

Town of Johnson
Town Administrator's Report
For June 3rd, 2024

1. Consider additions or adjustments and approving agenda
2. Review invoices and orders
3. Public Comment
4. Selectboard issues and concerns

5. Planned Purchases
 - a. Grow Cemetery Fence
 - i. Decision, I'm requesting the board authorize Jason to purchase the fencing materials for Grow Cemetery under this FY24's budget. The fence will be installed in FY25. The suggested motion is "Move to authorize Jason Whitehill to purchase the fencing materials for Grow Cemetery, not to exceed \$7,500."

6. Tuesday Night Live
 - a. Information, Howard Romero will give an update to the board on Tuesday Night Live

7. Bread Oven Committee
 - a. Information, Jasmine Yuris will give an update to the board on the Bread Oven Committee
 - b. Future Report
 - i. Decision, the board will need to decide on the next committee to give a report.

8. Scribner Bridge Alternatives
 - a. Information, VHB will provide a final presentation for Scribner Bridge. This was a scoping study to come up with alternatives to the existing pinch point. The intent was to preserve historic structure while protecting the adjacent public infrastructure. VHB will be displaying on the big screen and there are no items for the packet at this time.

9. Website
 - a. Discussion, possible action, the town has been throwing around the idea of revamping our website. Recently TNL has requested a page on the website to advertise their events. I believe the board should approach this with the main question in mind: Do you want to pursue a new website? If yes, we should walk away from this meeting with delegations and a timeline. In the short term, will the board allow TNL a page on the town website to allow advertising its summer program and possibly accepting donations.

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10. Hazard Mitigation Grant Program

- a. Information, possible decision, this discussion will come out of the regional meeting that is happening Thursday 6/13/24. I will provide an updated list of countywide projects that came out of this meeting for Monday. LCPC has also requested that the Board create a list of any additional potential projects that they would like to be considered. Lastly, there has been a request for an "elevation" in Johnson. This will use this grant to pay to elevate a private residence. This will have administrative requirements required by the Town. There may also be some financial implications where the Town may have to hold over expenses until FEMA reimburses this project. I recommend discussing but putting this on the 7/1 agenda for a decision after I have received all the information.

11. Purchasing Policy

- a. Discussion, possible decision, the new purchasing policy is ready for review and possible adoption with changes made during the meeting. Some major changes include a purchase order system, two signatures for po's, increased thresholds without board approval, and possible others. Susan Lovering has requested a means for committee volunteers to have some purchasing power, I believe with the PO two signature system this will be possible while providing protection against fraud and increased efficiency. I believe the topics to be discussed will be thresholds for spending and requirements, Town Administrator's review of finances prior to warrants being delivered to the board, and a discussion on how to make purchasing easier for volunteers.

12. Rec Director Job Description

- a. Information, Shayne Spence led a great community meeting on Wednesday. I believe more time will be needed to craft this position. He will give an update to the board. Shayne will be investigating a collaborative effort with nearby towns as well as holding additional community meetings.

13. 10-hour Workday

- a. Discussion, possible decision, the highway department would like the board to consider a 10-hour workday during the summer months. This is standard with other towns. Considerations of the board will be how to handle on-call during the summer months. There is no provision for on-call pay during the summer months at this time. I do not believe there should be, and this should fall under the responsibility of the Road Foreman. Any alterations would need to be agreed upon at the union level. It might be pertinent to assign temporary on-call to the Road Commissioner or the Selectboard delegate.

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14. RFP for Town Wide Reappraisal
 - a. Decision, Justin Mason has prepared a draft RFP for the Townwide Reappraisal. The Town needs to get this out ASAP. At this point we are looking at a 4-5 wait period for an appraisal in Johnson.

15. Revolving Loan Fund
 - a. Information, Duncan and Randall have done a lot of research in the last few weeks and Duncan will be giving the board a brief update.

16. Executive Session for Employment Evaluation 1 V.S.A. § 313(a)(3)
 - a. No expected action of the board.

17. Executive Session for pending or probable civil litigation or a prosecution, to which the public body is or may be a party; 1 V.S.A. § 313(a)(1)(E)
 - a. Action expected, decision.

18. Executive Session for confidential attorney-client communications made for the purpose of providing professional legal services to the body; 1 V.S.A. § 313(a)(1)(F)
 - a. Information, possible action or decision.

Procurement Policy

Town of Johnson, Vermont

SECTION 1 PURPOSE:

The purpose of this Purchasing Policy is to obtain the highest quality goods and services for the Town of Johnson at the lowest possible price, to exercise financial control over the purchasing process, to clearly define authority for the purchasing function, to allow fair and equal opportunity among qualified suppliers, to provide an accountability and protection for those individuals charged with the responsibility to make purchasing decisions, and to provide for increased public confidence in the procedures followed in public purchasing.

SECTION 2 AFFIRMATIVE ACTION AND LOCAL PREFERENCE:

Whenever possible, qualified small, minority and women-owned businesses shall be included in the solicitation lists for bids or non-bid purchases. If the purchase is federally funded in whole or in part, minority and women owned businesses must be included in the solicitation lists and all other affirmative action requirements outlined in the grant provisions must be followed. The Town may exercise a preference for local businesses for purchases funded exclusively by the Town but only if such a preference does not result in unreasonable prices or rates due to a lack of competition. For purchases funded in whole or in part with federal funding the Town may not exercise a preference for local businesses.

SECTION 3 CODE OF CONDUCT:

Employees, officers, and agents of the Town who are involved in the procurement and selection of bids and purchases shall make reasonable efforts to avoid real, apparent, or potential conflicts of interest. No employee, officer or agent of the Town shall participate in selection, award, or administration of a contract if a conflict of interest, real or apparent, would be involved. Such a conflict would arise when:

- the employee, officer, or agent,
- any member of his or her immediate family,
- his or her partner, or
- an organization which employs, or is about to employ, any of the above, has a financial or personal interest in the firm/vendor selected for award.

An employee, officer or agent of the Town who is involved in the procurement and selection of a bid or purchase and who has a real or apparent conflict of interest must disclose that conflict of interest within the context of a duly warned Selectboard meeting that occurs before the bid selection or purchase takes place. Such disclosure must be documented in the minutes for that meeting which shall be retained as part of the official record surrounding the bid or purchase.

Officers, employees and agents of the Town will not solicit nor accept gratuities, favors or anything of monetary value from contractors, potential contractors, or parties to sub - agreements.

Officers, employees and agents who fail to follow the above Code of Conduct shall be sanctioned or disciplined, to the extent permitted by law, for violations of the above standards.

SECTION 4 DOCUMENTATION:

Records documenting the procurement process for any Minor or Major purchases, as those terms are defined below, including the reason for the specific procurement method chosen, the basis for the award and contract pricing (showing evidence that the process was fair and equitable), as well as any other significant decisions that were part of the procurement process shall be maintained for a period of at least three years from the date of the submission to the Federal government of the final expenditure report if the purchase or project was funded with federal grants, or until the completion of any litigation, claim, negotiation, audit, or other action involving the records, whichever is longer. Otherwise, records shall be maintained by the Town in accordance with the retention and disposition schedules as set by the Vermont State Archivist.

SECTION 5 PURCHASING AUTHORITY:

a. Purchasing Agents.

The following employees are designated to act as Purchasing Agents for the Town:

Town Administrator
Public Works Supervisor
Recreation Coordinator
Town Clerk
Library Director

Purchasing Agents are responsible for ensuring that the best possible price, quality, and timeliness are obtained with each purchase and Purchasing Agents shall review all proposed procurements to avoid unnecessary or duplicative purchases of equipment, supplies and services. Purchasing Agents shall also ensure that competition is not restricted with limits on the geographic location of vendors, with unreasonable requirements or qualifications placed on vendors, or by allowing vendors to be selected who have engaged in noncompetitive pricing practices.

b. Incidental Purchases.

Employees who have been designated to act as Purchasing Agents may make or approve purchases of up to \$500 without prior selectboard approval and without the use of a purchase order, provided those purchases are limited to the amount of the budget authorized by the Town.

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c. Minor Purchases.

Employees who have been designated to act as Purchasing Agents may make purchases with a value between \$501 and \$3,000 only with the use of a completed purchase order as defined below.

d. Major Purchases.

Employees who have been designated to act as Purchasing Agents may make purchases with a value between \$3,001 and \$15,000 only with the prior approval of the Selectboard and are limited to the amount of the budget authorized by the Town. Although not required, competitive quotes from at least two vendors should be obtained whenever possible.

e. Bid Required Purchases.

All purchases over \$15,000 require prior approval of the Selectboard. The Selectboard shall review all proposed procurements to avoid unnecessary or duplicative purchases of equipment, supplies and services. The Selectboard shall also ensure that competition is not restricted with limits on the geographic location of vendors, with unreasonable requirements or qualifications placed on vendors or bidders, or by allowing vendors to be selected who have engaged in noncompetitive pricing practices.

If federal funding is used for purchases between \$15,000 (\$2,000 in the case of construction projects subject to Davis Bacon requirements) and \$250,000, price or rate quotes must be obtained from two or more qualified sources following the affirmative action provision of this policy and all provisions regarding fair and unrestricted competition.

Bid Required purchases with a value of \$15,000 or more must follow a sealed bid process as outlined below.

Purchases at or exceeding \$250,000 or construction projects of any value that are funded with federal dollars must follow a sealed bid process as outlined below and also follow any procurement guidance as outlined in the grant agreement. In addition, a pricing analysis must be completed by the purchasing agent or a qualified consultant prior to issuing the request for proposal to ensure that there is a reasonable estimate against which to compare bid proposal pricing.

SECTION 6a PURCHASE ORDER PROCESS:

1. OFFICIAL PURCHASE ORDER (P.O.) FORM

The Town Treasurer shall maintain a supply of P.O. forms to be utilized by all town departments. Department Heads are responsible for the proper administration and adherence to this policy.

2. PURCHASE ORDER PROCEDURE

P.O.s are to be completed by Department Heads and shall be approved **PRIOR TO**:

1. Ordering supplies, equipment or services, or,
2. Payment of invoices in the case of a recognized emergency situation, and
3. Exceeding the budgeted line item expense amount.

Step One - Submission of P.O. for Approval

Items to be included on P.O. are identified in **3**. All P.O.'s must be submitted by the Department Head and approved by the below authorities:

\$0 – 500.99	=	No P.O. Required
\$501-\$3000.99	=	Town Treasurer or Town Administrator
\$3001 and greater	=	Selectboard

NOTE: Purchases under \$500.99 shall not be broken down into multiple invoices in order to avoid the requirement to secure a purchase order.

Step Two - Submission of P.O. with Invoice to Town Treasurer

After approval, the P.O. is given to the Town Treasurer and the pertinent information is entered into the database (NEMRC Accounts Payable) to encumber the projected expense. The first copy of the P.O. is filed by the Town Treasurer for reference when processing invoices.

The Town Treasurer gives the second copy to the appropriate Department Head for retention and the Department Head attaches a copy of the P.O. to pertinent invoices.

Once the purchase order has been expended the first copy is filed in front of the invoice and included the warrant and filed for the current fiscal year.

Step Three - Submission of Invoice to Selectboard for Payment

The Town Treasurer will submit all invoices with required P.O.s and a warrant to the Selectboard for review. **Invoices without the required P.O. will not be processed for payment by the Town Treasurer and the P.O. will be returned to the Department Head.** The Board will review and sign off on the warrant for payment of all invoices.

3. CHECKLIST

Vendor name	Description of bid process utilized
Ship to: Department Head name & date	Over budget amount & code to pay for it
Department	Total of P.O.
Funding Source: Budget line item	Authorized signature
Project name	Treasurer or Administrators signature
Quantity	
Description of product/service	

SECTION 6b SEALED BID PROCESS:

The sealed bid process shall be initiated by the issuance of a Request for Bids prepared by the Selectboard or its designee. Notice of the Request for Bids shall be made by letters to known providers soliciting bid responses, advertisements posted in three public locations within the Town, and advertisements placed in a newspaper of general circulation in the region.

a. B-1D SPECIFICATIONS.

A list of bid specifications shall be prepared for each purchase over \$10,000 and shall be available for inspection at the Town office. Bid specifications shall include:

Bid name.

Bid submission deadline.

Date, location, and time of bid opening.

Specifications for the project or services including quantity, design, and performance features.

Bond and/or insurance requirements.

A copy of the proposed contract.

Any special requirements unique to the project or purchase.

Delivery or completion date.

For construction projects in excess of \$500,000, language that sets a requirement for a bid guarantee in the amount of 5% of the bid price from all bidders, as well as performance and payment bonds in the amount of 100% of the contract price from the contractor awarded the bid. If federally grant funded, the bidders must also include costs for Davis Bacon compliance if that is a requirement of the federal agency providing the funding.

For construction projects over \$2,000, a statement that contractors will be provided with a copy of the most current wage determination (from the DOL website at <http://www.wdol.gov/dba.aspx>) and must comply with the Davis Bacon Act.

Language that reserves for the Selectboard the right at its sole discretion to reject any and all bids, wholly or in part, to waive any informalities or any irregularities therein, to accept any bid even though it may not be the lowest bid, to call for rebids, to negotiate with any bidder, and to make an award which in its sole and absolute judgment will best serve the Town's interest. The Selectboard reserves the right to investigate the financial condition of any bidder to determine his or her ability to assure service throughout the term of the contract.

Once a Request for Bids has been issued, the bid specifications will be available for inspection at the Town office.

b. BID SUBMISSION.

All bids must be submitted in sealed envelopes, addressed to the Town in care of the Selectboard, and plainly marked with the name of the bid and the time of the bid opening. Bid proposals will be date stamped on the outside of the envelope immediately upon receipt. Any bid may be withdrawn in writing prior to the scheduled time for the opening of bids. Any bids received after the time and date specified shall not be considered and shall be returned to the bidder unopened.

Bidders shall bid to specifications and any exceptions must be noted by the bidder. A bidder submitting a bid thereby certifies that the bid is made in good faith without fraud, collusion, or connection of any kind with any other bidder for the same work, and that the bidder is competing solely on his/her behalf without connection with or obligation to any undisclosed person or firm.

c. BID OPENING.

Every bid received prior to the bid submission deadline will be publicly opened and read aloud by the Selectboard. The bid opening will include the name and address of bidder; for lump sum contracts, the lump sum base bid, and the bid for each alternate; for unit price contracts, the unit price for each item and the total, if stated; and the nature and the amount of security furnished with the bid if required.

d. CRITERIA FOR BID SELECTION.

In evaluating bids, the Selectboard will consider the following criteria:

- Price.
 - Bidder's ability to perform within the specified time limits.
 - Bidder's experience and reputation, including past performance for the Town.
 - Quality of the materials and services specified in the bid.
 - Bidder's ability to meet other terms and conditions, including insurance and bond requirements.
 - Bidder's financial responsibility.
 - Bidder's availability to provide future service, maintenance, and support.
 - Nature and size of bidder.
 - Local, minority, and women-owned businesses may be granted preference. Such preference may not exceed 15% of the lowest bid.
 - Contract provisions that are acceptable to the Town.
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- For construction projects over \$2,000, contractor's indication of acceptance of wages in the current wage determination provided as part of the Request for Bids.
 - Any other factors that the Selectboard determines are relevant and appropriate in connection with a given project or service.

In addition to the above, in the case of a contract supported by federal funds, the additional criteria shall apply:

There shall be no preference exercised for local contractors or suppliers.

Minority and women-owned businesses must be included in the solicitation list for the request for proposal.

13. The Selectboard will not select a bidder who is listed on the Excluded Parties List System website (<https://www.sam.gov>).

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e. CHANGE ORDERS.

If specification changes are made prior to the close of the bid process, the Request for Bids will be amended and notice shall be sent to any bidder who already submitted a bid and a new bid process will be initiated. Once a bid has been accepted, if changes to the specifications become necessary, the Selectboard will prepare a change order specifying the scope of the change. Once approved, the contractor and an authorized agent of the Town must sign the change order.

f. EXCEPTIONS.

The following exceptions may apply, however there must be written documentation created and maintained that outlines the process and rationale for such exceptions:

i. Competitive Proposals.

If time does not permit the use of sealed bids, or the award will be made on the basis of non-price related factors, a competitive proposal process shall be initiated by the issuance of a Request for Bids (RFB) or Request for Qualifications (RFQ) prepared by the Selectboard or its designee that includes the factors that will be used to evaluate and compare the proposals. Bids or qualifications shall be obtained from an adequate number of qualified sources (at least two vendors) to ensure that the Town has received a fair and reasonable price and all notification and record keeping requirements of the sealed bid process shall be followed. If architectural or engineering services are being solicited, this process should be used with the most qualified firm or individual awarded the bid and price or fees negotiated after the award. If competitive proposals are used, all of the above steps in the sealed bid process should be followed except that: 1) the bid submission need not be sealed; and 2) price will not be the primary factor in the proposal selection.

ii. Sole Source Purchases.

If the Selectboard determines that there is only one possible source for a proposed purchase, it may waive the bid process and authorize the purchase from the sole source.

111. Recurring Purchases.

If the total value of a recurring purchase of a good or service is anticipated to exceed \$50,000 during any fiscal year, the bid process shall be utilized and shall specify the recurring nature of the purchase. Once a bid has been accepted, all future purchases shall be made from that bidder without necessity of additional bids, until such time as the Selectboard votes to initiate a new bid process.

iv. Emergency Purchases.

The Selectboard may award contracts and make purchases for the purpose of meeting the public emergency without complying with the bid process. Emergency expenditures may include immediate repair or maintenance of town property, vehicles, or equipment if the delay in such repair or maintenance would endanger persons or property or result in substantial impairment of the delivery of important Town services.

v. Professional Services.

The bid process shall not apply to the selection of providers for services that are characterized by a high degree of professional judgment and discretion including legal, financial, auditing, risk management, and insurance services.

Federally funded non-competitive purchases for \$250,000 or more require a cost analysis to determine the reasonableness of the proposed pricing and should be completed in accordance with the requirements of the federal or state agency issuing the grant funding.

The foregoing Policy is hereby adopted by the Selectboard of the Town of Johnson, Vermont, this 7th day of September 2021 and is effective as of this date until amended or repealed.

SIGNATURES.

Eben Patch, Selectboard Chair

Date

Duncan Hastings, Selectboard Vice Chair

Date

Shayne Spence, Selectboard

Date

Mark Woodward, Selectboard

Date

Michael Dunham, Selectboard

Date

Procurement Policy

Town of Johnson, Vermont

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- an organization which employs, or is about to employ, any of the above, has a financial or personal interest in the firm/vendor selected for award.

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b. Incidental Purchases.

Employees who have been designated to act as Purchasing Agents may make or approve purchases of up to \$1000 without prior selectboard approval, provided those purchases are limited to the amount of the budget authorized by the Town.

c. Minor Purchases.

Employees who have been designated to act as Purchasing Agents may make purchases with a value between \$3001 and \$5,000 only with prior approval of the Selectboard and are limited to the amount of the budget authorized by the Town. Although not required, competitive quotes from at least two vendors should be obtained whenever possible.

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All purchases over \$5,000 require prior approval of the Selectboard. The Selectboard shall review all proposed procurements to avoid unnecessary or duplicative purchases of equipment, supplies and services. The Selectboard shall also ensure that competition is not restricted with limits on the geographic location of vendors, with unreasonable requirements or qualifications placed on vendors or bidders, or by allowing vendors to be selected who have engaged in noncompetitive pricing practices.

If federal funding is used for purchases between \$10,000 (\$2,000 in the case of construction projects subject to Davis Bacon requirements) and \$250,000, price or rate quotes must be obtained from two or more qualified sources following the affirmative action provision of this policy and all provisions regarding fair and unrestricted competition.

For all major purchases with a value between \$5,000 and \$10,000, price and rate quotations shall be obtained from at least two qualified vendors to ensure that the Town has received a fair and reasonable price. Vendors will be selected based on cost, the quality of the goods and services offered, and the ability, capacity, and skill of the vendor demonstrated under prior contracts with the Town.

Large purchases with a value of \$10,000 or more must follow a sealed bid process as outlined below.

Purchases at or exceeding \$250,000 or construction projects of any value that are funded with federal dollars must follow a sealed bid process as outlined below and also follow any procurement guidance as outlined in the grant agreement. In addition, a pricing analysis must be completed by the purchasing agent or a qualified consultant prior to issuing the request for proposal to ensure that there is a reasonable estimate against which to compare bid proposal pricing.

SECTION 6 SEALED BID PROCESS:

The sealed bid process shall be initiated by the issuance of a Request for Bids prepared by the Selectboard or its designee. Notice of the Request for Bids shall be made by letters to known providers soliciting bid responses, advertisements posted in three public locations within the Town, and advertisements placed in a newspaper of general circulation in the region.

a. B-1D SPECIFICATIONS.

A list of bid specifications shall be prepared for each purchase over \$10,000 and shall be available for inspection at the Town office. Bid specifications shall include:

Bid name.

Bid submission deadline.

Date, location, and time of bid opening.

Specifications for the project or services including quantity, design, and performance features.

Bond and/or insurance requirements.

A copy of the proposed contract.

Any special requirements unique to the project or purchase.

Delivery or completion date.

For construction projects in excess of \$500,000, language that sets a requirement for a bid guarantee in the amount of 5% of the bid price from all bidders, as well as performance and payment bonds in the amount of 100% of the contract price from the contractor awarded the bid. If federally grant funded, the bidders must also include costs for Davis Bacon compliance if that is a requirement of the federal agency providing the funding.

For construction projects over \$2,000, a statement that contractors will be provided with a copy of the most current wage determination (from the DOL website at <http://www.wdol.gov/dba.aspx>) and must comply with the Davis Bacon Act.

Language that reserves for the Selectboard the right at its sole discretion to reject any and all bids, wholly or in part, to waive any informalities or any irregularities therein, to accept any bid even though it may not be the lowest bid, to call for rebids, to negotiate with any bidder, and to make an award which in its sole and absolute judgment will best serve the Town's interest. The Selectboard reserves the right to investigate the financial condition of any bidder to determine his or her ability to assure service throughout the term of the contract.

Once a Request for Bids has been issued, the bid specifications will be available for inspection at the Town office.

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All bids must be submitted in sealed envelopes, addressed to the Town in care of the Selectboard, and plainly marked with the name of the bid and the time of the bid opening. Bid proposals will be date stamped on the outside of the envelope immediately upon receipt. Any bid may be withdrawn in writing prior to the scheduled time for the opening of bids. Any bids received after the time and date specified shall not be considered and shall be returned to the bidder unopened.

Bidders shall bid to specifications and any exceptions must be noted by the bidder. A bidder

submitting a bid thereby certifies that the bid is made in good faith without fraud, collusion, or connection of any kind with any other bidder for the same work, and that the bidder is competing solely on his/her behalf without connection with or obligation to any undisclosed person or firm.

c. BID OPENING.

Every bid received prior to the bid submission deadline will be publicly opened and read aloud by the Selectboard. The bid opening will include the name and address of bidder; for lump sum contracts, the lump sum base bid, and the bid for each alternate; for unit price contracts, the unit price for each item and the total, if stated; and the nature and the amount of security furnished with the bid if required.

d. CRITERIA FOR BID SELECTION.

In evaluating bids, the Selectboard will consider the following criteria:

- Price.
- Bidder's ability to perform within the specified time limits.
- Bidder's experience and reputation, including past performance for the Town.
- Quality of the materials and services specified in the bid.
- Bidder's ability to meet other terms and conditions, including insurance and bond requirements.
- Bidder's financial responsibility.
- Bidder's availability to provide future service, maintenance, and support.
- Nature and size of bidder.
- Local, minority, and women-owned businesses may be granted preference. Such preference may not exceed 15% of the lowest bid.
- Contract provisions that are acceptable to the Town.

- For construction projects over \$2,000, contractor's indication of acceptance of wages in the current wage determination provided as part of the Request for Bids.

- Any other factors that the Selectboard determines are relevant and appropriate in connection with a given project or service.

In addition to the above, in the case of a contract supported by federal funds, the additional criteria shall apply:

There shall be no preference exercised for local contractors or suppliers.

Minority and women-owned businesses must be included in the solicitation list for the request for proposal.

13. The Selectboard will not select a bidder who is listed on the Excluded Parties List System website (<https://www.sam.gov>).

e. CHANGE ORDERS.

If specification changes are made prior to the close of the bid process, the Request for Bids will be amended and notice shall be sent to any bidder who already submitted a bid and a new bid process will be initiated. Once a bid has been accepted, if changes to the specifications become necessary, the Selectboard will prepare a change order specifying the scope of the change. Once approved, the contractor and an authorized agent of the Town must sign the change order.

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If time does not permit the use of sealed bids, or the award will be made on the basis of non-price related factors, a competitive proposal process shall be initiated by the issuance of a Request for Bids (RFB) or Request for Qualifications (RFQ) prepared by the Selectboard or its designee that includes the factors that will be used to evaluate and compare the proposals. Bids or qualifications shall be obtained from an adequate number of qualified sources (at least two vendors) to ensure that the Town has received a fair and reasonable price and all notification and record keeping requirements of the sealed bid process shall be followed. If architectural or engineering services are being solicited, this process should be used with the most qualified firm or individual awarded the bid and price or fees negotiated after the award. If competitive proposals are used, all of the above steps in the sealed bid process should be followed except that: 1) the bid submission need not be sealed; and 2) price will not be the primary factor in the proposal selection.

ii. Sole Source Purchases.

If the Selectboard determines that there is only one possible source for a proposed purchase, it may waive the bid process and authorize the purchase from the sole source.

111. Recurring Purchases.

If the total value of a recurring purchase of a good or service is anticipated to exceed \$50,000 during any fiscal year, the bid process shall be utilized and shall specify the recurring nature of the purchase. Once a bid has been accepted, all future purchases shall be made from that bidder without necessity of additional bids, until such time as the Selectboard votes to initiate a new bid process.

iv. Emergency Purchases.

The Selectboard may award contracts and make purchases for the purpose of meeting the public emergency without complying with the bid process. Emergency expenditures may include immediate repair or maintenance of town property, vehicles, or equipment if the delay in such repair or maintenance would endanger persons or property or result in substantial impairment of the delivery of important Town services.

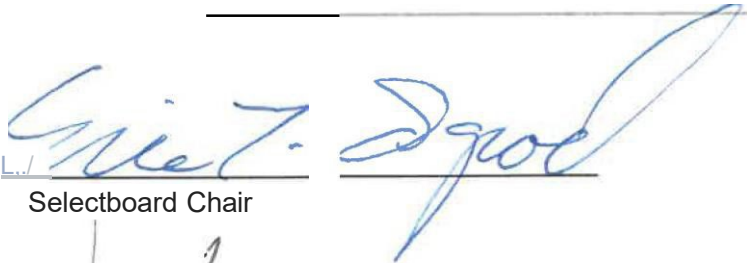
v. Professional Services.

The bid process shall not apply to the selection of providers for services that are characterized by a high degree of professional judgment and discretion including legal, financial, auditing, risk management, and insurance services.

Federally funded non-competitive purchases for \$250,000 or more require a cost analysis to determine the reasonableness of the proposed pricing and should be completed in accordance with the requirements of the federal or state agency issuing the grant funding.


The foregoing Policy is hereby adopted by the Selectboard of the Town of Johnson, Vermont, this 7th day of September 2021 and is effective as of this date until amended or repealed.


SIGNATURES.




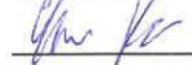
Selectboard Chair

Selectboard members:











**REQUEST FOR PROPOSAL
TOWN-WIDE REAPPRAISAL
ISSUED BY
Town of Johnson, VT
293 Lower Main Street W
P.O. Box 383
Johnson, Vermont, 05656
*Date of Issue: June 18, 2024***

Due Date for Proposal: July 15, 2024, at 4:00 p.m.

**TOWN OF JOHNSON
REQUEST FOR PROPOSAL
For
TOWN-WIDE REAPPRAISAL**

The Town of Johnson is requesting proposals from qualified, certified reappraisal contractors to work with the Johnson Assessor to complete the Townwide Reappraisal.

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 establishing the fair market value of all taxable property in Johnson.

Proposals are due by **July 15, 2024, at 4:00 p.m.** Paper copies of this request for proposal may be obtained by contacting Justin Mason at (802) 635-2611 or by email at listeners@townofjohnson.com

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 therewith, the interpretation and decision of the Town of Johnson shall be final and binding. Any corrections of errors or omissions in the Request for Proposal may be made by the Town of Johnson when such a correction is necessary for the proper fulfillment of their intention as constructed by the Town of Johnson. The signed agreement with the selected contractor will be binding and supersede this RFP.

INTRODUCTION

The Town of Johnson is in Central Lamoille County. Johnson is 46.20 square miles with 60.89 miles of roads of which 49.54 are town owned. There were 1,332 residents as of the 2020 census, with a median household income of \$49,016 for 2022.

We have a mix of residential, agricultural, and commercial properties. Our 2023 CLA (Common Level of Appraisal) is 74.15%, the COD (Coefficient of Dispersion) is 22.64%.

For the 2024 Grand List there were 1347 Total Listed Real Parcels. The parcel breakout is as follows:

R1	483
R2	251
MHU	172
MHL	129
S1	12
S2	32

C	56
CA	21
I	3
UE	9
UO	2
F	7
O	0
W	54
M	116

There are 63 non-taxable properties. The selected contractor will collect data and take pictures of these properties. There are also subdivided lots in the Town of Johnson that are listed as 1 parcel with 1 building lot and the Town of Johnson requests the selected contractor to add value to legally created subdivisions for additional building lots where allowed.

The Town uses MICROSOLVE CAMA software provided by New England Municipal Resource Center (NEMRC). All properties are currently listed using this software. The reappraisal project will be completed using this software.

DESCRIPTION OF PROJECT

The reappraisal project shall involve:

- Development of new land schedules and neighborhood delineations to establish land values for every site in town,
- Land, lake front, and depreciation schedules will adhere to the standard MicroSolve table structure,
- Formulating accurate, localized cost and depreciation schedules to develop a market adjusted cost approach for all types of properties.

These, and any other applicable methods, shall be incorporated into the existing MicroSolve CAMA software system and the existing property listing data will be reviewed to ensure compliance with the new analyses.

The contractor will work closely with the Johnson Assessor throughout the project. The Town will provide mailing services, and access to the existing CAMA system.

Project Purpose & Objectives

The objective of this reappraisal is to generate accurate, defensible valuations to reflect the Fair Market Value for every property in Johnson as of April 1 of the Townwide Reappraisal. In addition, the models shall be integrated into the CAMA system so that future construction, subdivisions, and changes to existing properties may be valued using the same methodologies.

AVAILABLE INFORMATION

- Examples of current land schedules and MICROSOLVE manuals
- Property descriptions from current CAMA Systems
- Tax Map and parcel data
- Previous Listers Cards
- Zoning permits and information

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 three years of sales information, verifying the sales information and correcting, as needed, the associated assessment information.
- C. The contractor shall review and refine neighborhood delineations, analyze vacant and improved property sales, and develop land-pricing schedules that result in accurate valuations for land values for every property in town. The new land schedules must also produce current Act # 60 Homestead site values.
- D. The contractor will visit each property and complete an interior inspection of all Residential (year-round and seasonal), Condominium, Farm and Commercial buildings and will update all sketches and photos for each property. Photos will include at least 2 opposite angles of each building that is not an outbuilding, so all sides of the building are captured and at least 1 photo of each outbuilding. The outbuildings shall be labeled in the CAMA notes section. The contractor shall come to an agreement with the Town Assessor for scheduling property visits and will be specified in the final contract.
- E. The contractor shall produce new models in the CAMA system for cost and depreciation, sales comparison, MRA, income and any other applicable valuation methods for all types of real property in Johnson.
- F. 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.
- G. The contractor shall produce, review, and verify fair market value for every property in Johnson which shall include a property record card, including inactive parcels.
- H. The Contractor, working with the Town, shall produce a Change of Assessment Notice to be mailed to every property owner as the official notification.
- I. The contractor shall conduct informal hearings for taxpayers to question the new assessment values and shall assist the Town with the formal Listers' grievances and Board of Civil Authority appeals.
- J. The contractor shall produce manuals clearly explaining the valuation methods, the data, and the processes to aid the Town in defending the new assessments, neighborhood codes and areas, 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.

- K. The contractor shall complete all these activities in compliance with Vermont's "Three-Prong Test" and accepted appraisal practices, conforming to all applicable state statutes and rules.
- L. All data, maps, reports, forms, and worksheets used or developed for this reappraisal shall belong to the Town of Johnson.

DELIVERABLES

The final work product will be the completed Grand List Change of Assessment Notices, updates to the MICROSOLVE CAMA software that reflect the new land schedules and updated cost, income and market models and the successful completion of the informal appeals. The documentation produced for this project shall include: a new land valuation manual that includes neighborhood delineations, land schedules and descriptions of adjustments, a copy of the sales file and adjustments made to create the land schedule, copies of any data collection or review manuals developed for, or used during this project, a map containing neighborhood codes, and copies of any other manuals, tables or reference materials developed or used during this project; property record cards for each parcel. Properties with multiple residences shall have a property record card for each residence.

ADMINISTRATIVE INSTRUCTIONS

The proposals are due by **July 15, 2024, at 4:00 p.m.** Complete paper proposals shall be submitted in a sealed envelope, clearly marked as **JOHNSON TOWNWIDE REAPPRAISAL**, and addressed to:

Johnson Assessor's Office: 293 Lower Main Street W, Johnson, VT, 05656

P.O. Box 383, Johnson, VT, 05655

or emailed to: listeners@townofjohnson.com

The work shall not be assigned or sublet without the previous consent of the Town of Johnson and shall not either legally or equitably assign any of the money payable under this agreement, unless by and with the consent of the Town of Johnson. The Town of Johnson will work with the selected contractor to specify specific details for scheduling and other mentioned items and terms prior to signing the contract. The Town of Johnson and the Contractor will agree to a retention rate prior to the signing of the contract to evaluate the completion of the Townwide Reappraisal.

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. Schedule of work by task
- H. List of all municipal reappraisals currently underway or completed within the last five years including client contacts and references.

The evaluation of the proposal will be based on:

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

TOWN CONTACT

Justin Mason
Assessor - Town of Johnson
293 Lower Main Street W
Johnson, VT, 05656
Telephone: (802) 635-2611
E-Mail: listeners@townofjohnson.com