



General & Cyclical Assessing Services (2025 DRA Certification) Request for Proposals

The Town of Effingham NH is currently seeking competitive proposals from qualified individuals or companies, acting singularly or in consortium, to provide a NH Department of Revenue (DRA) certification for year 2025, General Assessing Services as well as Cyclical Revaluation Services for years 2026 through 2029.

Four (4) copies of sealed proposals are due **by Thursday, July 25, 2024, by 2:00 pm**. Proposals should be directed to the attention of Town Administrator, Caitlyn Pitts at 68 School street Effingham, NH 03882. Faxed or emailed proposals will not be accepted. Time and effort spent for preparation of any proposal is the responsibility of the proposer.

Questions about this RFP and Bid Specifications should be directed to the Town Administrator, Caitlyn Pitts at admin@effinghamnh.net.

SPECIFICATIONS

Section One: Functions and Responsibilities

The Town of Effingham, New Hampshire seeks to retain a Professional Assessing Service to perform the duties and function of Municipal Assessor for the Town of Effingham for a DRA certification of all properties in town for year 2025, General Assessing Services 2025 through 2029 and four-year Cyclical Revaluation Services for 2026 through 2029.

Section Two: Term of Contract

The Town envisions entering into a Five (5) year contract with the selected Professional Assessing Service under this RFP. The term of the contract shall be for a period from January 1, 2025, to – December 31, 2029. **Year 2025 is to be the DRA certification.**

Section Three: 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.
- Explanation as to how many years the Professional Assessing Service has been engaged in the assessing business.

- Explanation as to the Professional Assessing Service’s ability to provide the services and minimum specifications described below, in accordance with NH law, the NH Department of Revenue Administration’s (DRA) Rev 600 rules and municipal assessment appraisal industry standards.
- Qualifications of the individuals that would 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 Effingham in terms of population and parcel count.

Section Four: Scope of Work

The Town of Effingham, located within Carroll County New Hampshire, is 38.9 square miles with a population of approximately 1,673. The Town has 1,757 parcels with the following classifications:

PROPERTY TYPE	PARCEL COUNT
Residential Land Only	321
Residential Land Only w/Current Use	194
Residential Building & Land	681
Residential Building & Land w/Current Use	90
Residential Manufactured on Own Land	105
Residential Manufactured on Rented Land	234
Residential Apartment	
Commercial / Industrial Land Only	17
Commercial / Industrial Land & Buildings	18
Commercial / Industrial w/ Current Use	3
Utility Parcels	2
Properties with views (included above)	111
TOTAL TAXABLE PARCELS	1692
TOTAL EXEMPT / NON-TAXABLE	65
TOTAL NUMBER OF CARDS	1908
TOTAL NUMBER OF PARCELS	1757

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: DRA Valuation Update Services, General Assessing Services, and Cyclical Revaluation Services. **Proposals must include sections that address each separately.**

PART 1 – VALUATION UPDATE SERVICES (See Section 6):

The selected Professional Assessing Service shall perform the following DRA Certification services for year 2025 of all properties in Effingham to ensure compliance as follows:

- Perform sales verification and analysis.
- Develop of New Costs Tables (Land & Buildings).
- Testing of New Costs Tables.
- Recalculation of All Values.
- Parcel by Parcel Field Review.
- Notice of New Values.
- Preliminary values posted on the website (for at least 30 days after notice of new values are mailed).
- Informal Hearings.
- Review after Hearings.
- All Data Processing.
- Final Sales Analysis and New Values.
- Printing of Final Cards.
- USPAP Standard 6 Compliant Final Appraisal Report
- Written Responses to the Board of Selectmen on all abatement requests for Tax Year 2025.
- Utility values included based on the new HB700 method.
- Based on approximately 1,882 records (parcels plus multi cards).

PART 2 - GENERAL ASSESSING SERVICES (See Section 6):

The selected Professional Assessing Service shall perform the following general assessing services for each year of the contract (Typical yearly permit amounts are 115 to 125):

- Pick-ups: Perform the careful measuring, listing, and valuation of any new or newly modified properties represented by the issuance of permits (building, trade, demolition, driveway, etc.) or any other applicable source.
- Perform routine assessment updates resulting from changes due to new construction, additions, renovations, damage, total loss, or other unforeseen circumstances.
- Perform field inspections on all properties that change ownership and verify the circumstances surrounding all sales as required by the NH Department of Revenue Administration. (Accepting simple change of name transfers including, but not limited to, transfer/formation of a “Trust” where no funds are involved). See Avitar Contract section 1.k for door hanger
- 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 abatement and develop a recommendation to the Select Board for approval or denial.
- Review applications for current use 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.
- Review of all taxable utility property information including Timber/Excavation yield taxes.
- Photograph properties upon each new review and for all properties every five years. These photos must be readily uploaded to the Avitar Assessing software.
- Communicate with residents wishing to discuss the valuation of their properties.
- Communicate with Town Administration and Board of Selectmen upon request.
- Act as the assessing agent for the Town of Effingham in abatement appeals, including formal appeals to the BTLA or Superior Courts, representing the Town and its best interest.
- Meet and work with the DRA monitors to ensure the Town of Effingham is satisfying all State of NH certification requirements and to maintain a positive and responsive working relationship.

- Perform annual assessment to sales ratio studies for the purpose of informing Town Administration of the need for a full revaluation, partial revaluation, or statistical update to be compliant with RSA 75:8-Revised Inventory.
- Demonstrate ability to adhere to applicable NH statutes, Department of Revenue 600 Rules, Assessment Standards Board Guidelines, and the Uniform Standards of Professional Appraisal Practices.
- Schedule time, as needed, at the Town Administration office to be available in person for residents to sit and meet with the Town's contracted assessor. On Average 1 day a month.
- At least one assessor shall be assigned to Effingham to ensure continuity.

PART 3 - CYCLICAL REVALUATION SERVICES (See Section 6):

The Town seeks a Professional Assessing Service that will perform reviews of assessing data for 20% of Town:

- Cyclical review of all taxable and tax-exempt properties, including review of current use properties.
- Measure and list, photograph, and enter changes for approximately 20% of the 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.
- Perform call backs for all properties not having the benefit of an interior inspection upon the first visit to the property.
- Enter data into Avitar software as needed during the course of regular duties.

Section Five: TERMINATION / RESIGNATION

The Town of Effingham 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 Effingham. 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 reflects 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 Effingham 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 concerns.

If any assessor assigned to the Town of Effingham 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 Effingham shall, without prior notice, immediately terminate the assessing service contract without any further obligation for payment.

Section Six: SERVICES / ACCOMODATIONS BY THE TOWN

The Town of Effingham 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.
- Be responsible for passing the assessment data into the tax billing system. The Town also performs monthly ownership updates into Avitar as reflected on registered deeds.
- Inform the contracted assessor of all sales of property and any lot subdivision, merger or lot line adjustment taking place.
- Respond to taxpayer requests for applications for exemptions, current use or abatements.
- Assist property owners interpret assessment facts as contained in their property cards. Forward any questions to or advise the assessor of all said questions/requests or schedule an appointment for the assessor's next visit.
- Aid the assessor with secretarial duties which may include typing, data entry, record keeping and appointment scheduling.
- Be responsible for the cost of mailings and /or notices or publication not previously assigned.
- If a clerk/employee is not available to assist in the above duties the Professional Assessing Service shall fulfill these obligations until one is made available at a mutually agreeable hourly rate and support.
- Shall provide office space and access to a workstation (phone, calculator, general office equipment) for the agents and employees of the Professional Assessing Service in the execution of this Contract. All Town of Effingham Computer Use Policies are to be observed by any person working within the Town Offices.

The Professional Assessing Service:

- Agrees to provide all services, support, personnel, labor, personal materials and equipment to perform the services that are subject of this RFP.

Section Seven: 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 Effingham, and that, in the event of cancellation or termination, such products will remain with the Town of Effingham.

Section Eight: COMMENCEMENT AND COMPLETION OF CONTRACT

The Contract shall begin on January 1, 2025, upon acceptance of the Board of Selectmen 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 Effingham, 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.

Section Nine: INSURANCE / INDEMNIFICATION

The Professional Assessing Service agrees to indemnify, defend, and hold harmless the Town of Effingham 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 public liability insurance, automobile liability insurance and workmen's compensation insurance unless Contractor is not required to do so by New Hampshire state law or as otherwise agreed upon.

The minimum public liability insurance shall be in the form of commercial general liability with the inclusion of contractual liability coverage as follows; Comprehensive General Liability: \$1,000,000 each occurrence, \$2,000,000 aggregate coverage; Automobile Liability: \$1,000,000 combined single limit, \$500,000 Bodily Injury/Person Workers Compensation to comply with NH Statutory Limits.

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 successful bidder shall prepare a Contract for service that shall also include the provisions listed within this RFP, which shall become a part of the Contract.

Section Ten: RESERVES

The Town of Effingham 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 Effingham 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 Effingham 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 out the specific cost of services, payment schedule, and any extra services 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;

The following non-collusion clause 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.”

FIRM: _____

TELEPHONE:

SIGNATURE _____

NAME(PRINT) _____

DATE:

TITLE: _____

EMAIL:

ADDRESS: _____
