obtain them.

In the fall of 2026, the Town of Surry will enter into a separate contract for the cyclical revaluation due in 2027 based on the response to this Request for Proposals.

The following clauses shall be part of every bid specification package. A bidder must sign this statement in order for the bid to be valid.

"The undersigned certifies under penalties of perjury that this bid is in all respects bona fide, fair and made without collusion or fraud with any other person. As used in this section, the word "person" means any natural person, joint venture, partnership, corporation or other business or legal entity."

"The undersigned certifies under penalties of perjury that this bid is offered with full understanding of the project as proposed in accord with the Scope of Work / Contract Requirements."

FIRM: _____

SIGNATURE _____

NAME (PRINT) _____

TITLE: _____

ADDRESS: _____

TELEPHONE: _____

DATE: _____

EMAIL: _____