

**SPECIAL COUNCIL MEETING
Tuesday, June 22, 2021, 6:00pm**

**This is a Hybrid Meeting (In-person and Virtual)
Council Chambers in City Hall**

<https://zoom.us/j/95854555619?pwd=OUtaTWN1ZHg3OUV3L3BSOEExSSTN6UT09>

Meeting ID: 958 5455 5619

Passcode: 992757

1-929-205-6099

1. Call to Order – 6:00 p.m.
2. Adjustments to the Agenda
3. Visitors and Communications
4. Executive Session:
 - A. Contracts
5. Adjourn

**REGULAR COUNCIL MEETING
Tuesday, June 22, 2021, 7:00pm**

**This is a Hybrid Meeting (In-person and Virtual)
Council Chambers in City Hall**

<https://zoom.us/j/95854555619?pwd=OUtaTWN1ZHg3OUV3L3BSOEExSSTN6UT09>

Meeting ID: 958 5455 5619

Passcode: 992757

1-929-205-6099

1. Call to Order – 7:00 p.m.
2. Adjustments to the Agenda
3. Consent Agenda
 - A. Approval of Minutes of the Regular City Council Meeting June 15, 2021
 - B. Approval of City Warrants from Week of Wednesday June 23, 2021
 - C. Clerk's Office Licenses and Permits
 - D. Acceptance of Donation from the Hollow Inn
 - E. Authorize Purchase of City Hall Alertus Security Software/Hardware (HR Administrator)
 - F. Selection of Re-Appraisal Contractor (Planning Director/Interim Assessor)
 - G. Ratify Manager's Execution FY22 Fuel Oil and Propane Contracts
 - H. Authorization to Award Contract for City Hall Heat Pumps
4. City Clerk & Treasurer Report
5. Liquor Control Board
6. City Manager's Report
7. Visitors and Communications
8. Old Business:
 - A. Review/Approved City Fee Schedule Changes (Clerk)
9. New Business
 - A. Council Approval of Property Tax Due Dates for FY22 (Clerk)
 - B. Award of Paving Bid (DPW Director)
 - C. Appointment of:
 - i. Alexander Raeburn to the Police Advisory Committee
 - ii. Heather Milne Ritchie to the Cemetery Committee
 - iii. Nancy Wolfe to the Recreation Committee
 - iv. Janelle Starr to the Recreation Committee
 - v. Michael Hellein to the Development Review Board
 - vi. Pete Fournier to the Development Review Board
 - D. Public Art Committee (Jeffrey Tuper-Giles)

- E. Re-establishment of Organics Diversion Committee as Task Force
 - i. Appointment of Samn Stockwell to Task Force
- F. Discuss Recommendations to Provide to the Planning Commission (Mayor)
- G. City Of Barre FY22 Annual Appointments (Mayor)

- 10. Round Table
- 11. Executive Session – As Needed
- 12. Adjourn

Steven E. Mackenzie, P.E., City Manager

*The portion of this meeting starting at 7:00pm will be taped for re-broadcast on Channel 192 CVTV and will be re-broadcast on Wednesday at 9:00 a.m. and 12:00 noon
CVTV Link for meetings online – cvtv723.org/*

OTHER MEETINGS AND EVENTS

Until further notice, Committee and Board meetings may be held only via video (virtual) platforms. **Check the City Web Site for Meeting Warnings, Agendas and log-in instructions.**

Monday, June 21

Diversity and Equity Committee, 6pm, Virtual (ZOOM)

Tuesday, June 22

Animal and Fowl Task Force, 6pm, Virtual (ZOOM)

Thursday, June 24

Planning Commission, TBD (check the Agenda on the city website)

Ground Rules for Debating

- Rules may be reviewed periodically
- Practice Mutual Respect
 - Assume Good Intent and Explain Impact
 - Ask Clarifying Questions
 - If off course, interrupt and redirect
- Think, then A.C.T.
 - Alternatives – Identify All Choices
 - Consequences – Project Outcomes
 - Tell Your Story – Prepare Your Defense
- Ethics checks
 - Is it legal?
 - Is it in scope (Charter, Ordinance, Policy)?
 - Is it balanced?
- “ELMO” – Enough, Let’s Move On
 - Honor Time Limits
 - Be attentive, not repetitive
- Be open minded to different solutions or ideas
 - Remarks must be relevant and appropriate to the discussion; stay on subject.
 - Don’t leave with “silent disagreement”
 - Decisions agreed on by consensus when possible, majority when necessary
 - All decisions of Council are final
- No blame
 - Articulate Expectations of each other
 - We all deeply care about the City in our own way
 - Debate issues, not personalities
- Electronics
 - No texting/email/or videogames during the meeting
 - No notes are taken during Executive Session



City of Barre, Vermont

“Granite Center of the World”

Steven E. Mackenzie, P.E.
City Manager

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Barre, VT 05641
Telephone (802) 476-0240
FAX (802) 476-0264
manager@barrecity.org

MEMO

TO: City Council
FR: The Manager
DATE: 06/18/21
SUBJECT: Packet Memo re: 06/22/21 Council Agenda Items

Councilors:

The following notes apply to packet support material for the Subject Council Agenda:

General Info:

Hybrid Meeting Format: We are transitioning to a “Hybrid” meeting venue (i.e. In-Person with Virtual [ZOOM] access as well). With a Councilor(?) ZOOM platform assistance, the Mayor will attempt to conduct the meeting accordingly. We had hoped to be fully transitioned by this time, but the lead time on the necessary hardware is longer than we assumed last Tuesday. I am “cautiously optimistic” ☺ that we will be in permanent Hybrid mode NLT our 1st meeting in July on 7/13. As an FYI, we estimate the cost to make this transition to be in the magnitude of \$4,500 +/-, which we will post to Council Expenses in this year’s FY21 GF Budget. We will also flag these costs for recovery should they be determined eligible for ARPA funding and the Council chooses to so apply.

Grand List Update: Interim Assessor Janet Shatney has prepared a brief memo for your information addressing *Lodging of the Grand List and Change of Appraisal Time-Line*. Her memo immediately follows this Packet Memo.

Executive Session 6:00 p.m.:

This will be virtual. Subject Matter: “**Contracts**”.
I will transmit under separate cover any *Confidential* support documents as soon as possible.

Adjustments to the Agenda: - None at this time

Consent Agenda: - No *Consent Agenda* notes

New Business: - No *New Business Agenda* Notes



City of Barre, Vermont

"Granite Center of the World"

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Barre, VT 05641
Office Telephone (802) 476-0245
Direct Line (802) 477-1465

MEMORANDUM

TO: Mayor, Councilors
CC: Manager, Clerk/Treasurer
FROM: Janet Shatney, Interim Assessor
DATE: June 18, 2021
RE: Lodging the Grand List – change of appraisals timeline

I wanted to give you an idea of where the Assessing office is at with the grand list and timeframes that we are working with.

For your information, according to statute, April 1 annually is the date at which any municipality completes the abstract, according to statute language (32 VSA §4111). What this is telling us is that April 1 is the Assessment Date. The value of all property must be determined as of April 1.

There are specific dates by which municipalities must lodge the Abstract, or the draft grand list. Because our municipality has a population of greater than 5,000, our deadline to lodge is **no later than June 24th annually**.

Our Abstract will be lodged (recorded) on Thursday, June 24, 2021. This means that a draft grand list will be created and printed. The Abstract shows any changes of value assigned by the Assessor, meaning those properties that have received some change in value over the previous year, and as of April 1.

On the same day that the Abstract is lodged, change of appraisal notices are sent to those property owners that received a change in value. The June 24th lodging also means that there is a 14-day notice period by which anyone, not only those that receive changes of appraisal, but ANYONE who chooses to request a change, must notify my office that they are grieving their assessment. Such a request must come from the property owner of record.

On July 8, 2021 (14 days after the change of appraisals are sent), grievance hearings begin. Grievances can be handled different ways; via email, or via written letter. Those filing a request can ask to be heard at a grievance hearing, or have the request handled administratively.

Timing for lodging the final Grand List, setting the municipal tax rate, printing and mailing tax bills is a coordinated effort between the Assessor's Office and the Clerk's Office. Here is the tentative schedule for this year:

Lodge the Abstract (draft) Grand List	June 24, 2021
Begin grievance hearings	July 8, 2021
Send grievance decisions and lodge final grand list	By July 26, 2021
Council to set municipal tax rate	July 27, 2021
Tax bill file created and sent to printer	By August 6, 2021
Tax Bills mailed to property owners	By August 15, 2021
First quarter due date	September 15, 2021

For further information on the tax bills, see Clerk's memo to Council in packet for Agenda Action Item 9A.

To be approved at 06/22/21 Barre City Council Meeting

**Special Meeting of the Barre City Council
Held June 15, 2021**

The Special Meeting of the Barre City Council was called to order on video conference by Mayor Lucas Herring at 6:02 PM. In attendance, participating on video or phone, were: From Ward I, Councilors Emel Cambel and Jake Hemmerick; from Ward II, Councilors Michael Boutin (arrived 6:10 PM) and Teddy Waszazak; and from Ward III, Councilors Ericka Reil and Samn Stockwell. City staff members present via video or phone were City Manager Steve Mackenzie and Clerk/Treasurer Carol Dawes.

Absent: NONE

Adjustments to the Agenda: NONE

Visitors and Communications – NONE

Executive Session –

Councilor Stockwell made the motion to find that premature general knowledge of litigation, personnel, and real estate issues to be discussed would clearly place the City of Barre at a substantial disadvantage should the discussion be public. The motion was seconded by Councilor Reil. **Motion carried on roll call, with all voting in favor.**

Council went into executive session at 6:04 PM to discuss litigation, personnel, and real estate under the provisions of 1 VSA sec. 313 on motion of Councilor Waszazak, seconded by Councilor Cambel. **Motion carried on roll call vote, with all voting in favor.**

Manager Mackenzie and Clerk Dawes were invited into the executive session. Councilor Boutin arrived during the executive session. Clerk Dawes left the executive session after the litigation discussion.

Council came out of executive session at 6:58 PM on motion of Councilor Stockwell, seconded by Councilor Hemmerick. **Motion carried on roll call vote, with all voting in favor.**

No action was taken.

The Council meeting was adjourned by Mayor Herring at 6:58 PM.

There is no audio recording of this meeting. The open portion of the meeting was recorded on the video conference platform.

**Regular Meeting of the Barre City Council
Held June 15, 2021**

The Regular Meeting of the Barre City Council was called to order on video conference by Mayor Lucas Herring at 7:00 PM. In attendance, participating on video or phone, were: From Ward I, Councilors Emel Cambel and Jake Hemmerick; from Ward II, Councilor Teddy Waszazak; and from Ward III, Councilors Ericka Reil and Samn Stockwell. City staff members present via video or phone were City Manager Steve Mackenzie, Fire Chief Doug Brent, Deputy Fire Chief Joseph Aldsworth, Fire Marshall Robert Howarth, Planning Director Janet Shatney, and Clerk/Treasurer Carol Dawes.

Absent: From Ward II, Councilor Michael Boutin.

Adjustments to the Agenda: NONE

To be approved at 06/22/21 Barre City Council Meeting

Approval of Consent Agenda:

Council approved the following consent agenda items on motion of Councilor Waszazak, seconded by Councilor Reil. **Motion carried on roll call vote, with all voting in favor.**

- A. Minutes of the following meetings:
 - a. Regular meeting of June 8, 2021
 - b. Special meeting of June 10, 2021
- C. City Warrants as presented:
 - a. Approval of Week 2021-24, dated June 16, 2021:
 - i. Accounts Payable: \$135,115.07
 - ii. Payroll (gross): \$125,600.45
- D. 2021 Licenses & Permits:
 - a. Food Vending License:
 - i. The Melted Cheesiere, for Food Truck Thursdays in Currier Park
- E. Approval of Annual Supply Bid Awards
- F. Authorize City Manager to Request ARPA Funds for the City of Barre

The City Clerk/Treasurer Report –

Clerk/Treasurer Dawes reported on the following:

- The Barre Unified Union School District budget was approved by Barre City and Barre Town voters at last week's June 9th election. The Agency of Education will wait at least 30 days before calculating the education tax rates, therefore the Clerk will ask Council to set the first quarter payment due date for September 15th instead of August 15th. The request will come to Council at next week's meeting.
- Attended exit conference with the State Auditor's Office re. the TIF audit. The final draft was received yesterday and the City has two weeks to submit its response.

The Clerk noted there are a number of emergency legislations that expire with tonight's expiration of the Governor's emergency order including allowing all-virtual meetings, returning to usual open meeting laws, waiving deadlines and late fees for state licenses and permits, and the moratorium on water/sewer disconnections.

Liquor Control – NONE

City Manager's Report - Manager Mackenzie noted his written weekly report included in the Council packet, and said he is cautiously optimistic the City will meet the goal of having the municipal pool open by June 27th.

Visitors and Communications – Mayor Herring said Council will meet in person next week in the Council chambers. There was discussion about offering hybrid in person/virtual meetings. Staff members are researching the technologies that will be needed to allow regular hybrid meetings. This is likely to take some time to put in place. The Mayor announced the Rotary Club's grant to make improvements at Rotary Park did not make the grant deadline, and Cornerstone Field is still under repair, and the ribbon cutting has been scheduled for next year.

Old Business –

A) Second Reading and Public Hearing Warned 7:15 pm Ordinance #2021-03: Chapter 17 Traffic.

Mayor Herring opened the public hearing at 7:14 PM and invited comments and questions from the public. Merchant Street resident Jesse Rosado said the proposed changes to issuing municipal traffic tickets is taxation by citation, and the ACLU opposes such actions. Mayor Herring said the change will not generate additional tickets, it will only allow the City to retain more of the ticket revenue already being generated by the tickets being written. Hearing no additional public comments, the Mayor closed the public hearing at 7:17 PM and invited comments and questions from the Council. There were no additional comments or questions.

Council approved the revisions to Chapter 17 Traffic on motion of Councilor Hemmerick, seconded by Councilor Reil. **Motion carried on roll call vote, with all voting in favor.**

B) Review/Approved City Fee Schedule Changes.

This item is deferred to next week.

New Business –

A) Legislative Update.

Barre City Representatives Peter Anthony and Tommy Walz, and Washington County Senators Ann Cummings, Anthony Pollina and Andrew Perchlik gave updates on the 2021 legislative session:

- Rep. Anthony: working on updating pupil weighting system, which will benefit the City by making adjustments to the way education tax rates are calculated; getting in front of the deficits in the state, municipal and teacher pension systems; approved changes to the election laws that enfranchise voters by increasing accessibility. Resident Rosemary Averill asked Rep. Anthony why he voted against Barre City's voter-approved flag charter change. Rep. Anthony said it's better for the Council to take action on the issue and not tie the hands of future Councils.
- Rep. Walz: Approval of the apology for eugenics projects supported by past legislatures; increasing investment in housing rehabilitation; converted the emergency legislation to permanent law that allows to-go service of alcohol; were unsuccessful in establishing a state-wide rental registry program similar to the one in place in Barre City. Councilor Waszazak asked legislators to advocate for American Rescue Plan funds allocated to counties to be reallocated to municipalities.
- Sen. Cummings: Provided significant business assistance with federal funds; lowered the education tax rate due to the balance in the education fund; increased the earned income tax credit for the year due to the pandemic; working on access to broadband and affordable childcare.
- Sen. Pollina: Working on consolidation of public safety with a focus on homelessness and mental health.
- Sen. Perchlik: Growing the clean economy; allocated more money for municipal transportation spending and school construction.

There was discussion on making changes to state law that requires the legislature to approve any actions on the local level due to Vermont being a Dillon's Rule state.

B) Appointment of Nancy Wolfe to the Recreation Committee.

Ms. Wolfe wasn't present, so this item is deferred.

C) Appointment of Janelle Starr to the Recreation Committee.

Ms. Starr wasn't present, so this item is deferred.

D) Appointment of Jim McWilliams to the Planning Commission.

Jim McWilliam expressed his interest in serving on the Planning Commission. [N.B. there is no "s" on the end of Mr. McWilliam's last name.] Council approved the appointment on motion of Councilor Waszazak, seconded by Councilor Cambel. **Motion carried on roll call vote, with all voting in favor.**

E) Vacant Building Ordinance Update.

Fire Chief Doug Brent and Fire Marshall Robert Howarth reviewed the vacant building information provided in the Council packet and noted there are currently 28 properties on the list. There was discussion on inspections, removing the fire chief from the appeal process and either naming an appeal committee or having the Council hear appeals, tax sale properties, how to deal with accumulations of garbage and rodents on abandoned properties, and funding support from Downstreet Community Housing for rehabilitating properties.

F) Committee Charge and Priorities

i. Recreation Committee

Recreation Committee chair Linda Couture presented the committee's objectives. There was discussion on mapping the City's playgrounds and parks on the City website. There was also discussion on replacing the sign at Charlie's Playground to reflect the name change. Council approved the charge and priorities on motion of

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Councilor Waszazak, seconded by Councilor Hemmerick. **Motion carried on roll call vote, with all voting in favor.**

G) Briefing on Proposed Barre City Municipal Government “Reopening Plan”.

Manager Mackenzie reviewed his reopening plan, which calls for City Hall to reopen beginning Monday, June 21st, with no restrictions. Council gave informal approval.

H) Review and/or Approve Changes to the Rules of Procedures Policy.

Council reviewed the changes on meeting schedules and the makeup of agendas, and regular meetings vs. special meetings. Council approved the changes on motion of Councilor Hemmerick, seconded by Councilor Stockwell. **Motion carried.**

I) Presentation of Annual Internal Financial Controls Checklist.

Clerk Dawes said she is required by statute to present the checklist to Council on an annual basis. No action is required.

Round Table –

Councilor Reil congratulated the state of Vermont for reaching the goal of 80% vaccination for COVID.

Councilor Stockwell said she is grateful for her neighbors who are mowing the old railroad bed and have planted flowers.

Councilor Hemmerick said he is grateful for a recent walk through Hope Cemetery with a neighbor.

Councilor Cambel said people are enthusiastic to have been vaccinated, and there continue to be clinics available for those who haven't yet received the vaccine.

Councilor Waszazak said he attended a ball game at Fenway Park this past weekend, as the country opens up after COVID. He expressed his gratitude to the US Senate for unanimously approving Juneteenth as a federal holiday.

Mayor Herring said there are ongoing conversations about those moving into homelessness as the emergency voucher program ends. Those involved in the conversation include the state, neighboring communities, and mental health providers. There are 72 people in our area who need housing.

The Council meeting was adjourned by Mayor Herring at 9:37 PM.

There is no audio recording of this meeting. The meeting was recorded on the video conference platform.

Respectfully submitted,

Carolyn S. Dawes, City Clerk

06/18/21
02:32 pm

City of Barre Accounts Payable
Warrant/Invoice Report # 21-51

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dmcnally

By check number for check acct 01(GENERAL FUND) and check dates 06/23/21 thru 06/23/21

Vendor	PO Number	Invoice Number	Invoice Description	Account Number	Account Description	PO Amount	Invoice Amount	Check
01122 ABILITY NETWORK INC		21R0001199	software	001-1000-130.0161	PREPAIDS	0.00	4,347.00	141341
01142 AFLAC		177176	monthly premium	001-2000-240.0019	AFLAC PAYABLE	0.00	4,447.00	141342
01150 AIRGAS USA LLC		9113988509	carbon dioxide,lease,fees	001-7015-320.0730	POOL & BLD MAINT	0.00	1,018.72	141343
01165 ALL TEMP HVAC/R		7084	labor,mileage,freon	003-8330-320.0727	BLDG & GROUNDS MAINT	0.00	363.00	141344
01013 ALLAN JONES & SONS INC		77132	2 tires	001-8050-320.0740	EQUIPMENT MAINT - STS	0.00	218.00	141345
01060 AMAZON CAPITAL SERVICES		WVL4-051721	desk converter	001-8020-440.1240	COMPUTER EQUIP/SOFTWARE	0.00	159.95	141346
01049 AMERICAN TOWER CORP		3621210	tower lease	001-6055-320.0725	TOWER RENTAL FEE	0.00	173.89	141347
23018 AUBUCHON HARDWARE		499850	syringe,tough & wide	003-8300-320.0752	MAIN LINE MAINT VACCON	0.00	23.65	141348
		499906A	mixer drill	001-7020-470.1270	MACHINES/EQUIPMENT OUTLAY	0.00	10.79	141348
		499915A	thinners,rollers	001-7020-470.1270	MACHINES/EQUIPMENT OUTLAY	0.00	80.02	141348
		499945	bucket	001-7020-470.1270	MACHINES/EQUIPMENT OUTLAY	0.00	53.88	141348
		499947	mixer drill	001-7020-470.1270	MACHINES/EQUIPMENT OUTLAY	0.00	10.79	141348
		499959	coverall,brush	001-7020-470.1270	MACHINES/EQUIPMENT OUTLAY	0.00	38.67	141348
						0.00	217.80	
02131 BARRE UNIFIED UNION SCHOOL DISTRIC		061521	4th qtr balance due	001-4005-405.4005	GENERAL TAXES	0.00	85,549.19	141349
02208 BDP INDUSTRIES		13248	tracking cylinders,freigh	003-8330-320.0740	EQUIPMENT MAINT	0.00	1,864.49	141350
02144 BERGERON PROTECTIVE CLOTHING LLC		227307	hats,logos,labor,freight	001-6040-340.0940	CLOTHING	0.00	591.98	141351
02245 BRENT DOUG		061421	reimb meals	001-6040-130.0182	TRAVEL & MEALS	0.00	69.19	141352
02294 BULLARD JONATHAN		060921	clothing	001-6050-340.0940	CLOTHING	0.00	180.13	141353
02055 BURLINGTON COMMUNICATIONS SERVICE		BGS8455	labor,travel charge	001-6055-320.0724	RADIO MAINTENANCE	0.00	1,210.00	141354
03062 C FORD PROFESSIONAL LETTERING		15128	signs	051-0280-360.1167	ESTATE BEQUEST PROJECTS	0.00	197.00	141355

By check number for check acct 01(GENERAL FUND) and check dates 06/23/21 thru 06/23/21

Vendor	PO Number	Invoice Number	Invoice Description	Account Number	Account Description	PO Amount	Invoice Amount	Check

03043 CASELLA WASTE MGT INC		2553134	trash removal	001-7020-200.0213	RUBBISH REMOVAL	0.00	396.06	141356
		2553134	trash removal	001-8050-200.0213	RUBBISH REMOVAL	0.00	335.18	141356
		2553134	trash removal	001-6043-200.0213	RUBBISH REMOVAL	0.00	229.55	141356
		2553134	trash removal	001-7035-200.0213	RUBBISH REMOVAL	0.00	320.72	141356

						0.00	1,281.51	
03133 COTE TREVOR		045000030000	prop tax overpayment	001-4005-405.4005	GENERAL TAXES	0.00	6.81	141357
03203 CW PRINT + DESIGN		81080	architectural print	001-5060-360.1165	PROGRAM MATERIALS	0.00	20.00	141358
04120 DAWES CAROLYN S		061421	election supplies	001-5060-360.1165	PROGRAM MATERIALS	0.00	5.98	141359
		061421	election supplies	050-2000-230.0288	BAN PAYABLE	0.00	1.45	141359

						0.00	7.43	
04130 DEMELL WILLIAM M		060121	boots	001-8050-340.0943	FOOTWARE	0.00	111.72	141360
04106 DUBOIS & KING INC		621090	professional services	003-8533-500.1400	900K-ANAEROBIC DIGESTER	0.00	669.18	141361
05062 EASTMAN JR LARRY		061521	boots	001-6050-340.0943	FOOTWARE	0.00	168.89	141362
05059 ENDYNE INC		373846	lab services	003-8330-320.0749	WASTEWATER SAMPLING/TESTI	0.00	310.00	141363
		374106	lab services	002-8220-320.0749	WATER SAMPLING/TESTING	0.00	100.00	141363

						0.00	410.00	
05007 EVERETT J PRESCOTT INC		5865873	flanges	002-8200-320.0750	MAIN LINE MAINT	0.00	41.80	141364
		5867842	valve box covers	002-8200-320.0750	MAIN LINE MAINT	0.00	45.48	141364
		5871194	flanges	003-8330-320.0740	EQUIPMENT MAINT	0.00	1,465.85	141364
		5871628	caps,grip ring acc packs	002-8200-320.0740	EQUIPMENT MAINT	0.00	286.06	141364
		5871677	flanges	002-8200-320.0750	MAIN LINE MAINT	0.00	35.00	141364
		5872235	valves,tees,boxes,rings	002-8200-320.0750	MAIN LINE MAINT	0.00	2,410.18	141364
		5872415	valve box covers	002-8200-320.0750	MAIN LINE MAINT	0.00	318.36	141364
		5872520	wing nut plugs	002-8200-320.0750	MAIN LINE MAINT	0.00	57.50	141364
		5874502	tapping compound	002-8200-320.0750	MAIN LINE MAINT	0.00	33.01	141364

						0.00	4,693.24	
06009 F W WEBB CO		71706266	curb stops,tees	002-8200-320.0750	MAIN LINE MAINT	0.00	4,469.62	141366

By check number for check acct 01(GENERAL FUND) and check dates 06/23/21 thru 06/23/21

Vendor

PO Number	Invoice Number	Invoice Description	Account Number	Account Description	PO Amount	Invoice Amount	Check
	71826604	pipe, adapters, screws, solv	001-7015-320.0730	POOL & BLD MAINT	0.00	142.62	141366
					0.00	4,612.24	
06070 FIRST NATIONAL BANK OMAHA							
	060221	wire, latch, caps	022-0280-360.1197	TREE PURCHASING	0.00	798.46	141367
	060221	wire, latch, caps	001-8035-320.0727	MAIN ST MAINTENANCE	0.00	227.45	141367
	060321	flights, tool box, water	001-6040-320.0726	MAINT FIRE ALARM/NEW BOX	0.00	255.99	141367
	060321	flights, tool box, water	001-6050-360.1161	INVESTIGATIONS MATERIALS	0.00	192.00	141367
	060321	flights, tool box, water	001-6050-360.1161	INVESTIGATIONS MATERIALS	0.00	2,657.68	141367
	060321	flights, tool box, water	001-6040-130.0182	TRAVEL & MEALS	0.00	75.00	141367
					0.00	4,206.58	
06065 FISHER AUTO PARTS							
	656776	battery	001-8500-320.0740	EQUIPMENT MAINT	0.00	45.92	141368
	657478	battery	001-8500-320.0740	EQUIPMENT MAINT	0.00	45.92	141368
					0.00	91.84	
07167 G TOSI CO THE							
	50432	pymt 3 of 3-tablet, bench	001-8040-320.0725	PUB PARKS/TREES MAINT	0.00	3,281.66	141369
07024 GAYLORD AMOS							
	060721	K-9 maint 12/6/20-6/6/21	001-6050-360.1159	K-9	0.00	650.00	141370
	06082	fuel for K-9 training	001-6050-330.0835	VEHICLE FUEL	0.00	38.48	141370
					0.00	688.48	
07138 GREAT EASTERN RADIO LLC							
	64214-1	radio spots 2/13-2/16	001-5070-230.0510	ADVERTISING (TAXES)	0.00	320.00	141371
	64215-1	radio spots 2/13-2/16	001-5070-230.0510	ADVERTISING (TAXES)	0.00	320.00	141371
	64216-1	radio spots 2/13-2/16	001-5070-230.0510	ADVERTISING (TAXES)	0.00	160.00	141371
					0.00	800.00	
07006 GREEN MT POWER CORP							
	01770-0521	59 Parkside Terr lights	001-6060-200.0210	ELECTRICITY	0.00	36.83	141372
	01770-0521	59 Parkside Terr lights	001-7015-200.0211	ELECTRICITY-POOL	0.00	24.55	141372
	049710-0521	E Cobble Hill Rd water ps	002-8200-200.0205	ELECTRICITY-FIRE DISTRICT	0.00	214.72	141372
	07890-0521	Cobble Hill Mdws water ps	002-8200-200.0210	ELECTRICITY - COBBLE HILL	0.00	144.04	141372
	149710-0521	Rt 302 prv	002-8200-200.0212	ELECTRICITY - RT 302 POLE	0.00	1.24	141372
	405860-0521	Main St lights	001-6060-200.0210	ELECTRICITY	0.00	373.47	141372
	579510-0521	Hill St/Washington St	001-6070-200.0210	TRAFFIC LIGHT ELECTRICITY	0.00	117.96	141372
	72080-0521	S Main St/Parkside Terr	001-6070-200.0210	TRAFFIC LIGHT ELECTRICITY	0.00	89.65	141372
	93423-0521	W Cobble Hill ws vault	002-8200-200.0209	ELECTRICITY - W CBL HL VA	0.00	247.51	141372
	951210-0521	Hill St/Ayers St light	001-6070-200.0210	TRAFFIC LIGHT ELECTRICITY	0.00	101.03	141372
					0.00	1,351.00	
07003 GUSTIN AMANDA							
	060921	election	001-5060-100.0110	PERSONNEL SERVICES	0.00	14.69	141374

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City of Barre Accounts Payable
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By check number for check acct 01(GENERAL FUND) and check dates 06/23/21 thru 06/23/21

Vendor	PO Number	Invoice Number	Invoice Description	Account Number	Account Description	PO Amount	Invoice Amount	Check
09011 IAFC MEMBERSHIP		060921	membership-D Brent	001-1000-130.0161	PREPAIDS	0.00	230.00	141375
09021 IRVING ENERGY		3879067	late fee	002-8220-330.0836	BOTTLED GAS	0.00	2.16	141376
		651217	propane	001-7035-330.0836	BOTTLED GAS	0.00	849.87	141376
						-----	852.03	
10003 JARVIS MICHAEL		060921	election	001-5060-100.0110	PERSONNEL SERVICES	0.00	52.88	141377
11003 KOALENZ-ROSA KIMBERLIE		060921	election	001-5060-100.0110	PERSONNEL SERVICES	0.00	158.63	141378
11051 KOSAKOWSKI JOSHUA		061021	CDL renewal	002-8220-130.0180	TRAINING/DEVELOPMENT	0.00	110.00	141379
12124 LAUZON KAREN		060921	election	001-5060-100.0110	PERSONNEL SERVICES	0.00	14.69	141380
12054 LAWSON PRODUCTS INC		9308505798	discs, freight	001-8050-350.1061	SUPPLIES - GARAGE	0.00	501.47	141381
12138 LEPAGE JOHN		060921	election	001-5060-100.0110	PERSONNEL SERVICES	0.00	64.63	141382
12009 LOWELL MCLEODS INC		865766	springs,u-bolts,pins	001-8050-320.0743	TRUCK MAINT - STS	0.00	1,107.27	141383
13102 MACKENZIE STEVEN E		061821	subscription,jotform,zoom	001-5010-130.0184	CITY COUNCIL'S EXPENSES	0.00	120.22	141384
		061821	subscription,jotform,zoom	001-5040-130.0184	MANAGER'S EXPENSES	0.00	18.58	141384
						-----	138.80	
13061 MAINE OXY		32298135	finance charge	001-7030-350.1053	SUPPLIES/EQUIPMENT	0.00	3.25	141385
13188 MAZA PATRICIA		060921	election	001-5060-100.0110	PERSONNEL SERVICES	0.00	52.88	141386
13019 MILLER ROBERT		060721	boots	001-6050-340.0943	FOOTWARE	0.00	166.39	141387
13017 MORGAN ELIJAH		16	mileage	001-8020-130.0182	TRAVEL/MEALS	0.00	14.95	141388
13210 MVP HEALTH CARE INC		15288907	prem 7/1-7/31/21	001-2000-240.0008	HEALTH PAYABLE	0.00	6,844.76	141389

By check number for check acct 01(GENERAL FUND) and check dates 06/23/21 thru 06/23/21

Vendor

PO Number	Invoice Number	Invoice Description	Account Number	Account Description	PO Amount	Invoice Amount	Check
	15288907	prem 7/1-7/31/21	001-9020-110.0151	HEALTH INSURANCE	0.00	79,236.55	141389
	15288907	prem 7/1-7/31/21	002-8200-110.0151	BLUE CROSS/BLUE SHIELD	0.00	2,892.26	141389
	15288907	prem 7/1-7/31/21	002-8220-110.0151	BLUE CROSS/BLUE SHIELD	0.00	2,865.87	141389
	15288907	prem 7/1-7/31/21	003-8300-110.0151	BLUE CROSS/BLUE SHIELD	0.00	3,015.47	141389
	15288907	prem 7/1-7/31/21	003-8330-110.0151	BLUE CROSS/BLUE SHIELD	0.00	4,858.84	141389

					0.00	99,713.75	
14016 NELSON ACE HARDWARE							
	062021	key, freight	001-6050-340.0941	EQUIPMENT - SAFETY	0.00	1.70	141390
	062021	key, freight	001-6045-350.1055	METER SUPPLIES	0.00	25.55	141390
	251886	screws	001-5040-440.1240	COMPUTER EQUIP/SOFTWARE	0.00	15.29	141390

					0.00	42.54	
14078 NEW ENGLAND AIR SYSTEMS LLC							
	176167	labor, trip chg, test, caulk	001-7035-320.0727	BLDG & GROUNDS MAINT	0.00	602.21	141391
14134 NORTHEAST DELTA DENTAL							
	070121	prem 7/1-7/31/21	001-9020-110.0153	DENTAL INSURANCE	0.00	33.22	141392
	070121	prem 7/1-7/31/21	001-9020-110.0153	DENTAL INSURANCE	0.00	2,673.50	141392
	070121	prem 7/1-7/31/21	002-8200-110.0153	DENTAL INS	0.00	151.84	141392
	070121	prem 7/1-7/31/21	002-8220-110.0153	DENTAL INS	0.00	73.64	141392
	070121	prem 7/1-7/31/21	003-8300-110.0153	DENTAL INSURANCE	0.00	118.96	141392
	070121	prem 7/1-7/31/21	003-8330-110.0153	DENTAL INSURANCE	0.00	4.94	141392
	070121	prem 7/1-7/31/21	001-2000-240.0018	DENTAL PAYABLE	0.00	2,376.19	141392

					0.00	5,432.29	
14121 NORTHFIELD AUTO SUPPLY							
	339993	wrench	001-8050-350.1060	SMALL TOOLS	0.00	36.49	141393
	340361	filter, oil	001-6050-320.0720	VEHICLE MAINTENANCE	0.00	27.59	141393
	340449	batt cable connector	001-8050-320.0740	EQUIPMENT MAINT - STS	0.00	31.73	141393
	340475	auto-check	001-8050-320.0743	TRUCK MAINT - STS	0.00	147.78	141393
	340569	filters, oil	001-6050-320.0720	VEHICLE MAINTENANCE	0.00	35.54	141393
	340652	air flow sensor	001-6050-320.0720	VEHICLE MAINTENANCE	0.00	85.49	141393
	340734	filter, oil	001-6050-320.0720	VEHICLE MAINTENANCE	0.00	27.59	141393
	340752	brake pads, rotors	001-6040-320.0720	CAR/TRUCK MAINT	0.00	157.62	141393
	340759	hy tran	001-8050-350.1065	SUPPLIES - STS	0.00	429.00	141393
	340768	oil	001-8050-350.1065	SUPPLIES - STS	0.00	689.99	141393
	340769	brake pads, rotors	001-6040-320.0720	CAR/TRUCK MAINT	0.00	169.05	141393

					0.00	1,837.87	
15020 O'REILLY AUTOMOTIVE INC							
	229309	conditioner	003-8330-320.0740	EQUIPMENT MAINT	0.00	12.98	141395
15003 ORMSBY'S COMPUTER SYSTEMS INC							
	38565	support services	001-6040-440.1240	COMP SOFTWARE/OFF EQUIP	0.00	150.00	141396

By check number for check acct 01(GENERAL FUND) and check dates 06/23/21 thru 06/23/21

Vendor	PO Number	Invoice Number	Invoice Description	Account Number	Account Description	PO Amount	Invoice Amount	Check

15058 OTIS ELEVATOR CO		402497	maint service	001-7020-320.0729	ANNEX MAINT	0.00	188.08	141397
		426708	maint service	001-6043-320.0731	CITY HALL IMPROVE/REPAIRS	0.00	234.12	141397
		427813	maint service	001-6043-320.0731	CITY HALL IMPROVE/REPAIRS	0.00	370.16	141397
		428016	maint service	001-7035-320.0727	BLDG & GROUNDS MAINT	0.00	291.06	141397
		NKV17706001	labor	001-7020-320.0729	ANNEX MAINT	0.00	400.00	141397
						-----	-----	
						0.00	1,483.42	
15024 PARKS LOUISE		060921	election	001-5060-100.0110	PERSONNEL SERVICES	0.00	99.88	141398
15022 PERREAULT JOANNE		060921	election	001-5060-100.0110	PERSONNEL SERVICES	0.00	64.63	141399
16003 PIKE INDUSTRIES INC		1134752	asphalt	001-8050-360.1172	BITUMINOUS HOT MIX-ST5	0.00	273.93	141400
16126 PORTER JOSEPH & MEGAN		03918	water overpayment	002-2000-200.0214	REFUND OVERPAYMENT-T/C	0.00	7.32	141401
17010 QUADIENT FINANCE USA INC		31215865	meter postage	001-5010-360.1163	POSTAGE FOR METER	0.00	1,000.00	141402
17004 QUARANTA STEPHANIE L		OE20114	exam	001-7050-340.0944	GLASSES	0.00	155.00	141403
17002 QUILL CORP		17263622	folders,pads,gloves	001-5040-350.1053	OFFICE SUPPLIES/EQUIPMENT	0.00	26.83	141404
		17263622	folders,pads,gloves	001-8020-350.1053	OFFICE SUPPLIES/EQUIPMENT	0.00	53.46	141404
		17263790	toner	001-5050-350.1053	OFFICE SUPPLIES	0.00	17.64	141404
		17263790	toner	002-8200-350.1053	OFFICE SUPPLIES/EQUIPMENT	0.00	8.81	141404
		17263790	toner	003-8300-350.1053	OFFICE SUPPLIES/EQUIPMENT	0.00	8.81	141404
						-----	-----	
						0.00	115.55	
18148 R K MILES		11872	supplies	001-7015-320.0730	POOL & BLD MAINT	0.00	53.16	141405
		11929	sonotubes	001-7015-320.0730	POOL & BLD MAINT	0.00	248.60	141405
		12019	epoxy,lever	003-8330-320.0727	BLDG & GROUNDS MAINT	0.00	90.79	141405
						-----	-----	
						0.00	392.55	
18025 REIL ERICKA		060921	election	001-5060-100.0110	PERSONNEL SERVICES	0.00	14.69	141406
18152 REIL JOE		060921	election	001-5060-100.0110	PERSONNEL SERVICES	0.00	14.69	141407

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City of Barre Accounts Payable
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By check number for check acct 01 (GENERAL FUND) and check dates 06/23/21 thru 06/23/21

Vendor

PO Number	Invoice Number	Invoice Description	Account Number	Account Description	PO Amount	Invoice Amount	Check

18047 RODRIGUEZ LINDA							
	060921	election	001-5060-100.0110	PERSONNEL SERVICES	0.00	64.63	141408
19139 SEVEN DAYS							
	211882	advertise City positions	001-5020-230.0510	ADVERTISING/PRINTING	0.00	433.50	141409
	211882	advertise City positions	003-8330-230.0510	ADVERTISING/PRINTING	0.00	280.50	141409

					0.00	714.00	
19150 SHERWIN WILLIAMS CO							
	0508-5	paint mixer,tarp,duct tap	001-7020-470.1270	MACHINES/EQUIPMENT OUTLAY	0.00	54.93	141410
	0553-1	rollers,frame,ext pole	050-5830-360.1166	2020 \$1.7M BOND EXP POOL	0.00	100.73	141410
	0570-5	strainers,brushes	001-7020-470.1270	MACHINES/EQUIPMENT OUTLAY	0.00	23.15	141410
	0572-1	paint	001-7015-320.0730	POOL & BLD MAINT	0.00	49.26	141410

					0.00	228.07	
19032 SOUP N GREENS							
	053021	lock up meals Apr-May	001-6050-230.0511	LOCK-UP MEALS	0.00	161.02	141411
19071 STOCKWELL SAMN							
	060921	election	001-5060-100.0110	PERSONNEL SERVICES	0.00	14.69	141412
19160 SWISH WHITE RIVER							
	W091308A	credit	002-8200-320.0727	BLDG & GROUNDS MAINT	0.00	-26.50	141413
	W438641	stripper,finish,mophead	001-7035-350.1049	CUSTODIAL SUPPLIES	0.00	266.59	141413

					0.00	240.09	
20002 TIMES ARGUS ASSOC INC							
	8073	advertise reroofing bid	001-7015-350.1053	OFFICE SUPPLIES	0.00	104.00	141414
	8094	advertise Asst Chief Opt	003-8330-230.0510	ADVERTISING/PRINTING	0.00	152.50	141414

					0.00	256.50	
20005 TOWN OF BARRE							
	21172	spring yard waste 2021	001-7015-320.0721	FIELD MAINTENANCE	0.00	1,078.56	141415
21002 UNIFIRST CORP							
	1070001898	uniform rental	003-8300-340.0940	CLOTHING	0.00	29.61	141416
	1070001898	uniform rental	003-8330-320.0743	TRUCK MAINT	0.00	10.60	141416
	1070001898	uniform rental	003-8330-340.0940	CLOTHING	0.00	83.12	141416
	38484	uniform rental	003-8300-340.0940	CLOTHING	0.00	34.46	141416
	38484	uniform rental	003-8330-320.0743	TRUCK MAINT	0.00	10.60	141416
	38484	uniform rental	003-8330-340.0940	CLOTHING	0.00	31.49	141416
	38486	uniform rental	001-7020-340.0940	CLOTHING	0.00	56.32	141416
	38486	uniform rental	001-7030-340.0940	CLOTHING	0.00	50.92	141416
	38486	uniform rental	001-7035-340.0940	CLOTHING	0.00	21.72	141416

By check number for check acct 01(GENERAL FUND) and check dates 06/23/21 thru 06/23/21

Vendor

PO Number	Invoice Number	Invoice Description	Account Number	Account Description	PO Amount	Invoice Amount	Check
	38486	uniform rental	001-7015-340.0940	CLOTHING	0.00	10.58	141416
	38486	uniform rental	001-8500-340.0940	CLOTHING	0.00	21.02	141416
	38487	uniform rental	002-8220-340.0940	CLOTHING	0.00	66.99	141416
	38488	uniform rental	001-8050-320.0743	TRUCK MAINT - STS	0.00	69.00	141416
	38488	uniform rental	001-8050-340.0940	CLOTHING	0.00	210.36	141416
	38488	uniform rental	002-8200-340.0940	CLOTHING	0.00	90.06	141416
	38488	uniform rental	003-8300-340.0940	CLOTHING	0.00	56.19	141416
	4551934	uniform rental	003-8300-340.0940	CLOTHING	0.00	29.60	141416
	4551934	uniform rental	003-8330-320.0743	TRUCK MAINT	0.00	7.50	141416
	4551934	uniform rental	003-8330-340.0940	CLOTHING	0.00	83.13	141416
	4553898	uniform rental	003-8300-340.0940	CLOTHING	0.00	29.60	141416
	4553898	uniform rental	003-8330-320.0743	TRUCK MAINT	0.00	10.30	141416
	4553898	uniform rental	003-8330-340.0940	CLOTHING	0.00	83.13	141416
	4555832	uniform rental	003-8300-340.0940	CLOTHING	0.00	29.60	141416
	4555832	uniform rental	003-8330-320.0743	TRUCK MAINT	0.00	10.30	141416
	4555832	uniform rental	003-8330-340.0940	CLOTHING	0.00	83.13	141416
					0.00	1,219.33	
22127	VERMONT STATE TREASURER						
	061721	duplicate pymt Inv 348	001-1000-120.0140	ACCOUNTS RECEIVABLE	0.00	4,036.22	141419
22011	VIKING-CIVES USA						
	4507404	gutter brooms	001-8050-320.0740	EQUIPMENT MAINT - STS	0.00	266.98	141420
	4507406	intake head,flap,piston	001-8050-320.0740	EQUIPMENT MAINT - STS	0.00	2,136.60	141420
					0.00	2,403.58	
22120	VT GRANITE MUSEUM OF BARRE INC						
	061521	reimb prop tax leased lan	001-9130-360.1201	GRANITE MUSEUM PARK LOT	0.00	2,297.58	141421
23094	WALZ LESLIE						
	060921	election	001-5060-100.0110	PERSONNEL SERVICES	0.00	52.88	141422
23095	WALZ TOM						
	060921	election	001-5060-100.0110	PERSONNEL SERVICES	0.00	52.88	141423
23002	WASZAZAK EDWARD						
	060921	election	001-5060-100.0110	PERSONNEL SERVICES	0.00	14.69	141424
23104	WENTWORTH LINDA						
	060921	election	001-5060-100.0110	PERSONNEL SERVICES	0.00	64.63	141425

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City of Barre Accounts Payable
Warrant/Invoice Report # 21-51

By check number for check acct 01 (GENERAL FUND) and check dates 06/23/21 thru 06/23/21

Vendor	PO	Invoice	Invoice	Account	Account	PO	Invoice	
	Number	Number	Description	Number	Description	Amount	Amount	Check

Report Total

250,803.13
=====

To the Treasurer of City of Barre, We Hereby certify
that there is due to the several persons whose names are
listed hereon the sum against each name and that there
are good and sufficient vouchers supporting the payments
aggregating \$ ***250,803.13
Let this be your order for the payments of these amounts.

THANKS!

Hallmark

MADE WITH PAPER FROM
WELL-MANAGED FORESTS

Dear Barre Police Department,

My family and I wanted to thank you from the bottom of our hearts for keeping our motel safe. Thanks to your presence, we feel like we have you protecting our community and keeping us out of harm's way. Please accept this small donation.

Praying for your safety and well being every day.

- The Hollow Inn and Patel family 😊



Barre City Police Department

Chief Timothy J. Bombardier


15 Fourth Street, Suite 2
Barre, Vermont 05641-4476

www.barrecity.org

Tel: 802-476-6613
Fax: 802-476-0249

Larry E. Eastman, Jr.
Deputy Chief of Police

To: Mayor Lucas Herring
City of Barre Council Members
Steven E Mackenzie, P.E., City Manager

From: Chief Timothy J. Bombardier 

Date: June 15, 2021

Re: Acceptance of Gift from Hollow Inn

As discussed on 06/10/21 at the special Council meeting at Alumni Hall, the Barre City Police Department has received a gift of \$1,000, from the owners of the Hollow Inn. (Note attached)

If approved by Council, it would be my intent to utilize this money to continue with the annual Community picnic that we have held in Currier Park at the end of the summer. The Community Picnic has long been an event to look forward to at the end of the Summer and has been one that has brought the Community together.

I recommend that we accept this gift and utilize it for the above purpose.

**Barre City Fire Department
Office of the Fire Chief
15 Fourth Street
Barre, Vermont 05641
802-476-0254**

To: Mayor Lucas Herring, Members of the Barre City Council

From: Douglas S. Brent, Chief of Fire and EMS *DS Brent*

Date: June 17, 2021

Re: Hollow Inn Donation

As outlined at our recent City Council/City Staff workshop retreat, the Police Department and the Fire Department *EACH* received a donation from the Patel Family at the Hollow Inn. It is quite a sizable donation, \$1000.00. It was very thoughtful and acknowledges our hard work during the Pandemic. As I explained, we often receive donations from memorial services in lieu of flowers when someone passes away. These are usually a lot smaller in amount and we put them into a fund overseen by Dawn, the Director of Finance. Every donation is acknowledged by me with a personalized thank you note from our department. We use these funds for special items not normally covered in the budget. An example might be a new tool or device or a piece of equipment for the ambulance.

Per City policy, as discussed, the purpose of this letter is to ask the City Council to allow us to accept this very generous donation. If OK'd, I will follow-up by sending a Thank You. Please let me know if you have any questions.



City of Barre, Vermont

"Granite Center of the World"

**ACTION ITEM BRIEFING MEMO
CITY COUNCIL AGENDA ITEM
CITY COUNCIL AGENDA: 06-22-21**

Consent Item No.: 3E **Discussion Item No.** **Action Item No.**

AGENDA ITEM DESCRIPTION: Authorize Purchase of City Hall Alertus Security Software/Hardware

SUBJECT:

SUBMITTING DEPARTMENT/PERSON: Rikk Taft HR Administrator/IT/Safety Officer

STAFF RECCOMENDATION: Approval

STRATEGIC OUTCOME/PRIOR ACTION: Improve the safety and security within City Hall. This is phase 1 of a 2 part plan that will improve the overall safety and security of staff working in City Hall, BCS and Fire. No Prior action has been taken on this item.

EXPENDITURE REQUIRED: \$11,427.00

FUNDING SOURCE(S): Budgeted in the FY21 budget under general administration for the amount of \$3987.00

LEGAL AUTHORITY/REQUIREMENTS: Budgeted in the FY21 budget
City of Barre, Procurement Policy

BACKGROUND/SUPPLEMENTAL INFORMATION: See Attached memo

LINK(S):

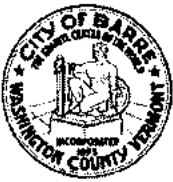
- <https://www.alertus.com/desktop>
- <https://www.alertus.com/panicbutton>
- <https://www.alertus.com/alertbeacon>

ATTACHMENTS: Alertus Product Quote.
Breakout of expenses by one time purchase and Annual expenses
Implementation Memo

INTERESTED/AFFECTED PARTIES: All City Staff with access to the City network

PSB Dispatch

RECOMMENDED ACTION/MOTION: Authorize of the City Manager to move forward with the purchase Alertus software.



City of Barre, Vermont

"Granite Center of the World"

6 N. Main St., Suite 2
Barre, VT 05641
Telephone (802) 476-0240

To: Mayor and City Council

From: Human Resources Administrator/IT/Safety and Security

Date: June 18, 2021

Mr. Mayor and Councilors,

The intention of the City with the implementation of the Alertus Desktop notification system is to improve the security of City Hall and Alumni Hall staff and residents.

The City hired a safety and security consultant to come into City Hall to help us identify the areas of concern.

Some of the key points that were highlighted in the security audit are as follows.

- Collection of money (Taxes, Water and Sewer Payments, etc.) makes us a target for robbery
- Lack of a mass notification system in the event of a hostile individual or active shooter scenario.
- Lack of security cameras
- No instant notification to the Police, Fire and EMS.
- Easy open access to staff in the offices.

Over time I have received many comments from staff at all levels, concerning the lack of security and their fear for personal safety.

With the implementation of the Alertus Software we will be solving the following areas of concern identified by in the Security Audit and by our Staff.

- Ability to do a mass notification
- Ability of staff to call for assistance silently without amplifying the situation.
- Police Fire and EMS instant notification.
- Ability of staff to know that there is a problem in a particular area of the building. This affords the staff that are not in the problem area to exit the building to safety.

I will be in attendance at the meeting to answer questions but, it my hope that the City Council will support our initiative to make City staff feel safer.

ONE TIME FEES

Product Code		Quantity	Unit Price	Total Price
ANS-S	Enterprise Wide license of Alertus Software	1	\$ 2,470.00	\$ 2,470.00
AND-X	Alertus Desktop Notification License	1	\$ 1,700.00	\$ 1,700.00
ALR-USB	USB Panic Buttons	11	\$ 210.00	\$ 2,310.00
PRO-IMP	Implementation Services	1	\$ 500.00	\$ 500.00
AAB-W-YL	WIFI Alert Beacon	1	\$ 997.00	\$ 997.00

\$ 7,977.00

ANNUAL FEES

Product Code		Quantity	Unit Price	Total Price
ENS- S	Alertus Premier Licensing and support Agreement	1	\$ 3,450.00	\$ 3,450.00
				\$ 3,450.00

Total Cost for year 1			\$ 11,427.00
Total Cost for year 2			\$ 3,450.00



Prepared By Aaron Grau
 Email agrau@alertus.com
 Created Date 5/28/2021
 Expiration Date 6/30/2021
 Quote Number 00138239

Bill To Name City of Barre
 Bill To 6 N Main St Ste 2
 Barre, VT 05641-4177
 USA

Ship To Name City of Barre
 Ship To 6 N Main St Ste 2
 Barre, VT 05641-4177
 USA

Product Code	Product	Product Description	Line Item Description	Quantity	Sales Price	Total Price
ANS-S	Alertus Notification System - Small	enterprise-wide license of Alertus Server Software and Activation Console (GUI) for alert origination. Includes setup and configuration.		1.00	\$2,470.00	\$2,470.00
ENS-S	Enhanced Notification Licensing & Support - Small	Alertus Premier Licensing and Support Agreement *12 Month Annual Fee	annual support	1.00	\$3,450.00	\$3,450.00
ADN-X	Alertus Desktop Notification License			1.00	\$1,700.00	\$1,700.00
ALR-USB	Emergency Panic Button - USB Connected	USB Panic Button - standard compact desk model (black w/red button)		11.00	\$210.00	\$2,310.00
PRO-IMP	Implementation Services	Implementation services to support Alertus System deployment, integration, and implementation activities. On-site services are not included.		1.00	\$500.00	\$500.00
AAB-W-YL	Alert Beacon, Wi-Fi/Ethernet/PoE, yellow	Wi-Fi Alert Beacon. Includes wall mounting bracket. Backup batteries and power supplies, if needed, are sold separately.		1.00	\$997.00	\$997.00
20155	Alert Beacon Power Supply AC	24V 1A AC/DC Power Supply, barrel plug Provided for use with Wifi or Paging capable Alert Beacons and LED Marquees		1.00	\$20.00	\$20.00
AUD-IPAVA	IP-AVA TTS Paging Integration	IP-AVA interface module for connecting to PA/Speakers, Fire Alarm Evac, and Outdoor Giant Voice speaker arrays. Ethernet/PoE. Power adapter available separately for non-PoE installations		1.00	\$3,950.00	\$3,950.00
HPSA-AUD	Audio Equipment Hardware			1.00	\$0.00	\$0.00
AUD-IPS-W	IP Text-to-Speech Speaker Wifi	Speaker 5W, Wifi, indoor, white, only works on 2.4 GHz, 24VDC power supply included (include completed TTS configuration form with PO)		1.00	\$1,380.00	\$1,380.00

Subtotal \$16,777.00
 Total Price \$16,777.00
 Grand Total \$16,777.00

US Dollars (USD)



Additional Notes

Terms & Conditions

1 Product and Service. Buyer agrees to pay the total amount in the above quotation/selected price plan or accompanying purchase order upon execution of this agreement, and in exchange, Alertus agrees to provide the deliverables. Alertus usually delivers orders for product and services in the sequence purchase orders are received. Alertus will not be liable for late delivery of product or service.

2 Order Policy. Orders for product or service must be in writing, and are not binding until accepted by Alertus in writing. Alertus may reject any order in its sole discretion. Acceptance of any order by Alertus is expressly limited to and made conditional upon the Terms and Conditions in the contract.

3 Taxes. Buyer agrees to inform Alertus if it does not hold sales tax exemption certificate. Buyer agrees to identify and remit all sales or use taxes directly to collection authorities. Buyer agrees to pay any and all import tariffs and taxes.

4 Installation. If ordered at separate charge, Alertus will install product for Buyer. Alertus products and services operate in conjunction with Buyers communications services and equipment. Buyer is responsible for determining the suitability of the product purchased from Alertus both for use with Buyers communication services and equipment and for the intended application.

5 Software. Buyer agrees that title to any software or other copyrighted materials provided to Buyer does not pass to Buyer upon sale and remains with Alertus or its licensors. Buyer agrees to use any software or other copyrighted materials provided subject to and in compliance with copyright law and any applicable license provisions. Buyer may install the server software on one server only, unless otherwise authorized by Alertus. Buyer is permitted to grant access to the frontend graphical user interface to as many staff as designated to activate system. Buyer agrees not to add, modify, or erase firmware software embedded on Alertus hardware appliances at any time, except if expressly authorized by Alertus.

6 Shipment. Buyer agrees to inspect the any shipped product and notify Alertus in writing of any damage within thirty (30) days after receipt of product. If Buyer does not notify Alertus in writing within thirty days, neither Alertus nor the transport company will be liable to Buyer for any damages arising out of or related to the shipment of product.

7 Warranty. (a) Alertus warrants that product manufactured or services rendered by Alertus will be free from defects in material or workmanship for a standard two years after delivery to Buyer. Product defects caused by misuse, mishandling, abuse, neglect, willful physical damage, vandalism, or placement in contraindicated conditions or environments are excluded from this warranty. If notified of the defect within the warranty period, Alertus will repair or replace at its option defective product or service. Buyer must obtain authorization from Alertus prior to returning product to Alertus. Product returned to Alertus without authorization will not be accepted. (b) Product not manufactured by Alertus is covered only by the manufacturer's warranty accompanying product delivered.

8 Repair. Repair service after expiration of the warranty for product is available from Alertus. Product returned to Alertus must be sent shipment prepaid, and Buyer must obtain authorization prior to returning product. Alertus will repair product on a time and materials basis. Buyer agrees to pay for the return cost of shipping repaired product to Buyer.

9 Transferability; Resale. Buyer agrees not to distribute, transfer, resell, or transmit any Alertus products, software, technical information, or business plan/strategic information to any third party without express written permission from Alertus. Buyer agrees not to commercially compete with Alertus or facilitate another party's ability to commercially compete with Alertus.

10 Limitation of Liability. IN NO EVENT WILL ALERTUS BE LIABLE TO BUYER IN CONTRACT, TORT, WARRANTY, OR OTHERWISE FOR THE COST OF SUBSTITUTE GOODS OR ANY INDIRECT, INCIDENTAL, SPECIAL, OR CONSEQUENTIAL DAMAGES, ARISING OUT OF OR RELATED TO THE GOODS OR SERVICE, EVEN IF ALERTUS HAS BEEN ADVISED OF THE POSSIBILITY OF SUCH DAMAGES. IF ANY DISCLAIMER OF WARRANTY OR LIMITATION OF REMEDY IS HELD UNLAWFUL OR INAPPLICABLE, OR TO HAVE FAILED ITS ESSENTIAL PURPOSE, LIABILITY WILL BE LIMITED TO THE AMOUNT PAID BY BUYER FOR THE SPECIFIC GOODS OR SERVICE ON WHICH THE CLAIM IS BASED. UPON TAKING POSSESSION AT DELIVERY, BUYER ACCEPTS ALL LIABILITY THAT MAY ARISE FROM BUYERS USE OR MISUSE OF ALERTUS PRODUCTS AND SERVICES. IN NO EVENT WILL ALERTUS BE LIABLE FOR DAMAGE TO PERSON OR PROPERTY BECAUSE OF THE COMPLETE OR PARTIAL FAILURE OF ITS PRODUCT TO OPERATE.

11 Regulations. Buyer shall comply at its own expense with all applicable laws, ordinances, regulations, and codes. Buyer acknowledges and accepts full responsibility for complying with all laws and regulations when operating product, including those of the Federal Communications Commission.

12 Forum and Controlling Law. Buyer agrees that any claim or dispute against Alertus must be resolved in a court located in Maryland, and Buyer agrees to submit to the personal jurisdiction of such courts for the purpose of litigating any claim or dispute. Maryland law will govern litigation of any claim or dispute.

13 Nondisclosure. Information disclosed pursuant to this agreement shall be used solely for the purpose of implementing and operating the product. Buyer agrees to hold the information in confidence, to use the information only for the purpose of implementing and operating the product, and not to disclose the information to any third party without express written consent from Alertus to the extent permitted by public records laws.

14 General. No failure or delay in exercising any provision of this contract will be construed as a waiver or release of any contract right. The contract is binding upon the assigns, executors, administrators, and other legal representatives of the parties. No modification of this contract will be effective unless signed by the Chief Executive Officer of Alertus. Buyer is entering into this agreement without reliance upon any statement, representation, promise, inducement, or agreement not expressly contained herein. This agreement Buyers purchase order constitutes the entire agreement between the parties. Buyer represents and warrants that the person signing this offer on Buyers behalf is authorized to bind Buyer in contract.



Accepted by "Buyer":

Signature: _____

Name: _____

Accepted by Alertus Technologies, LLC

Signature: _____

Name: _____

Date: _____

Title: _____

Date: _____

Title: _____



City of Barre, Vermont

“Granite Center of the World”

**ACTION ITEM BRIEFING MEMO
CITY COUNCIL AGENDA ITEM
CITY COUNCIL AGENDA: 06-22-21**

Consent Item No.: 3.F. **Discussion Item No.** _____ **Action Item No.** _____

AGENDA ITEM DESCRIPTION:

Selection of Re-Appraisal Contractor

SUBJECT:

Council approval of Re-Appraisal Contractor Recommendation.

SUBMITTING DEPARTMENT/PERSON:

Janet Shatney, Acting Assessor

STAFF RECCOMENDATION:

NEMC (New England Municipal Consultants, Ltd)

STRATEGIC OUTCOME/PRIOR ACTION:

To ensure the entire City of Barre has been reappraised.

EXPENDITURE REQUIRED:

Proposed cost of reappraisal \$295,000. Annual Support/License Fee \$3,000.

FUNDING SOURCE(S):

Each town receives \$8.50 per parcel per year from their equalization and reappraisal account within the education fund. At this point, our fund balance for reappraisal costs is +/- \$393,970.

LEGAL AUTHORITY/REQUIREMENTS:

At this time, we have not been instructed that a reappraisal is necessary, our last one was completed in 2006. Of the 4 types of reappraisals allowed, 2006 was a Partial Reappraisal. The 200+ properties that were not evaluated during the 2002 reappraisal were revalued, and that percentage change was then applied to every property in the city.

This will be a complete reappraisal, of which PV&R (Property Valuation & Review) is already aware, and is pleased we are having one completed.

BACKGROUND/SUPPLEMENTAL INFORMATION:

Attached to this memo are the two submittals that were received, reviewed by the review team of myself and Carol Dawes, City Clerk/Treasurer.

We reviewed the two submittals individually, then met to discuss our concerns and questions. Tyler Technologies' submittal was, in our opinion, not detailed enough, and too broad. With that list created, only NEMC was sent our questions which they answered very quickly. We then met once more to review those responses, and both agreed our choice for recommendation was NEMC, and not Tyler Technologies, and we notified the City Manager of our opinion.

Of note is NEMC is a locally based reappraisal firm, with their office in Lyndon Center, VT. Their submittal states that given their workload, our reappraisal would not be done until the 2024 timeframe, and we are ok with that.

Comparison highlights:

Tyler Technologies	New England Municipal Consultants, Ltd.
<i>Out of state firm</i>	<i>Vermont based firm</i>
<i>Continue using the ProVal Assessment software</i>	<i>Change to new assessing software called AssessPro</i>
<i>Completing City of South Burlington as well as City of Burlington's reappraisals currently</i>	<i>Completing Montpelier and Ludlow now; would be doing ours and Coventry for the 2024 assessing year</i>
<i>Has not worked for any other VT municipality other than above</i>	<i>Has completed and continues to work in multiple VT municipalities</i>
<i>At least \$338,800</i>	<i>+/- \$300,000 see expenditures above</i>

LINK(S):

Not applicable.

ATTACHMENTS:

- Tyler Technologies 2021 City-Wide Reappraisal Submittal (partial – does not include the company's 19 pages of their 2019 Annual Report);*
- New England Municipal Consultants Response to RFP*

INTERESTED/AFFECTED PARTIES:

Barre City taxpayers, Assessor's office, Clerk's office, City Manager, City Council.

RECOMMENDED ACTION/MOTION:

Approve award to New England Municipal Consultants, Ltd. to secure a reappraisal contract between the City of Barre and them, and to authorize the Manager to negotiate and sign the final contract.



City of Barre

2021 City-Wide Reappraisal

March 24, 2021

Bob Marshall - Senior Account Executive
One Tyler Way, Moraine, OH 45439
Phone: 800-800-2581 ext. 1506
Email: Bob.Marshall@tylertech.com





March 24, 2021

One Tyler Way
Moraine, Ohio 45439

P: 800.800.2581
F: 937.278.3711

www.tylertech.com

Ms. Janet Shatney
Planning Director
Planning, Permitting and Assessing Services
6 North Main Street
Suite 7
Barre, Vermont 05641

Re: Request for Proposals for 2021 City-Wide Reappraisal,

Dear Ms. Shatney:

Thank you for the opportunity to submit a proposal to provide the City of Barre with the above referenced services. Tyler Technologies, Inc., CLT Appraisal Services™ will provide the revaluation services in accordance with our proposal, the specifications set forth by the City and the guidelines determined by the State of Vermont, as they currently exist.

Our very experienced appraisal staff, led by Derek Arnold, Blane Bowlin and Monique Newcomb, has extensive experience on many CAMA systems throughout Vermont and New England and is prepared to use the City's current CAMA system. We will work closely with the Assessor's office throughout all phases of the process, including training, thereby providing for a smooth transition of the project.

Tyler's locally based appraisal staff is second to none in providing many successful, quality revaluations throughout the State of Vermont. Tyler will meet or exceed IAAO standards and will deliver detailed analytical documentation, as it relates specifically to the City of Barre, assuring the City that the proposed valuations will be well supported and that the taxpayer dollars are well spent.

Thank you for considering Tyler and we look forward to discussing the significant advantages our experienced appraisal team has to offer the City of Barre. Bob Marshall will be Tyler's primary contact for this procurement; he can be reached by phone at 800-800-2581 x1506 or by email at bob.marshall@tylertech.com.

This proposal is effective for 90 days from submission.

Sincerely,

A handwritten signature in blue ink that reads "Gus Tenhundfeld".

Gus Tenhundfeld

Inside Sales Manager

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Executive Summary

The City of Barre has many factors to consider when making the important decision regarding the qualified company you will partner with on your 2021 City-Wide Reappraisal. The chosen partner's mass appraisal qualifications, the quality of the appraisal personnel to staff the project, and a sound approach for completing the project on time should be primary considerations. In the current economic environment it is equally important to assess the financial stability of the partner and the likelihood they will see the project through to completion and be available to assist the City of Barre in the future on an as needed basis.

The past performance of Tyler Technologies' CLT Appraisal Services is a strong indicator of our strengths. Our exclusive focus on the public sector has allowed Tyler to establish an operating model that has positioned our organization as the clear leader in this space. Because Tyler Technologies is a publicly held company (NYSE: TYL), our prospective clients can leverage regulations as set forth by the SEC to further evaluate our current financial position. We believe it is important to the City of Barre to have assurances that the work will occur uninterrupted.

Company Advantages and Strengths

Leadership: Tyler's CLT Appraisal Services is the nation's only national mass appraisal company and has been appraising properties since 1938. We have specific, local experience in the northeast and a large staff of qualified individuals available for assignment, led by Jake Wilson, VP & GM of Appraisal Services and Mark Folkerts, Vice President of Appraisal Operations. Tyler has led the development of computer-assisted mass appraisal (CAMA) and has been innovating approaches since the 1960s. Tyler's CLT Appraisal Services has completed more than 2,500 appraisal projects in 46 states.

Investment: Tyler follows responsible bidding practices. We respond to your requests, analyze the specifications of your project, and take into consideration the services you need to succeed and avoid unexpected expenses. You can be assured that we will deliver a product and values that you can stand behind when talking with property owners and community leadership.

Partnership: Tyler is here for the long term – a strong, lasting partner. Our company is financially sound. We encourage you to compare the financial backgrounds of our competitors and ourselves. You will find that we are well managed with solid principles and we have the resources to deliver what we promise. We have broad experience in communicating with the public and will help you explain the appraisal process.

Professionalism: We work hard for our clients and hold ourselves to high standards of quality and professionalism. We understand how to appraise and defend the values of complex and unusual properties. Our results are measured against the International Association of Assessing Officers (IAAO) and local standards. The results are documented in reports that are compliant with all state and local requirements, as well as Uniform Standards of Professional Appraisal Practice (USPAP) requirements where appropriate.

Contact Persons

We welcome your questions and comments. Please don't hesitate to contact us for information before, during or after your reassessment project.

Derek Arnold

Regional Manager

440-339-5876

E-mail: derek.arnold@tylertech.com

Paul Miller

Eastern Regional Sales Lead

610-246-6539

Email: paul.miller@tylertech.com

Robert N. Marshall

Senior Account Executive

800-800-2581 ext. 1506

E-mail: bob.marshall@tylertech.com

Tyler Technologies, Inc., CLT Appraisal Services

One Tyler Way

Moraine, OH 45439

800-800-2581

Fax: 866-658-4258

Company Background

In 1938, the Cole Layer Trumble Company began serving the appraisal market. During its long history, Cole Layer Trumble established itself as a leader in appraisal services. In 1999, Tyler Technologies, Inc. (Tyler) acquired Cole Layer Trumble. The combined strengths of these two great companies formed Tyler's CLT Appraisal Services, headquartered in Moraine, Ohio. Our success is due to providing products that work. We have continually refined our appraisal techniques. We pioneered the application of computer-assisted mass appraisal (CAMA). Our sound appraisal practices and knowledge of developing computer systems has enabled us to become a leading provider of appraisal and tax software and services.

Tyler's CLT Appraisal Services is known for dependability in completing projects on time and within budget. We are recognized for our expertise in areas such as property valuation modeling and analysis. Our team of professionals understands the challenges clients face when communicating with leadership, other agencies and the public. Tyler stands out from our competitors because we are able to work with clients to develop successful communication strategies. Our appraisal and tax subject matter experts stay up-to-date on changing legislation and practices through training and professional associations. Our staff of over 300 professionals includes certified appraisers who are completely familiar with the regions in which we work.

Tyler Technologies (NYSE: TYL) is a leading provider of end-to-end information management solutions and services for local governments. Tyler partners with clients to empower the public sector — cities, counties, schools and other government entities — to become more efficient, more accessible and more responsive to the needs of their constituents. Tyler's client base includes more than 15,000 local government offices in all 50 states, Canada, the Caribbean, the United Kingdom and other international locations. In 2017, Forbes ranked Tyler on its "Most Innovative Growth Companies" list, and it has also named Tyler one of "America's Best Small Companies" eight times. The company has been included six times on the Barron's 400 Index, a measure of the most promising companies in America. More information about Tyler Technologies, headquartered in Plano, Texas, can be found at www.tylertech.com.

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Audited Financial Statements

Please refer to the 2019 Annual Report included in the Appendix.

Proposed Personnel

Tyler has built a strong and capable staff through recent projects completed throughout the Northeast. This staff is made up of talented and driven appraisal professionals trained to perform the necessary tasks in this difficult business. We are committed to very strong appraisal leadership who will work in conjunction with the Project Management team in all facets of this project, to ensure an on time completion of the City of Barre's Reappraisal.

Our proposed Project Manager is Blane Bowlin. The following pages contain the detailed resumes of our proposed team.

Blane Bowlin, Appraisal Associate Project Supervisor

Summary I am a Project Manager with 19 years of experience. I have worked on 46 projects in 12 states which has enabled me to implement effective management strategies to ensure timely completion of projects, budgetary goals, and expectations while maintaining effective communication with the client and company staff.

Project Experience Most notable projects would be the City of Detroit which was comprised of 462,000 parcels and two budgets totaling 9 million dollars and Knox County, IN which had a 1 million dollar budget set up at 70% cost to fee, I ran the budget at 60% cost to fee which saved/made \$100,000 for the company.

Work Experience 2005 to present **Project Manager**

- Oversaw and assisted 44 projects for 13-14 years
- Responsible for implementing, maintaining project plan
- Responsible for implementing and maintaining project budget
- Responsible for hiring and training project staff
- Responsible for client relations
- Responsible for public relations and education
- Maintained a *cost to fee* lower than budgeted by 5% to 10%
- Ensured timely completion of project and client goals.

Sales (very brief period of 1-2 months)

- Responsible for 23 counties in the state of Indiana
- Secured 4 projects
- Wrote contracts based on the scope of services
- Prepared project budget
- Prepared project work plan
- Communicated with Sales Manager and Regional Manager

2001 – 2005 **Residential/Commercial Lister**

- Responsible for accurate data collection for residential/commercial/industrial properties.
- Responsible for maintaining personal/project production logs.
- Consistently outperformed the expectations set forth by project management.
- Responsible for data entry for residential/commercial/industrial properties.
- Responsible for maintaining public, client, and project staff relations.

Education 1979 – 1983 Mishawaka High School
2005 IAAO 101 – Fundamentals of Real Property Appraisal

2005 MAAO Course 5 – Mass Appraisal of Real Property
2009 IAAO 400 – Assessment Administration
2006 IAAO 102 – Income Approach to Valuation
2011 IAAO 171 – IAAO Standards of Professional Practice & Ethics
2012 IAAO 300 – Fundamentals of Mass Appraisal
IAAO Workshop 171 – IAAO Standards of Professional Practice and Ethics
MAAO Course 5 – Mass Appraisal of Real Property
Appraisal Institute Course OL-410 – USPAP (15 hours)
Numerous IAAO one (1) day forum classes offered and taken while attending
the Indiana Assessor Conferences twice a year since 2009

Skills

- Project Management skills
- Communication skills
- Microsoft Office Suite skills
- Budget building and management skills
- Strategic Planning
- Training skills
- Time management
- Leadership skills
- Developing policies and procedures

Monique Newcomb – Senior Appraisal Project Manager

Summary A seasoned mass appraisal professional, Monique joined Tyler in 2017 as a Senior Appraisal Project Manager. In the revaluation field since 2002, she has many years of experience in the appraisal industry working directly with customers to produce accurate valuation of properties throughout New England. Strong project management, valuation, and analysis experience. A strong team player that takes the lead to drive results when needed, great verbal and written communication and interpersonal skills. Able to approach problems effectively, prioritize objectives and deliver on complex workloads.

Project Experience Andover, Coventry, Danbury, Ellington, East Haddam, Franklin, Glastonbury, Griswold, Haddam, Killingly, Lisbon, Madison, Montville, Plainfield, Putnam, Sprague, Essex, Manchester, Marlborough, Redding, Rocky Hill, Suffield, Sterling, Westport, Wethersfield and, Windsor Locks CT, Jamestown, Johnston, Middletown, and Smithfield, RI, Pittsford, VT

Work Experience Senior Appraisal Project Manager
Oversees, plans, budgets, documents, and ensures scope of contract is fulfilled in the appropriate timeline. Responsible for all analysis work and ratio testing ensuring they are within state standards. Assisting Implementation Department with conversion requirements. Establish all rates and tables within the CAMA system. Work with client to deliver a product that is tailored to their needs.

Project Manager/Vision Government Solutions
Oversees, plans, budgets, documents, and ensures scope of contract is fulfilled in the appropriate timeline. Responsible for all analysis work and ratio testing ensuring they are within state standards. Assisting Implementation Department with conversion requirements. Establish all rates and tables within the CAMA system. Work with client to deliver a product that is tailored to their needs.

Project Manager/Data Collection Manager/Vision Government Solutions
Oversees, plans, budgets, documents, and ensures scope of contract is fulfilled in the appropriate timeline. Responsible for all analysis work and ratio testing ensuring they are within state standards. Assisting Implementation Department with conversion requirements. Manage, train, develop, hire Crew Chiefs and Data Collectors. Responsible for allocation and proper staffing of Crew Chiefs and Data Collectors. Create and maintain Data Collection manuals, policies, production reports, incentive program and researching and acquiring equipment for Data Collectors.

Senior Staff Appraiser/Data Collection Manager/Vision Government Solutions
Performing analysis, reviewing, and validating sales. Establishing land and building rates and applying them to the CAMA system. Defining and editing all tables including cost models, building size adjustments, depreciation schedules, land curves and Neighborhood adjustments. Manage, train, develop, hire Crew Chiefs and Data Collectors. Responsible for allocation and proper staffing of Crew Chiefs and Data Collectors. Create and maintain Data Collection manuals, policies, production reports, incentive program and researching and acquiring equipment.

Staff Appraiser/Vision Government Solutions
Performing field review and applying valuation parameters. Utilize the CAMA system, Excel to produce reports and modify database. Conduct informal hearings, investigating discrepancies reported by the taxpayer.

Crew Chief/Vision Government Solutions

Responsible for overseeing data collection efforts, quality control, efficiency and maintain accounting of project progress. Providing training and performing complex data collection as needed. Develop and maintain positive relations with the client, the public and company personnel

Data Collector/Vision Government Solutions

Accurately measure, sketch, and inspect residential properties. Interact effectively and professionally with taxpayers.

Education

Appraisal Institute

403G-General Appraisal Income Approach (part1)

Connecticut Assessor School

C.C.M.A. Course 1A

C.C.M.A. Course 1B

C.C.M.A. Course 4

C.C.M.A Workshop -2018

Massachusetts Association of Assessing Officers

Course 3- Income Approach

University of Connecticut

Appraisal One-Residential Appraisal

Appraisal Two-Commercial Appraisal

International Association of Assessing Officers

101-Fundamentals of Real Property Appraisal

102-Income Approach to Value

201-Appraisal of Land

Webinar-Spatial Modeling

Webinar-Rise of the Machines-Drone Technology

Forum 911-Contaminated Properties

NBREA

USPAP-15 Hours

NRAAO Conference

Unique and Challenging Homes

Rhode Island Association of Assessing Officers

Commercial Valuation and Special Properties

Certifications

Connecticut Office of Policy and Management

Project Management Certification Certificate No. 871

Commercial Certification

Land/Residential Certification

State of Delaware

Certified Assessor License No. X6-00000256

State of New Hampshire Department of revenue Administration

DRA-Certified Property Assessor Assistant

State of Vermont Department of Taxes

Project Supervisor

Skills

CAMA Systems

Equality, Vision 6.4, Vision 6.5, Vision 7, Vision 8, iasWorld, Unifers

Jon Lawson, Sr. Appraisal Technical Analyst

Summary: Jon joined Tyler in 2009 as an appraisal residential reviewer and progressed into what became a new role within the company as an appraisal analyst. He has developed many reports and databases to assist the appraisal project managers. He is always looking for a way to efficiently streamline any process within the daily operations. Due to a need for more technical support in the appraisal division, Jon is now part of a newly created technical appraisal team.

Project Experience: Indiana: Bartholomew, Clay, Crawford, Dearborn, Dubois, Fountain, Gibson, Greene, Jackson, Jefferson, Jennings, Johnson, Knox, LaPorte, Madison, Owen, Parke, Perry, Posey, Ripley, Scott, Spencer, Sullivan, Switzerland, Tippecanoe, Vermillion, Warrick, Washington, White
 South Carolina: Oconee County
 Connecticut: Greenwich
 Michigan: Detroit, Hamtramck
 Colorado: Denver (Implementing Market Modeling)
 Georgia: Fulton County
 Canada: British Columbia (Implementing Market Modeling)
 New York: Greenbrough (Market Modeling)

Work Experience: Data Analyst
 Assisted with various projects extracting and analyzing data then reporting back findings via spreadsheets, graphs, and/or maps.
 Market Modeling
 Successfully setup and implemented market modeling within IAS for Denver Colorado, Fulton County Georgia, Greenbrough New York, and a pilot in British Columbia Canada.
 Project Manager-Dubois Co, Indiana
 Two years of successfully running the Appraisal services project for Dubois Co, Indiana. This included overseeing and training employees
 Project Manager-Posey Co, Indiana
 Two years of successfully running the appraisal services project for Posey Co, Indiana. This included training multiple client personnel

Education: University of Southern Indiana: Bachelor of Science in Accounting and Professional Services
 Certified Indiana Assessor Appraiser – Level III
 IAAO 101, IAAO 102, IAAO 300, IAAO 331, IAAO 332, IAAO 400, USPAP

Skills: Knowledgeable in Microsoft Office
 Adequate in SQL
 Adequate in Oracle
 Skilled with below CAMA system
 IAS
 Proval
 Xsoft
 BSA
 Conversant in ArcGIS
 Acquainted with Crystal Reports

David Boast – Commercial Reviewer

Summary A commercial review professional with 35 years of experience, David joined Tyler in 2009 as residential, commercial data collector and quickly ascended to team leader. He has work all over the Northeast for many states and towns. David has dedicated his career to customer service and enjoys using his knowledge and expertise to ensure a positive, productive experience with Tyler’s clients.

Work Experience **Residential & Commercial Data Collection Review, Hearings Connecticut:** Towns of: Ashford, Canterbury, Eastford, Franklin, Groton, Killingly, Plainfield, Putnam, Sprague, Sterling, Bozrah, Windham, Windsor Locks, Farmington, Madison, Thompson.
Residential & Commercial Data Collection Review, Hearings New York: Rhinebeck, Westchester, Scarsdale, Rye, Ossining
Residential & Commercial Data Collection Review, Hearings Massachusetts: Pittsfield, North Hampton, Peabody
Residential & Commercial Data Collection, Review Vermont: Burlington, South Burlington
Residential & Commercial Data Collection Pennsylvania Lancaster, Monroe, Philadelphia, West Chester

- Education**
- GED
 - Principals & Practices of Real Estate
 - I.A.A.O 101 – Fundamentals of Real Property Appraisal
 - I.A.A.O 102 – Income Approach to Valuation
 - USPAP 15 Hour
 - Various appraisal courses yearly for continuing education

- Skills**
- CT Land/Residential & Commercial/Industrial Certificate #964
 - State Department of Vermont Taxes Certificate

Company Experience

Five Year Client List

The following pages contain our Five Year Client List.

FIVE YEAR CLIENT LIST



Appraisal & Tax

Client	Year Signed	Type of Service
Alaska		
Municipality of Anchorage	2016, 2017, 2019 2018	Landisc, MAS iasWorld, Landisc, MAS
Ketchikan Gateway Borough	2020	iasWorld
Arizona		
Apache County		Eagle
Coconino County		Eagle
Gila County		Eagle
Greenlee County		Eagle
La Paz County		Eagle
Mohave County		Eagle
Yuma County		Eagle
California		
Alameda County	2016, 2017, 2018, 2019, 2020	AES
Contra Costa County	2016, 2017, 2018, 2019	AES
Imperial County	2017, 2018	AES
Monterey County	2016, 2017	AES
Orange County	2016, 2019	AES
Riverside County	2016, 2017, 2018, 2019	AES
San Bernardino County	2016, 2019, 2020	AES
San Diego County	2016 2018, 2019, 2020	AES, MAS AES
San Joaquin County	2016, 2017, 2018, 2019, 2020	AES
San Luis Obispo County	2016, 2017, 2018, 2019, 2020	AES
Santa Clara County	2016, 2017, 2018, 2019, 2020	AES
Solano County	2016, 2017, 2018, 2019, 2020	AES
Sonoma County	2016, 2019	AES
Stanislaus County	2019	AES
Ventura County	2016, 2017, 2018, 2019, 2020	AES
Colorado		
City & County of Denver	2017, 2018 2020	Landisc, MAS, OASIS iasWorld
Logan County	2016, 2017, 2018, 2019, 2020	iasWorld
Adams County		Eagle
Archuleta County		Eagle
Boulder County		Eagle
Broomfield County		Eagle
Clear Creek County		Eagle
Delta County		Eagle
Douglas County		Eagle
Eagle County		Eagle
Elbert County		Eagle
Fremont County		Eagle
Garfield County		Eagle

Five Year Client List

Client	Year Signed	Type of Service
Gilpin County		Eagle
Grand County		Eagle
Hinsdale County		Eagle
La Plata County		Eagle
Las Animas County		Eagle
Lincoln County		Eagle
Mesa County		Eagle
Moffat County		Eagle
Montezuma County		Eagle
Montrose County		Eagle
Morgan County		Eagle
Otero County		Eagle
Ouray County		Eagle
Phillips County		Eagle
Pitkin County		Eagle
Rio Blanco County		Eagle
Routt County		Eagle
San Miguel County		Eagle
Teller County		Eagle
Weld County		Eagle
Connecticut		
Town of Bethel	2016	Appraisal, Landisc, Univers
	2017	iasWorld, Tyler Verify
	2018, 2019, 2020	iasWorld
Town of Darien	2017	Appraisal, iasWorld
	2016, 2018, 2019, 2020	iasWorld
City of Derby	2016	Appraisal, Univers
	2017	Univers
	2018, 2019	Landisc, Univers
	2020	Appraisal
Town of Durham	2016, 2017, 2018	Landisc, Univers
	2019	iasWorld, Landisc, Univers
Town of Farmington	2017	Appraisal
Town of Franklin	2017	Appraisal
Town of Greenwich	2016, 2017, 2019	Appraisal
Town of Groton	2016	Appraisal, iasWorld
	2017, 2018, 2019, 2020	iasWorld
	2016, 2017, 2019, 2020	iasWorld
Town of Killingly	2018	Appraisal
	2017	Appraisal
Town of Norwalk	2017	Appraisal
Town of Plainville	2016	Appraisal, iasWorld
	2017, 2018, 2019	iasWorld
	2016	Appraisal, Landisc, Univers
Town of Plymouth	2017, 2018, 2019, 2020	Landisc, Univers
	2016	Appraisal, iasWorld
Town of Portland	2017, 2018, 2019, 2020	iasWorld
	2018	Appraisal
	2017	Appraisal
Town of Putnam	2018, 2019	iasWorld
	2016, 2017	Univers
Town of Sterling	2016, 2017, 2018, 2019, 2020	iasWorld
Town of Thomaston	2016, 2017, 2018	Landisc, Univers
	2019	Appraisal, iasWorld, Landisc, Univers



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Five Year Client List

Client	Year Signed	Type of Service
Town of Windsor Locks	2016, 2017, 2020 2018 2019	Appraisal Appraisal, iasWorld iasWorld
Delaware		
City of Dover	2016, 2017, 2018, 2020 2019	iasWorld Appraisal, iasWorld
City of Milford	2016, 2017, 2018, 2019, 2020	Appraisal, Landisc, Univers
Town of Smyrna	2016, 2017, 2018, 2019 2020	Appraisal, Landisc, Univers Landisc, Univers
Sussex County	2019	iasWorld
Florida		
Citrus County	2016, 2017, 2018, 2019	iasWorld
Hernando County	2016, 2017	Tyler Verify
Leon County	2016, 2017, 2018, 2019	iasWorld
Manatee County	2016, 2017, 2018, 2019	iasWorld
Miami-Dade County	2016	Tyler Verify
Palm Beach County	2016, 2017, 2018, 2019, 2020	iasWorld
Volusia County	2016	iasWorld
Georgia		
Augusta-Richmond	2017, 2020	iasWorld
Baldwin County	2016, 2018, 2019, 2020	iasWorld
Chatham County	2017, 2018, 2019, 2020	iasWorld
Clayton County	2017 2019	iasWorld Tyler Verify
Cobb County	2016, 2018 2017, 2019 2020	Appraisal, iasWorld iasWorld Appraisal
Columbia County	2016, 2018, 2019	iasWorld
Columbus Consolidated Gov.	2016, 2018, 2019 2017	iasWorld Appraisal, iasWorld
DeKalb County	2016, 2017, 2018 2019, 2020	iasWorld, Tyler Verify iasWorld
Fayette County	2016, 2017, 2018, 2019, 2020	iasWorld
Forsyth County	2016, 2017, 2018, 2019, 2020	iasWorld
Fulton County	2016, 2017, 2018, 2019, 2020	iasWorld
Gwinnett County	2018, 2019, 2020	Appraisal
Hawaii		
Hawaii County	2016 2017, 2018, 2019	iasWorld, IAS BPAS iasWorld
City & County of Honolulu	2016 2017, 2018, 2019	iasWorld, IAS BPAS iasWorld
Kauai County	2016 2017	iasWorld, IAS BPAS iasWorld
Maui County	2016 2017, 2018 2019	IAS, IAS BPAS IAS iasWorld
Illinois		
Cook County	2018	Market Modeling
DuPage County	2020	iasWorld

Five Year Client List

Client	Year Signed	Type of Service
Indiana		
Clay County	2018	Appraisal
Crawford County	2018	Appraisal
Dearborn County	2017	Appraisal
Dubois County	2017	Appraisal
Floyd County	2017	Appraisal
Fountain County	2017	Appraisal
Gibson County	2017	Appraisal
Greene County	2018	Appraisal
Jackson County	2017	Appraisal
Jefferson County	2017	Appraisal
Jennings County	2017	Appraisal
Johnson County	2018	Appraisal
Knox County	2018	Appraisal
Montgomery County	2016, 2018	Appraisal
Owens County	2017	Appraisal
Parke County	2017	Appraisal
Perry County	2017	Appraisal
Posey County	2016, 2017	Tyler Verify
	2018	Appraisal, Tyler Verify
Ripley County	2017	Appraisal
Scott County	2017	Appraisal
Spencer County	2018	Appraisal
Sullivan County	2018	Appraisal
Switzerland County	2017	Appraisal
Vermillion County	2017	Appraisal
Warrick County	2017	Appraisal
Washington County	2017	Appraisal
Iowa		
City of Davenport	2016	Univers
Kansas		
State of Kansas DOR	2018	Orion
Bourbon County	2016, 2018, 2019, 2020	Tyler Verify
Butler County	2016	Orion Consulting
Comanche County	2016, 2017	Tyler Verify
Cowley County	2016, 2017, 2018, 2019	Tyler Verify
Crawford County	2016	Orion Consulting
Douglas County	2016, 2017, 2018, 2019	Tyler Verify
	2020	Orion, Tyler Verify
Ellis County	2016, 2017, 2018, 2019	Tyler Verify
Finney County	2019	Orion
Geary County	2016, 2017	Tyler Verify
Johnson County	2016, 2017, 2018, 2019	Orion, Tyler Verify
	2020	Orion
Linn County	2016, 2017, 2018, 2019	Tyler Verify
Lyon County	2016, 2017, 2018,	Tyler Verify
	2019	Orion, Tyler Verify
Marion County	2016, 2017, 2018, 2020	Tyler Verify
Meade County	2016, 2017, 2018, 2019	Tyler Verify
Osage County	2016, 2018, 2019, 2020	Orion
Pratt County	2017, 2018, 2019	Tyler Verify
Riley County	2016, 2017, 2018, 2019, 2020	Tyler Verify
Sedgwick County	2016	Orion
	2017, 2018, 2019	Orion, Tyler Verify



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Five Year Client List

Client	Year Signed	Type of Service
Sumner County Wyandotte County	2016, 2017 2016, 2017, 2018, 2019, 2020	Tyler Verify Orion
Kentucky Fayette County Hardin County	2016, 2017, 2018, 2019, 2020 2016, 2017, 2018, 2019	iasWorld Landisc, Univers
Louisiana City of New Orleans Orleans Parish	2016 2016, 2017, 2018 2019	iasWorld iasWorld Appraisal, iasWorld
Maine City of Bath City of Lewiston City of Portland	2016, 2018 2017, 2018, 2019, 2020 2016, 2017 2018, 2019, 2020	iasWorld iasWorld iasWorld Appraisal, iasWorld
Maryland Baltimore County	2016, 2019	OASIS
Massachusetts MassIT Town of Ashland City of Brockton City of Chicopee Town of Holliston Town of Natick City of Northampton City of Peabody City of Pittsfield Town of Seekonk Town of Somerset City of Springfield Town of Stow	2017 2020 2016 2017 2018, 2019 2020 2016, 2018, 2019, 2020 2017 2019 2016 2017 2016 2017, 2019, 2020 2018 2016, 2017, 2018, 2019 2020 2016 2017, 2018, 2019, 2020 2020 2020 2016, 2019 2017, 2018, 2020 2016, 2017, 2018 2019	iasWorld Appraisal Appraisal Appraisal, Landisc, Univers Appraisal, iasWorld Tyler Verify Appraisal Univers Appraisal Landisc, Univers iasWorld, Landisc, Univers, Tyler Verify Landisc, Univers Appraisal, iasWorld iasWorld Appraisal, iasWorld iasWorld Appraisal, iasWorld, Univers Appraisal, iasWorld Appraisal Appraisal iasWorld Appraisal, iasWorld Appraisal, Univers Univers
Michigan City of Benton Harbor City of Detroit	2016 2016	Appraisal Appraisal
Minnesota Anoka County Beltrami County	2016, 2017 2019	iasWorld iasWorld

Five Year Client List

Client	Year Signed	Type of Service
Blue Earth County	2018, 2020	iasWorld
Brown County	2019	iasWorld
Crow Wing County	2017, 2018, 2020	iasWorld
Dakota County	2016, 2017, 2018, 2019, 2020	iasWorld
Hubbard County	2019	iasWorld
Martin County	2020	iasWorld
City of Minneapolis	2019	iasWorld
Olmsted County	2016, 2017, 2018, 2019	iasWorld
Ramsey County	2016, 2017, 2018, 2019, 2020	iasWorld
Scott County	2017, 2020	iasWorld
Watonwan County	2020	iasWorld
Wright County	2020	iasWorld
Missouri		
Cape Girardeau County	2016, 2017, 2018, 2019, 2020	iasWorld
Clay County	2016, 2017	Tyler Verify
Greene County	2016, 2017, 2018, 2019, 2020	iasWorld
Jasper County	2018, 2019, 2020	iasWorld
Knox County	2017, 2018, 2019, 2020	Univers
St. Louis County	2016, 2017, 2018, 2019	iasWorld
Montana		
State of Montana DOR	2016, 2017, 2018, 2019, 2020	Orion
Nebraska		
Adams County	2016, 2017	Orion
Lancaster County	2016, 2017, 2018, 2019, 2020	Orion, Tyler Verify
Lincoln County	2016, 2018	Orion
New Hampshire		
Town of Conway	2016, 2017, 2018, 2019, 2020	Landisc, Univers
City of Dover	2016, 2017, 2018, 2019, 2020	Landisc, Univers
City of Franklin	2016	Landisc, Univers
Town of Gilford	2016, 2017, 2018, 2019, 2020	Landisc, Univers
Town of Holderness	2016, 2017	Landisc, Univers
Town of Newington	2016, 2017, 2018, 2019	Landisc, Univers
Town of Peterborough	2017	Appraisal, iasWorld
	2016, 2018, 2019, 2020	iasWorld
Town of Plaistow	2016, 2017, 2018, 2019, 2020	Landisc, Univers
New Jersey		
Voorhees Township	2016, 2017, 2018, 2019, 2020	Landisc, Univers
New Mexico		
Bernalillo County	2016, 2017, 2018, 2019, 2020	iasWorld
Chaves County		Eagle
Cibola County		Eagle
Colfax County		Eagle
Doña Ana County		Eagle
Grant County		Eagle
Los Alamos County		Eagle
McKinley County		Eagle
Otero County		Eagle
Rio Arriba County		Eagle
Roosevelt County		Eagle



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Five Year Client List

Client	Year Signed	Type of Service
Sandoval County		Eagle
San Juan County		Eagle
San Miguel County		Eagle
Socorro County		Eagle
Valencia County		Eagle
New York		
State of New York	2017	iasWorld
Town of Brookhaven	2016, 2017, 2018, 2019, 2020	iasWorld
Village of Garden City	2020	iasWorld
Town of Greenburgh	2016, 2017, 2018, 2019	Appraisal
Town of Lewisboro	2016, 2017, 2018, 2019	Univers
Village of Mineloa	2016, 2017, 2018, 2019, 2020	Univers
Nassau County	2016, 2017, 2018, 2019, 2020	iasWorld
City of New York	2017	iasWorld
Town of Ossining	2017, 2018, 2019	Appraisal
Town of Rhinebeck	2018	Appraisal
Town of Rye	2017, 2018	Appraisal
Town of Southampton	2016, 2017, 2018, 2019, 2020	Appraisal
Tompkins County	2017	Tyler Verify
North Carolina		
Alamance County	2017, 2018, 2019, 2020	Tyler Verify
Alleghany County	2016	Landisc, Univers
	2017, 2018	Univers
Anson County	2016, 2017, 2018, 2019, 2020	MAS
Catawba County	2016, 2017, 2018, 2019, 2020	iasWorld
Cumberland County	2016, 2018, 2019	OASIS
Currituck County	2016, 2017, 2018, 2020	iasWorld
	2019	Appraisal, iasWorld
Dare County	2016, 2017, 2018, 2019, 2020	iasWorld, Tyler Verify
Davidson County	2016, 2017, 2018, 2019	Tyler Verify
Durham County	2017	Tyler Verify
Franklin County	2017, 2018, 2019, 2020	iasWorld
	2016	Appraisal, iasWorld, Tyler Verify
Gaston County	2016, 2017, 2018, 2019	Tyler Verify
Greene County	2016, 2017, 2018, 2019	Univers
Halifax County	2016, 2018, 2020	iasWorld
Hoke County	2016, 2017, 2018, 2019	Univers
Jackson County	2016, 2017, 2018, 2019	Tyler Verify
Jones County	2016, 2017, 2018, 2019, 2020	iasWorld
Lee County	2018, 2019	iasWorld
	2016, 2017	iasWorld Tyler Verify
Lincoln County	2016, 2017, 2018, 2019	Tyler Verify
Macon County	2016, 2017, 2018, 2019	Tyler Verify
Martin County	2016, 2017, 2018, 2019, 2020	Landisc, Univers
Moore County	2016, 2017, 2018, 2019, 2020	iasWorld
Nash County	2016, 2017, 2018, 2019, 2020	iasWorld
New Hanover County	2017, 2018, 2019, 2020	iasWorld
Onslow County	2016, 2017, 2018, 2019	iasWorld
Pasquotank County	2016, 2017, 2018, 2019, 2020	Univers
Pender County	2017	Appraisal, iasWorld
Rowan County	2016, 2017, 2018, 2019	iasWorld
Rutherford County	2016	Tyler Verify
Sampson County	2016, 2017, 2018, 2019, 2020	iasWorld
Wake County	2017	Tyler Verify

Five Year Client List

Client	Year Signed	Type of Service
Watauga County	2016, 2017, 2018, 2019, 2020	iasWorld
Wilkes County	2016, 2017, 2020 2018, 2019	iasWorld Appraisal, iasWorld
Yadkin County	2017	Tyler Verify
Yancey County	2016 2017, 2018, 2019, 2020	Appraisal, Landisc, Univers Landisc, Univers
North Dakota		
City of Jamestown	2016, 2017, 2018, 2019	Orion
Stutsman County	2016, 2017, 2018, 2019	Orion
Ohio		
Ashtabula County	2016, 2017, 2018, 2019	iasWorld
Athens County	2016, 2017, 2018 2019	Appraisal, iasWorld iasWorld
Auglaize County	2016, 2019, 2020 2017, 2018	IAS Appraisal, IAS
Butler County	2016, 2017 2018 2019	iasWorld, Tyler Verify Appraisal, iasWorld Tyler Verify iasWorld
Clark County	2016, 2017, 2019 2018	Appraisal, iasWorld iasWorld
Clermont County	2016 2017, 2019, 2020 2018	Appraisal, iasWorld iasWorld iasWorld, Tyler Verify
Coshocton County	2016, 2017, 2018, 2019, 2020	iasWorld
Fairfield County	2017, 2018, 2019 2016	iasWorld Appraisal
Franklin County	2016 2018 2019, 2020	iasWorld, Tyler Verify Appraisal, iasWorld iasWorld
Gallia County	2016, 2018 2017, 2019, 2020	IAS, Tyler Verify Appraisal, iasWorld Tyler Verify
Greene County	2016, 2018 2017, 2019, 2020	Appraisal, iasWorld iasWorld
Jackson County	2016, 2017, 2018 2019	IAS iasWorld
Lake County	2016 2017, 2019, 2020	Appraisal iasWorld
Lorain County	2018	Appraisal
Lucas County	2016, 2017, 2018, 2019, 2020	iasWorld
Miami Conservancy District	2020	iasWorld
Montgomery County	2016 2017, 2018, 2019	Appraisal, iasWorld iasWorld
Morgan County	2016, 2017, 2018	IAS
Ottawa County	2016, 2017, 2018, 2020	iasWorld
Pickaway County	2016, 2017 2018, 2019	IAS Appraisal, IAS
Pike County	2018	iasWorld
Richland County	2016, 2017 2018, 2019 2020	iasWorld Appraisal, iasWorld Appraisal
Scioto County	2016, 2017, 2018, 2019	Appraisal
Seneca County	2016, 2017, 2018, 2019, 2020	iasWorld
Stark County	2016, 2019	iasWorld
Summit County	2016, 2017, 2018, 2019, 2020	iasWorld



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Five Year Client List

Client	Year Signed	Type of Service
Oregon		
Curry County	2020	Orion
Douglas County	2018	Orion
Josephine County	2018, 2019	Orion
Lincoln County	2018, 2019	Orion
Multnomah County	2017, 2018, 2019, 2020	Orion
Washington County	2016, 2017	Orion
Pennsylvania		
Allegheny County	2016, 2017, 2018, 2019, 2020	iasWorld
Armstrong County	2016, 2017, 2018, 2019, 2020	IAS, Landisc
Beaver County	2020	Appraisal, iasWorld
Bedford County	2016, 2017, 2018, 2019, 2020	iasWorld
Berks County	2016, 2017, 2018 2019	MAS iasWorld
Bucks County	2016, 2017, 2019, 2020	iasWorld
Butler County	2017, 2018, 2020 2019	iasWorld iasWorld, Tyler Verify
Carbon County	2016, 2017, 2018, 2019, 2020	Landisc, Univers
Chester County	2016, 2017 2019, 2020	IAS, Landisc iasWorld
Clarion County	2017, 2018, 2019, 2020	iasWorld
Columbia County	2016, 2017, 2018, 2019, 2020	iasWorld
Delaware County	2016, 2018, 2019, 2020 2017	iasWorld Appraisal, iasWorld
Erie County	2016, 2017, 2018, 2019, 2020	iasWorld
Fayette County	2016, 2017, 2018, 2019, 2020	Landisc
Juniata County	2018	iasWorld
Lackawanna County	2019	iasWorld
Lycoming County	2018	iasWorld
Mercer County	2018, 2020	iasWorld
Monroe County	2016	Appraisal, iasWorld
Montgomery County	2016, 2017, 2018, 2019	iasWorld
Montour County	2016, 2017, 2018, 2019	Landisc, Univers
Northampton County	2018	iasWorld
City of Philadelphia	2017	iasWorld
Somerset County	2016	MAS
Sullivan County	2016, 2017, 2018, 2019	Landisc, Univers
Washington County	2015, 2017, 2018 2016	iasWorld Appraisal, iasWorld
Westmoreland County	2016, 2018, 2019	iasWorld
York County	2017, 2018, 2019, 2020	iasWorld
South Carolina		
Lexington County	2019	iasWorld
South Dakota		
Lawrence County	2018, 2019, 2020	Orion
Meade County	2018, 2020	Orion
Pennington County	2016, 2017, 2019 2018, 2020	Orion, Tyler Verify Orion
Tennessee		
State of Tennessee	2016, 2017	iasWorld
Knox County	2018, 2020	iasWorld

Five Year Client List

Client	Year Signed	Type of Service
Shelby County	2016, 2017, 2018, 2019, 2020	iasWorld
Texas		
Texas Comptroller of Public Acct.	2016, 2017, 2018, 2019, 2020	Orion
Anderson County	2016, 2017, 2018, 2019	Orion
Bastrop County	2016, 2017, 2018, 2019	Orion
City of Brookshire	2019, 2020	Orion
Coleman County	2016, 2017, 2018, 2019, 2020	Orion
Denton County	2016, 2017, 2018, 2020	Tyler Verify
Fort Bend County	2016, 2017, 2018, 2019, 2020	Orion, Tyler Verify
Franklin County	2016, 2017, 2018, 2019, 2020	Orion
Galveston County	2016, 2017	Orion
Gonzales County	2016, 2017, 2018, 2019	Orion
Grayson County	2016, 2018, 2019	Orion
Grimes County	2016, 2017, 2018, 2019, 2020	Orion
Guadalupe County	2016, 2017, 2018, 2019	Orion
Hays County	2016, 2020	Orion
	2017, 2018, 2019	Orion, Tyler Verify
Hutchinson County	2016, 2017, 2018, 2019	Orion
Jackson County	2016, 2017, 2018, 2019	Orion
Jasper County	2016, 2017, 2018, 2019	Orion
Lavaca County	2016, 2017, 2018, 2019	Orion
Limestone County	2016, 2017, 2018, 2019, 2020	Orion
Lubbock County	2016, 2017, 2018, 2019, 2020	Orion, Tyler Verify
McLennan County	2018	Tyler Verify
Medina County	2016, 2017, 2018, 2020	Orion
Montgomery County	2016, 2017, 2019	Orion
	2018	Orion, Tyler Verify
Orange County	2016, 2017, 2018, 2019	Orion, Tyler Verify
Palacios ISD	2016, 2017, 2018, 2019	Orion
San Jacinto County	2016, 2017, 2018, 2020	Orion
Victoria County	2016, 2017, 2018, 2019, 2020	Orion
Waller County	2016, 2017, 2018, 2019	Orion
Washington County	2016, 2017, 2018, 2019	Orion
Williamson County	2016, 2017, 2018, 2020	Orion, Tyler Verify
	2019	Orion
Winkler County	2017, 2018, 2020	Orion
Wood County	2016, 2019, 2020	Orion
Utah		
Box Elder County		Eagle
Iron County		Eagle
Juab County		Eagle
Kane County		Eagle
Millard County		Eagle
Sevier County		Eagle
Summit County		Eagle
Washington County		Eagle
Vermont		
City of Burlington	2019	Appraisal
City of South Burlington	2019	Appraisal

Five Year Client List

Client	Year Signed	Type of Service
Virginia		
City of Chesapeake	2016, 2017, 2018, 2019	Tyler Verify
Chesterfield County	2019, 2002	iasWorld
Fairfax County	2016, 2017, 2018, 2019, 2020	iasWorld
City of Fredericksburg	2017	iasWorld
Loudoun County	2016, 2017, 2018, 2019, 2020	iasWorld
City of Manassas Park	2016, 2018, 2019	Landisc, Univers
Montgomery County	2016, 2017, 2018, 2019, 2020	iasWorld
City of Newport News	2016, 2017, 2018, 2019	iasWorld
Wise County		Eagle
West Virginia		
State of West Virginia	2016, 2018, 2019 2020	IAS Appraisal, iasWorld
Boone County	2018, 2019	Appraisal
Jackson County	2016, 2017, 2018, 2019, 2020	Landisc
Kanawha County	2016, 2019	Appraisal
Mason County	2017, 2018, 2019	Appraisal, Landisc
	2016	Landisc
	2019	Appraisal
Ohio County	2016	Appraisal
Putnam County	2016, 2017, 2020	Appraisal
Wetzel County	2017, 2018, 2019, 2020	Landisc
Wood County	2019	Appraisal
Wisconsin		
State of Wisconsin DOR	2016, 2017, 2018, 2019, 2020	iasWorld
City of Baraboo	2018, 2020	Appraisal
City of Beloit	2017, 2020	Appraisal
Village of Caledonia	2017	Appraisal
	2020	Appraisal, Univers
Village of Chenequa	2017	Appraisal
City of Franklin	2016, 2019	Appraisal
Town of Grand Chute	2016, 2017, 2019	Appraisal
Village of Greendale	2016, 2017, 2020	Appraisal
City of Manitowoc	2016	Appraisal
Village of Menomonee Falls	2016, 2017	IAS, Landisc
	2018	Appraisal, IAS, Landisc
	2019, 2020	Landisc
City of Muskego	2016, 2017, 2020	iasWorld
	2018	Appraisal, iasWorld
City of New Berlin	2016, 2017, 2018, 2019	IAS, Landisc
City of Oak Creek	2016, 2019	Appraisal
Village of Oconomowoc Lake	2016	Appraisal
City of Oshkosh	2016, 2018, 2019	Appraisal, iasWorld
	2017	iasWorld
Village of River Hills	2016, 2018	Appraisal
City of South Milwaukee	2016	Appraisal
City of Sun Prairie	2019	Appraisal
Town of Waukesha	2016, 2019	Appraisal
City of West Allis	2017	Appraisal
Village of Whitefish Bay	2016, 2017, 2019	Appraisal

Five Year Client List

Client	Year Signed	Type of Service
Australia		
City of Whittlesea	2016, 2017, 2018	spatialest
Bahamas		
Commonwealth of the Bahamas	2016 2017, 2018, 2020 2019	iasWorld, Tyler Verify iasWorld Appraisal
Canada		
Province of British Columbia	2016	iasWorld, Tyler Verify
City of Calgary	2016, 2019, 2020	iasWorld
Province of Newfoundland	2016, 2017, 2018, 2019, 2020	iasWorld
Province of Nova Scotia	2016, 2017, 2018, 2019	iasWorld

Current Northeastern Appraisal Services Client List

Client	Parcel Count	Project Type	Contact Person	Address	Phone Number
Connecticut					
Town of Bethel	7,398	Statistical Revaluation	Elizabeth Hirt, Assessor	1 School Street Bethel, CT 06801	203-794-8507
Town of Darien	7,058	Statistical Revaluation	Anthony Homicki, Assessor	2 Renshaw Drive Darien, CT	203-656-7310
Town of Farmington	11,112	Statistical Revaluation	David Gardner, Town Assessor	1 Monteith Drive Farmington, CT 06032	860-675-2370
Town of Franklin	1,101	Full Revaluation 10/1/18 List	Richard Lasky, Assessor	7 Meetinghouse Hill Rd Franklin, CT 06254	860-642-6475
Town of Greenwich	20,500	Ongoing Appraisal Support	Lauren Elliott, Esq, Assessor	101 Field Point Road Greenwich, CT 06830	203-622-7885
Town of Groton	12,000	Ongoing Appraisal Support	Mary Gardner, Assessor	45 Fort Hill Road Groton, CT 06340	860-441-6660
City of Middletown	14,653	Statistical Revaluation	Damon Braasch, Tax Assessor	245 deKoven Drive Middletown, CT 06457	860-638-4930
City of Norwalk	28,460	Full Revaluation 10/1/19 List	William Ford, Assessor	125 East Avenue Norwalk, CT 06856	203-854-7941
Town of Putnam	3,867	Full Revaluation 10/1/19 List	Angela Sanchez, Assessor	126 Church Street Putnam, CT 06260	860-963-6802
Town of Rocky Hill	7,524	Full Revaluation 10/1/19 List	Stuart Topliff, Assessor	761 Old Main Street Rocky Hill, CT 06067	860-258-2722
Town of Thomaston	3,340	Full revaluation	Robert Dudek	158 Main Street Thomaston, CT 06787	860-283-0305
Town of Windsor Locks	12,498	Ongoing Appraisal Support	John Creed, Assessor	50 Church Street Windsor Locks, CT 06096	860-627-1448
Delaware					
City of Dover	13, 158	Full Revaluation	Cheryl A. Bundek, Certified Assessor	5 E. Reed St. P.O. Box 475 Dover, DE 19903	302-736-7022
City of Milford	4,167	Ongoing Appraisal Support	Debbie Johnson, Supervisor	201 South Walnut Street Milford, DE 19963	302-424-3712
Town of Smyrna	3,000	Ongoing Appraisal Support	David Hugg, III, Town Manager	27 South Market Street	302-653-3483
Maine					
City of Portland		Full Revaluation	Christopher Huff, Tax Assessor	389 Congress St. Room 115 Portland, ME 04101	207-874-8486

Client	Parcel Count	Project Type	Contact Person	Address	Phone Number
Massachusetts					
City of Brockton	27,165	FY17 Certification	John P. O'Donnell, Acting Chairman, BOA	45 School Street Brockton, MA 02301	508-580-7191
Town of Natick	13,500	FY 2014 Interim Update	Eric Henderson, Director of Assessing	13 East Central Street Natick, MA 01760	508-647-6420
Town of Northampton	14,300	FY18 Interim Update	Joan C. Sarafin, Assessor	212 Main Street Northampton, MA 01060	413-587-1200
City of Peabody	15,250	Provide permits, as requested	Susan Antonellis, Director, BOA	City Hall, 24 Lowell Street Peabody, MA 01960	978-538-5727
City of Pittsfield	17,527	FY18 Certification	Paula J. King, Chairman, BOA	City Hall, 70 Allen Street Pittsfield, MA 01201	413-395-0102
City of Springfield	42,224	FY18 Certification	Richard J. Allen, Chairman, BOA	City Hall, 36 Court Street Springfield, MA 01103	413-787-6285
Town of Stow	2,500	FY18 Interim Update	Kristen Fox, MAA, Principal Assessor	380 Great Road Stow, MA 01775	978-897-4597
New York					
Town of Cornwall	4,900	Reassessment	Ronald Fiorentino, Assessor	183 Main Street Cornwall, NY 12518	845-534-7290
Town of Greenburgh	28,550	Reassessment Services	Edye McCarthy, Assessor	177 Hillside Avenue Greenburgh, NY 10607	914-989-1520
Town of Ossining	10,138	Reassessment Services	Fernando Gonzalez, Assessor	16 Croton Avenue Ossining, NY 10562	914-762-8274
Town of Rhinebeck	3,833	Reassessment	Matthew Sabia, Appointed Assessor	80 East Market Street Rhinebeck, New York 12572	845-876-4805
Town of Rye	11,200	Reassessment	Denise S. Knauer, Assessor	222 Grace Church Street, Ste. 303 Port Chester, NY 10573	914-939-3566
Town of Southampton	58,254	Ongoing Appraisal Support	Lisa Gore Assessor	116 Hampton Road Southampton, NY	631-283-6020
Pennsylvania					
Monroe County	101,589	Reassessment	Cindy Treible, Chief Assessor	One Quaker Plaza, Room 102 Stroudsburg, PA 18360	570-517-3133
Delaware County	200,000	Reassessment	Mario Civera Jr. Chairman	201 West Front Street Media, PA 19063	610-891-4250
Vermont					
City of Burlington	10,836	Reappraisal	John Vickery, City Assessor	City Hall, Room 17 149 Church Street Burlington, VT 05401	802-865-7114
City of South Burlington	7,525	Reappraisal	R Todd LeBlanc, Assessor	575 Dorset Street South Burlington, VT 05403	802-846-4103

Public Relations Program

Public information and participation are crucial elements in a successful Reappraisal project. Tyler supports an extensive public information effort by working with you. We will establish open and responsive communication with your taxpayers and provide informative materials that are easy to read and understand.

Experienced Tyler personnel will be available to accompany officials for major presentations to the public, community leaders, local service organizations, and the media. We recognize that any contact with a resident constitutes a public relations opportunity. These include phone conversations with residents, project mailings and meetings to discuss values.

The objective of the public information effort is to communicate with the public throughout the Reappraisal. We will educate property owners about the reasons for the Reappraisal, the methods of valuation, and the benefits to the community. All materials and messages will reinforce that the law requires the Reappraisal, that the Reappraisal is being completed in a professional and objective way, and that the goal is fairness and equity.

Scope & Methodology

Appraisal Methodologies

The goal of a revaluation is to estimate market value. As defined by the International Association of Assessing Officers (IAAO), market value is:

- the most probable price which a property should bring in a competitive and open market under all conditions requisite to a fair sale, the buyer and seller, each acting prudently and knowledgeably, and assuming the price is not affected by undue stimulus ("Standard on Ratio Studies," *Assessment Journal*, Sept./Oct. 1999, p. 60).

Valuation Approaches

Income Approach: With this method, the income and expense stream of a property is examined from an investor's point of view. The goal is to achieve a market value by estimating what an informed investor would pay for the income stream associated with a particular piece of real estate. The income approach is typically applied to commercial properties, including apartments, restaurants and shopping plazas.

Cost Approach: With this method, the probable selling price is calculated by estimating how much it would cost to provide a replacement building of similar condition, quality and utility. Local construction costs are analyzed along with land sales to develop what is called the "replacement cost" method. This method is based on the premise that if land value is added to what it would cost to replace the building new – less an allowance for physical, functional and economic depreciations – a rational estimate of the market value can be obtained. The cost approach is computed for all types of property. The cost approach is calibrated to the local market using local sales.

Vacant Land

Tyler will analyze vacant land sales for the various types and sizes of land found in City of Barre's neighborhoods and commercial areas. We will also study residual indications of land values. Based upon these analyses, tables will be developed for land valuation. This process is best described as an application of the sales comparison approach.

Assessor's Input

For each type of property, the Assessor will choose the default approach. Table 1 below shows the methodologies that are most often used.

Table 1: Methodologies Most Often Used

Type of Property	Valuation Methodology
Residential	Cost and market
Commercial and industrial properties, including apartments	Cost and income
Special purpose properties	Cost
Exempt properties	Cost

Sales Analyses

A number of statistical tests that can be performed on the database once the data has been collected. The following reports are just a few that would be helpful in ensuring the accuracy of the City's Reappraisal project.

- Calculation of appraisal to sale median and coefficient of dispersion City-wide and by neighborhood, property class, value quartile, style, age (year built) quartile, and building size quartile.
- Calculation of the price related differential by class, City-wide, and other strata.
- Printouts of selected parcel data and comparison criteria to ensure uniformity.
- Other reports as requested by the Assessor or required by the State.

Tentative Project Schedule

Tentative Project Schedule

The following project timetable is subject to review and mutually agreed upon modifications.

Table 2: Project Schedule

Activity	Completion Dates
Project Commencement	**
Public Relations	April 1, 2021
Review all Residential Sales	August 1, 2022
Review all commercial Sales	August 1, 2022
Building Cost Manuals	August 15, 2022
Market Data Study	August 15, 2022
Land Study and Value Analysis	August 30, 2022
Delivery of Market Rents/Expenses/Cap Factors	August 30, 2022
Completion of Data Collection & Entry Permits	December 30, 2021
Pricing, Review, and Final Valuation	December 1, 2022
Assessor’s Review of Proposed Valuations	December 30, 2022
Assessment Change Noticed Mailed	January 1, 2023
Informal Taxpayer Hearings	February 28, 2023
Informals Resolution	March 15, 2023
Submission of Performance Testing Standards	April 30, 2023
**within 30 days of executed contract	

Pricing

Fee Summary and Allocation

Below is our fee Summary and Allocation for the City of Barre’s 2021 City-Wide Reappraisal.

Activity	Percent	Fee
Bonding, office setup, project setup, CAMA Conversion, Software Installation, training, public relations	3.0%	\$10,164
Data mailers, quality control, data entry	7.0%	\$23,716
Residential Valuation	20.0%	\$67,760
Commercial/Industrial Valuation	10.0%	\$33,880
Residential Field Review, data entry	10.0%	\$33,880
Commercial/Industrial Field Review, incoming production, reconcile cost and income	10.0%	\$33,880
Imaging	10.0%	\$33,880
Impact Notices, residential and commercial/industrial hearings, field work, data entry	10.0%	\$33,880
Project finalization, change notices, special land pricing, client meetings, support of values, Board of Assessment Appeals	20.0%	\$67,760
Total	100.0%	\$338,800
Options:		
Litigation Support, per diem		\$1,000

Clarifications & Understandings

Tyler's Proposal is based on the delivery of the requested appraisal services according to Tyler's standard methodology and Tyler's standard contract(s). That methodology, and that contract(s), have been refined and enhanced over Tyler's many years of operation in the public sector information technology market.

Tyler's submission of its Proposal does not constitute a waiver of Tyler's right to negotiate any and all terms to the mutual satisfaction of the parties.

Tyler will consider its methodology and its contract(s) to be the starting point for those negotiations unless expressly stated otherwise in its Proposal. Tyler's standard contract(s) are included for your reference. To the extent you request to incorporate your bid documents and our proposal documents into the contract package, we will agree to do so as long as the order of priority is (a) the final, negotiated contract; (b) our proposal documentation; and (c) your bid documentation.

Tyler has also provided its Evidence of Insurance certificate. Tyler's insurance program is established at a corporate level and is not subject to change on an individual customer basis.

Tyler retains all intellectual property and confidentiality rights in and to our proprietary and/or confidential information and deliverables, if any.

Tyler is providing representative "exceptions" to standard procurement terms and conditions for your review. This representative list does not negate any of the expectations Tyler has stated above.

- **Insurance**: During the course of performing services under an agreement with the Client, we will agree to maintain the following levels of insurance: (a) Commercial General Liability of at least \$1,000,000; (b) Automobile Liability of at least \$1,000,000; (c) Professional Liability with respect to appraisal services of at least \$1,000,000 aggregate; (d) Workers Compensation complying with applicable statutory requirements; and (e) Excess/Umbrella Liability of at least \$5,000,000. We agree to secure our insurance from a carrier with a minimum AM Best rating of A-:VII. Tyler's insurer evidences Tyler's insurance coverage using a standard Acord form. The coverage limits set forth on our certificate of insurance do not apply separately. Certificates of insurance listing the customer as certificate holder are available upon request after a contract is signed. Copies of Tyler's insurance policies are only made available in the event a claim is disputed or denied. Tyler will disclose its deductibles upon written request, but those deductibles are not subject to customer approval. Tyler is well-positioned financially to satisfy its deductibles. Renewal certificates of insurance will be provided as close as practicable to the date the applicable policy or policies is/are renewed.
- **Ownership/Public Disclosure**: Unless otherwise agreed, we do not agree to work for hire provisions. We reserve the right to protest the public disclosure of our confidential business information/trade secrets but will comply with applicable public records laws.
- **Pricing**: Unless expressly indicated otherwise, the fees we have quoted do not include any taxes.
- **Compliance with RFP**: Tyler's Proposal is in compliance and subject to the RFP terms, **except as modified by, taken exception to, and as otherwise provided in Tyler's proposal.**
- **Payment Terms**: Service fees and associated expenses are billed as provided/incurred and are due forty-five (45) days from receipt of invoice.

- Retainage: Ten percent (10%) retainage shall be paid by the Client upon completion of Tyler's Board of Civil Authority duties on the 2023 Grand List in accordance with the provisions of the Agreement.
- Indemnification: Tyler will defend, indemnify and hold harmless the Client from third party claims in accordance with the standard Tyler contract.



APPRAISAL SERVICES AGREEMENT

This Agreement is made between Tyler Technologies, Inc. and Client.

WHEREAS, Client has issued a Request for Proposal for [REDACTED] ("RFP"); and

WHEREAS, Tyler submitted a proposal in response to said RFP dated [REDACTED] to perform services to fulfill the needs of the Client ("Proposal");

NOW THEREFORE, in consideration of the foregoing and of the mutual covenants and promises set forth in this Agreement, Tyler and Client agree as follows:

SECTION A – DEFINITIONS

- **"Agreement"** means this Appraisal Services Agreement.
- **"Client"** means _____.
- **"Effective Date"** means the last date on which both parties have signed this Agreement.
- **"Force Majeure"** means an event beyond the reasonable control of you or us, including, without limitation, governmental action, war, riot or civil commotion, fire, natural disaster, severe or unusual weather or climatic conditions which exist for a substantial period of time, extreme inflation (defined as eight percent or greater per year) or any other cause that could not with reasonable diligence be foreseen or prevented by you or us.
- **"Investment Summary"** means the total fixed price and per diem rates to complete the services described in this Agreement, attached as Exhibit A.
- **"Invoicing and Payment Policy"** means the invoicing and payment policy. A copy of our current Invoicing and Payment Policy is attached as Exhibit B.
- **"Tyler"** means Tyler Technologies, Inc., a Delaware corporation.
- **"we", "us", "our"** and similar terms mean Tyler.
- **"you"** and similar terms mean Client.

SECTION B – PROFESSIONAL SERVICES

1. Services. We will provide you the professional services, consistent with industry standards, as described in the Statement of Work attached hereto as Exhibit C.
2. Professional Services Fees. You agree to pay us the professional services fees in the amounts set forth in Exhibit A – Investment Summary. Those amounts are payable in accordance with our Invoicing and Payment Policy.
3. Services Warranty. We will perform the services in a professional, workmanlike manner, consistent with industry standards and the specifications described in the Statement of Work – Exhibit C.



- 3.1 We warrant that at a minimum, ninety-eight percent (98%) of the images provided under this Agreement meet the IAAO (International Association of Assessing Officers) desktop review standard and shall be free from defects in material and workmanship. This warranty shall be effective through the term of this Agreement.
- 3.2 In the event any such defects shall appear within such period, we shall, at your choice, either:
- a) Refund the prorated amount of compensation earned from such defective images, or
 - b) Replace or repair defective items at our sole expense, including all shipping costs.
- 3.3 Client and Tyler agree that we are reliant on the accuracy of information provided by you and subject to uncontrollable and natural events such as weather, foliage, the condition of private properties at the time of imaging, and public accessibility to properties in the image collection process. As such, you agree to incorporate such events into your reasonable judgment in determining the defective nature of any single image.
4. Site Access and Requirements. You agree to provide us with access to your personnel as may be reasonably necessary for us to provide the professional services as described herein, subject to any reasonable security protocols or other written policies provided to us as of the Effective Date, and thereafter as mutually agreed to by you and us.
5. Client Assistance. You acknowledge that the services we provide under this Agreement are a cooperative process which may require the time and resources of your personnel. You agree to use all reasonable efforts to cooperate with and assist us as may be reasonably required to meet the agreed upon project deadlines and other milestones for the services. This cooperation includes at least working with us to schedule the services outlined in this Agreement and performing the Client responsibilities described in Exhibit D attached hereto. We will not be liable for failure to meet any deadlines and milestones when such failure is due to Force Majeure or to the failure by your personnel to provide such cooperation and assistance (either through action or omission).
6. Change in Legal Requirements. The parties acknowledge that the terms and conditions of this Agreement are based on the laws, rules and regulations as of the Effective Date. In the event any applicable laws, rules or regulations change so as to create additional work for us not provided for in this Agreement, Client shall allow us a reasonable extension of time to complete the services, and additional compensation as provided in Section C(3) below.
7. Background Checks. For at least the past twelve (12) years, all of our employees have undergone criminal background checks prior to hire. All employees sign our confidentiality agreement and security policies.

SECTION C – INVOICING AND PAYMENT; INVOICE DISPUTES

1. Invoicing and Payment. We will invoice you the fees for the services as per our Invoicing and Payment Policy, subject to Section C(2).
2. Invoice Disputes. If you believe any delivered service does not conform to the warranties in this Agreement, you will provide us with written notice within fifteen (15) days of your receipt of the applicable invoice. The written notice must contain reasonable detail of the issues you contend are

in dispute so that we can confirm the issue and respond to your notice with either a justification of the invoice, an adjustment to the invoice, or a proposal addressing the issues presented in your notice. We will work with you as may be necessary to develop an action plan that outlines reasonable steps to be taken by each of us to resolve any issues presented in your notice. You may withhold payment of the amount(s) actually in dispute, and only those amounts, until we complete the action items outlined in the plan. If we are unable to complete the action items outlined in the action plan because of your failure to complete the items agreed to be done by you, then you will remit full payment of the invoice. We reserve the right to suspend delivery of all services if you fail to pay an invoice not disputed as described above within fifteen (15) days of notice of our intent to suspend services.

3. Additional Services. The Investment Summary contains the related costs required for the project based on our understanding of the specifications you supplied and of the laws, rules and regulations applicable to the project as of the Effective Date. If additional work is required, or if you use or request additional services, we will provide you with an addendum outlining the costs for the additional work. The price quotes in the addendum will be valid for thirty (30) days from date of issuance.

SECTION D – TERM AND TERMINATION

1. Term. This Agreement shall commence on the Effective Date and shall continue through _____. This Agreement may be renewed upon written mutual agreement of the parties.
2. Termination. This Agreement may be terminated as set forth below. In the event of termination, you will pay us for all undisputed fees and expenses related to the services you have received, or we have incurred or delivered, prior to the effective date of termination. Disputed fees and expenses in all terminations other than your termination for cause must have been submitted as invoice disputes in accordance with Section C(2).
 - 2.1 For Cause. If you believe we have materially breached this Agreement, you will invoke the Dispute Resolution clause set forth in Section F(2). You may terminate this Agreement for cause in the event we do not cure, or create a mutually agreeable action plan to address, a material breach of this Agreement within the thirty (30) day window set forth in Section F(2).
 - 2.2 Force Majeure. Either party has the right to terminate this Agreement if a Force Majeure event suspends performance of this Agreement for a period of forty-five (45) days or more.
 - 2.3 Lack of Appropriations. If you should not appropriate or otherwise receive funds sufficient to purchase, lease, operate, or maintain the software or services set forth in this Agreement, you may unilaterally terminate this Agreement upon thirty (30) days written notice to us. You agree not to use termination for lack of appropriations as a substitute for termination for convenience.

SECTION E – INDEMNIFICATION, LIMITATION OF LIABILITY AND INSURANCE

1. Property Damage and Personal Injury Indemnification.
 - 1.1 We will indemnify and hold harmless you and your agents, officials, and employees from and against any and all third-party claims, losses, liabilities, damages, costs, and expenses (including reasonable attorney's fees and costs) for (a) personal injury or property damage to the extent

caused by our negligence or willful misconduct; or (b) our violation of a law applicable to our performance under this Agreement. You must notify us promptly in writing of the claim and give us sole control over its defense or settlement. You agree to provide us with reasonable assistance, cooperation, and information in defending the claim at our expense.

1.2 To the extent permitted by applicable law, you will indemnify and hold harmless us and our agents, officials, and employees from and against any and all third-party claims, losses, liabilities, damages, costs, and expenses (including reasonable attorney's fees and costs) for (a) personal injury or property damage to the extent caused by your negligence or willful misconduct; or (b) your violation of a law applicable to your performance under this Agreement. We will notify you promptly in writing of the claim and will give you sole control over its defense or settlement. We agree to provide you with reasonable assistance, cooperation, and information in defending the claim at your expense.

2. **DISCLAIMER.** EXCEPT FOR THE EXPRESS WARRANTIES PROVIDED IN THIS AGREEMENT AND TO THE MAXIMUM EXTENT PERMITTED BY APPLICABLE LAW, WE HEREBY DISCLAIM ALL OTHER WARRANTIES AND CONDITIONS, WHETHER EXPRESS, IMPLIED, OR STATUTORY, INCLUDING, BUT NOT LIMITED TO, ANY IMPLIED WARRANTIES, DUTIES, OR CONDITIONS OF MERCHANTABILITY OR FITNESS FOR A PARTICULAR PURPOSE.
3. **LIMITATION OF LIABILITY.** EXCEPT AS OTHERWISE EXPRESSLY SET FORTH IN THIS AGREEMENT, OUR LIABILITY FOR DAMAGES ARISING OUT OF THIS AGREEMENT, WHETHER BASED ON A THEORY OF CONTRACT OR TORT, INCLUDING NEGLIGENCE AND STRICT LIABILITY, SHALL BE LIMITED TO THE LESSER OF (A) YOUR ACTUAL DIRECT DAMAGES OR (B) THE AMOUNTS PAID BY YOU UNDER THIS AGREEMENT. THE PRICES SET FORTH IN THIS AGREEMENT ARE SET IN RELIANCE UPON THIS LIMITATION OF LIABILITY. THE FOREGOING LIMITATION OF LIABILITY SHALL NOT APPLY TO CLAIMS THAT ARE SUBJECT TO SECTION E(1.1) ABOVE.
4. **EXCLUSION OF CERTAIN DAMAGES.** TO THE MAXIMUM EXTENT PERMITTED BY APPLICABLE LAW, IN NO EVENT SHALL WE BE LIABLE FOR ANY SPECIAL, INCIDENTAL, PUNITIVE, INDIRECT, OR CONSEQUENTIAL DAMAGES WHATSOEVER, INCLUDING BUT NOT LIMITED TO LOSS OF TAX REVENUE OR CLAIMS RELATED TO VALUATION OF PROPERTY, EVEN IF WE HAVE BEEN ADVISED OF THE POSSIBILITY OF SUCH DAMAGES.
5. **Insurance.** During the course of performing services under this Agreement, we agree to maintain the following levels of insurance: (a) Commercial General Liability of at least \$1,000,000; (b) Automobile Liability of at least \$1,000,000; (c) Professional Liability of at least \$1,000,000; (d) Workers Compensation complying with applicable statutory requirements; and (e) Excess/Umbrella Liability of at least \$5,000,000. We will add you as an additional insured to our Commercial General Liability and Automobile Liability policies, which will automatically add you as an additional insured to our Excess/Umbrella Liability policy as well. We will provide you with copies of certificates of insurance upon your written request.

SECTION F – GENERAL TERMS AND CONDITIONS

1. **Additional Services.** You may purchase additional services at our then-current list price by executing a mutually agreed addendum. The terms of this Agreement will control any such additional purchase(s), unless otherwise specifically provided in the addendum.

2. Dispute Resolution. You agree to provide us with written notice within thirty (30) days of becoming aware of a dispute. You agree to cooperate with us in trying to reasonably resolve all disputes, including, if requested by either party, appointing a senior representative to meet and engage in good faith negotiations with our appointed senior representative. Senior representatives will convene within thirty (30) days of the written dispute notice, unless otherwise agreed. All meetings and discussions between senior representatives will be deemed confidential settlement discussions not subject to disclosure under Federal Rule of Evidence 408 or any similar applicable state rule. If we fail to resolve the dispute, then the parties shall participate in non-binding mediation in an effort to resolve the dispute. If the dispute remains unresolved after mediation, then either of us may assert our respective rights and remedies in a court of competent jurisdiction. Nothing in this section shall prevent you or us from seeking necessary injunctive relief during the dispute resolution.
3. Taxes. The fees in the Investment Summary do not include any taxes, including, without limitation, sales, use, or excise tax. If you are a tax-exempt entity, you agree to provide us with a tax-exempt certificate. Otherwise, we will pay all applicable taxes to the proper authorities and you will reimburse us for such taxes. If you have a valid direct-pay permit, you agree to provide us with a copy. For clarity, we are responsible for paying our income taxes arising from our performance of this Agreement.
4. Nondiscrimination. We will not discriminate against any person employed or applying for employment concerning the performance of our responsibilities under this Agreement. This discrimination prohibition will apply to all matters of initial employment, tenure, and terms of employment, or otherwise with respect to any matter directly or indirectly relating to employment concerning race, color, religion, national origin, age, sex, sexual orientation, ancestry, disability that is unrelated to the individual's ability to perform the duties of a particular job or position, height, weight, marital status, or political affiliation. We will post, where appropriate, all notices related to nondiscrimination as may be required by applicable law.
5. E-Verify. We have complied, and will comply, with the E-Verify procedures administered by the U.S. Citizenship and Immigration Services Verification Division for all of our employees assigned to your project.
6. Subcontractors. We will not subcontract any services under this Agreement without your prior written consent, not to be unreasonably withheld.
7. Binding Effect; No Assignment. This Agreement shall be binding on, and shall be for the benefit of, either your or our successor(s) or permitted assign(s). Neither party may assign this Agreement without the prior written consent of the other party; provided, however, your consent is not required for an assignment by us as a result of a corporate reorganization, merger, acquisition, or purchase of substantially all of our assets.
8. Force Majeure. Except for your payment obligations, neither party will be liable for delays in performing its obligations under this Agreement to the extent that the delay is caused by Force Majeure; provided, however, that within ten (10) business days of the Force Majeure event, the party whose performance is delayed provides the other party with written notice explaining the cause and extent thereof, as well as a request for a reasonable time extension equal to the estimated duration of the Force Majeure event.

9. No Intended Third Party Beneficiaries. This Agreement is entered into solely for the benefit of you and us. No third party will be deemed a beneficiary of this Agreement, and no third party will have the right to make any claim or assert any right under this Agreement.
10. Purpose/Use Of Appraisals. By virtue of this Agreement we are contracted to provide certain services specified herein and recommendations of value to you which are intended for exclusive use by you for determinations of assessment for ad valorem tax purposes. Any use other than that stated above is not authorized nor intended, and most specifically excluded is an opinion of value used for federally related real estate transactions or other mortgage purposes.
11. Entire Agreement; Amendment. This Agreement represents the entire agreement between you and us with respect to the subject matter hereof, and supersedes any prior agreements, understandings, and representations, whether written, oral, expressed, implied, or statutory. Purchase orders submitted by you, if any, are for your internal administrative purposes only, and the terms and conditions contained in those purchase orders will have no force or effect. This Agreement may only be modified by a written amendment signed by an authorized representative of each party.
12. Severability. If any term or provision of this Agreement is held invalid or unenforceable, the remainder of this Agreement will be considered valid and enforceable to the fullest extent permitted by law.
13. No Waiver. In the event that the terms and conditions of this Agreement are not strictly enforced by either party, such non-enforcement will not act as or be deemed to act as a waiver or modification of this Agreement, nor will such non-enforcement prevent such party from enforcing each and every term of this Agreement thereafter.
14. Independent Contractor. We are an independent contractor for all purposes under this Agreement.
15. Notices. All notices or communications required or permitted as a part of this Agreement, such as notice of an alleged material breach for a termination for cause or a dispute that must be submitted to dispute resolution, must be in writing and will be deemed delivered upon the earlier of the following: (a) actual receipt by the receiving party; (b) upon receipt by sender of a certified mail, return receipt signed by an employee or agent of the receiving party; (c) upon receipt by sender of proof of email delivery; or (d) if not actually received, five (5) days after deposit with the United States Postal Service authorized mail center with proper postage (certified mail, return receipt requested) affixed and addressed to the other party at the address set forth on the signature page hereto or such other address as the party may have designated by proper notice. The consequences for the failure to receive a notice due to improper notification by the intended receiving party of a change in address will be borne by the intended receiving party.
16. Client Lists. You agree that we may identify you by name in client lists, marketing presentations, and promotional materials.
17. Confidentiality. Both parties recognize that their respective employees and agents, in the course of performance of this Agreement, may be exposed to confidential information and that disclosure of such information could violate rights to private individuals and entities, including the parties. Confidential information is nonpublic information that a reasonable person would believe to be confidential and includes, without limitation, personal identifying information (e.g., social security numbers) and trade secrets, each as defined by applicable state law. Each party agrees that it will not

disclose any confidential information of the other party and further agrees to take all reasonable and appropriate action to prevent such disclosure by its employees or agents. The confidentiality covenants contained herein will survive the termination or cancellation of this Agreement. This obligation of confidentiality will not apply to information that:

- (a) is in the public domain, either at the time of disclosure or afterwards, except by breach of this Agreement by a party or its employees or agents;
- (b) a party can establish by reasonable proof was in that party's possession at the time of initial disclosure;
- (c) a party receives from a third party who has a right to disclose it to the receiving party; or
- (d) is the subject of a legitimate disclosure request under the open records laws or similar applicable public disclosure laws governing this Agreement; provided, however, that in the event you receive an open records or other similar applicable request, you will give us prompt notice and otherwise perform the functions required by applicable law.

- 18. Non-Solicitation. To the extent allowed by applicable law, you will not (i) solicit for employment or (ii) hire any employee of ours during the term of this Agreement and for a period of six (6) months following the termination of this Agreement without our express written consent.
- 19. Business License. In the event a local business license is required for us to perform services hereunder, you will promptly notify us and provide us with the necessary paperwork and/or contact information so that we may timely obtain such license.
- 20. Governing Law. This Agreement will be governed by and construed in accordance with the laws of the State of _____.
- 21. Multiple Originals and Authorized Signatures. This Agreement may be executed in multiple originals, any of which will be independently treated as an original document. Any electronic, faxed, scanned, photocopied, or similarly reproduced signature on this Agreement or any amendment hereto will be deemed an original signature and will be fully enforceable as if an original signature. Each party represents to the other that the signatory set forth below is duly authorized to bind that party to this Agreement.

22. Limited License Grant and Restrictions.

- a. We grant to you a limited license to use Tyler's _____ software for your internal business purposes only as described in Exhibit C - Statement of Work. Your rights to use the Tyler's _____ software may be revoked at any time if you do not comply with the terms of this Agreement. You agree to return Tyler's _____ software to Tyler, and all copies thereof, upon the termination of this Agreement.
- b. The Documentation is licensed to you and may be used and copied by your employees for internal, non-commercial reference purposes only. Documentation means any online or written documentation related to the use or functionality of Tyler's _____ software that we provide or otherwise make available to you, including instructions, user guides, manuals and other training or self-help documentation.
- c. You may not: (a) transfer or assign Tyler's _____ software to a third party; (b)

reverse engineer, decompile, or disassemble Tyler's _____ software; (c) rent, lease, lend, or provide commercial hosting services with Tyler's _____ software; or (d) publish or otherwise disclose Tyler's _____ software or Documentation to third parties.

d. We reserve all rights not expressly granted to you in this Agreement. Tyler's _____ software and Documentation are protected by copyright and other intellectual property laws and treaties. We own the title, copyright, and other intellectual property rights in Tyler's _____ software and the Documentation. **Tyler's _____ software is licensed, not sold.** Your right to access or use Tyler's _____ software will terminate on _____.

23. Performance Bond. Tyler will secure a performance bond ("Bond") within ten (10) business days after execution of this Agreement in the face amount of _____. The initial term of the Bond is twenty-four (24) months.

24. Grant of License. Tyler grants the Client a perpetual, non-exclusive and limited license to the images and data collected under this Agreement. Tyler and the Client agree that Tyler shall retain ownership of the images and data collected under this agreement and any and all other proprietary rights in or associated with the images. The Client agrees not to distribute, in part or in whole, copies of the images to any third party without the express written consent of Tyler, except as otherwise required by law. Tyler will provide access to the images for the Client's authorized subdivision without additional license fees being due.

25. Contract Documents. This Agreement includes the following exhibits:

Exhibit A	Investment Summary
Exhibit B	Invoicing and Payment Policy
Exhibit C	Statement of Work
Exhibit D	Client Responsibilities

IN WITNESS WHEREOF, a duly authorized representative of each party has executed this Agreement as of the date(s) set forth below.

Tyler Technologies, Inc.
Appraisal & Tax Division

[INSERT CLIENT NAME]

By: _____

By: _____

Name: _____

Name: _____

Title: _____

Title: _____

Date: _____

Date: _____

Address for Notices:

Tyler Technologies, Inc.
One Tyler Way
Moraine, OH 45439
Attention: VP & GM, Appraisal Services

Address for Notices:

[INSERT CLIENT NAME]
[INSERT CLIENT ADDRESS]
[INSERT CLIENT ADDRESS]
Attention: _____

SAMPLE



Exhibit A
Investment Summary

The following Investment Summary details the services to be delivered by Tyler to Client under this Agreement. This Investment Summary is effective as of the Effective Date. Capitalized terms not otherwise defined will have the meaning assigned to such terms in your Agreement.

SAMPLE



Exhibit B Invoicing and Payment Policy

Tyler will provide you with the services set forth in **the Investment Summary and Statement of Work**. Capitalized terms not otherwise defined will have the meaning assigned to such terms in your Agreement.

Invoicing: We will invoice you for the applicable services and for the fees described in the Investment Summary as set forth below. Your rights to dispute any invoice are set forth in your Agreement.

1. Professional Services.

All professional services performed under this Agreement will be invoiced as performed.

2. Expenses. The service fees in the Investment Summary include travel expenses.

Payment. Payment for undisputed invoices is due within forty-five (45) days of the invoice date.

We prefer to receive payments electronically. Our electronic payment information is available by contacting AR@tylertech.com.



Exhibit C Statement of Work

The following Statement of Work details the services to be delivered by Tyler to the Client under your Agreement. This Statement of Work is effective as of the Effective Date. Capitalized terms not otherwise defined will have the meaning assigned to such terms in your Agreement.

SAMPLE



Exhibit D
Client Responsibilities

The following Client Responsibilities details the responsibilities of the Client under your Agreement. These Client Responsibilities are effective as of the Effective Date. Capitalized terms not otherwise defined will have the meaning assigned to such terms in your Agreement.

SAMPLE



CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)

12/18/2020

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an **ADDITIONAL INSURED**, the policy(ies) must be endorsed. If **SUBROGATION IS WAIVED**, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER Hays Companies Inc. 133 Federal Street, 4th Floor Boston MA 02110	CONTACT NAME: Moira Crosby PHONE (A/C, No, Ext): FAX (A/C, No): E-MAIL ADDRESS: mcrosby@hayscompanies.com
	INSURER(S) AFFORDING COVERAGE INSURER A: Hartford Fire Insurance Company INSURER B: Hartford Casualty Insurance Company INSURER C: Lloyds of London Syndicates INSURER D: INSURER E: INSURER F:

COVERAGES

CERTIFICATE NUMBER: 20-21 GL Auto WC UMB


REVISION NUMBER:

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS	
A	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: <input checked="" type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC OTHER:			08UENAY8572	4/1/2020	4/1/2021	EACH OCCURRENCE	\$ 1,000,000
							DAMAGE TO RENTED PREMISES (Ea occurrence)	\$ 1,000,000
							MED EXP (Any one person)	\$ 10,000
							PERSONAL & ADV INJURY	\$ 1,000,000
							GENERAL AGGREGATE	\$ 2,000,000
							PRODUCTS - COMP/OP AGG	\$ 2,000,000
								\$
A	AUTOMOBILE LIABILITY <input checked="" type="checkbox"/> ANY AUTO <input type="checkbox"/> ALL OWNED AUTOS <input checked="" type="checkbox"/> HIRED AUTOS <input type="checkbox"/> SCHEDULED AUTOS <input checked="" type="checkbox"/> NON-OWNED AUTOS			08UENAY8572	4/1/2020	4/1/2021	COMBINED SINGLE LIMIT (Ea accident)	\$ 1,000,000
							BODILY INJURY (Per person)	\$
							BODILY INJURY (Per accident)	\$
							PROPERTY DAMAGE (Per accident)	\$
								\$
B	<input checked="" type="checkbox"/> UMBRELLA LIAB <input checked="" type="checkbox"/> EXCESS LIAB <input type="checkbox"/> OCCUR <input type="checkbox"/> CLAIMS-MADE DED RETENTION \$			08XHUAZ8392	4/1/2020	4/1/2021	EACH OCCURRENCE	\$ 25,000,000
							AGGREGATE	\$ 25,000,000
								\$
B	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	Y/N	N/A	08WHEEL5271	4/1/2020	4/1/2021	<input checked="" type="checkbox"/> PER STATUTE <input type="checkbox"/> OTH-ER	
							E.L. EACH ACCIDENT	\$ 1,000,000
							E.L. DISEASE - EA EMPLOYEE	\$ 1,000,000
							E.L. DISEASE - POLICY LIMIT	\$ 1,000,000
C	Cyber/Privacy Prof Liab			B0621PTYLE000220	12/17/2020	12/17/2021	Primary Limit:	\$10,000,000
C	Cyber/Privacy Prof Liab			B0621PTYLE000320	12/17/2020	12/17/2021	Excess Limit:	\$10,000,000

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

CERTIFICATE HOLDER**CANCELLATION**

Evidence of Insurance	SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.
	AUTHORIZED REPRESENTATIVE James Hays / CEMITC 

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INS025 (201401)



New England Municipal Consultants, Ltd

Serving New England's City Government

March 24, 2021

Janet Shatney, Director
Planning, Permitting & Assessing Services
City of Barre
6 North Main Street, Suite 7
Barre, Vermont 05641

Dear Ms. Shatney:

Please accept this document as our response to the City of Barre's Request for Proposals concerning a 2023 Reappraisal.

New England Municipal Consultants, Ltd (NEMC) is proposing two significant variations to the proposal.

- NEMC is proposing a conversion of your existing CAMA system to Patriot Properties' AssessPro software.
- The completion date for the reappraisal under this proposal will be for the 2024 Grand List.

Immediately following this letter of transmittal, New England Municipal Consultants, Ltd (NEMC) has provided, as required, a proposal for the reappraisal of the City of Barre, Vermont. The enclosed bid includes the conversion of the current assessment system to Patriot Properties, Inc.'s AssessPro CAMA system. Patriot Properties' is NEMC's Vermont business partner. AssessPro is installed in 27 cities and towns in Vermont including Burlington, Montpelier, Springfield, Ludlow, Rutland, St Johnsbury and Manchester.

The proposed AssessPro CAMA (computer assisted mass appraisal) software will provide the City with a cost-effective method for valuation, reporting and all future reappraisals. The software calculates cost, income and/or market values. NEMC is proposing a modified, cost/market system for the City backed up primarily by market sales analysis and comparisons for residential property and the income approach for commercial/industrial property. This valuation model is easily constructed, accurate, presents a clear explanation to the property owner and is easily maintained. It is a market based valuation model based on property sales in the community. NEMC will provide all training and is prepared to provide on-going

P.O. Box 372
Lyndon Center, VT 05852
603 475-9991
bill@nemcvt.net

assistance in future years should the City require service or assistance. A full interface with NEMRC is provided as a portion of this bid.

This bid provides assessment software with all required user licenses, installation of the same, and a complete re-listing and reappraisal of all property along valuation defense services.

The proposal offers an assessment date of April 1, 2024 and a Grand List Abstract issuance date of June, 2 2024. I trust the information submitted meets with your requirements and look forward to demonstrating the product and my abilities at your convenience.

Thank you for considering New England Municipal Consultants for this proposal.

Sincerely,

A handwritten signature in black ink, appearing to read 'W. Krajeski', written in a cursive style.

William J. Krajeski
President

Introduction

New England Municipal Consultants, Ltd. (NEMC) is proposing a full reappraisal of all real estate within the City of Barre, Vermont (City). NEMC's proposal includes a complete conversion to the Patriot Properties AssessPro CAMA system. All CAMA software, conversion and installation costs are included in this proposal.

This proposal provides for an assessment date of April 1, 2024; the 2024 Grand List.

NEMC and its partners will fully measure and list all property within Barre City over a two-year period. All data will be entered into the AssessPro software. Complete values will be calculated according to PVR guidelines and the relevant State of Vermont statutes. NEMC will hold informal public appeals and will assist the City in all formal appeals to both the Assessor and the BCA. We will provide in depth training in the software over the period of the contract.

A list of all recently completed reappraisals performed by NEMC is included with the full client list found in the Attachments section of this proposal.

The Project Supervisor's resume is included in the Attachments section of this proposal.

Project Completion Date

The effective date of the reappraisal shall be April 1, 2024, the 2024 Grand List value date. The project will begin in the fall of 2022. The primary project will be substantially completed by June 24, 2024. Substantial completion is described as the City's ability to mail grievance notices. NEMC is committed to assisting the Assessor in the Grievance and BCA process to complete the 2024 cycle.

Cost Proposal

This proposal is for a complete reappraisal of all property as identified in the City's Request for Proposals issued on January 29, 2021 along with the installation of the AssessPro CAMA software on the City's hardware. The City will be provided with the necessary licenses and training to perform a full range of valuation and administrative functions.

Proposed Cost	\$295,000
Annual Support/License Fee	\$3,000

NEMC's proposal is based on the parcel counts submitted by the City as supplied in the RFP. Should the parcel counts exceed 3,370 total accounts, an

overage charge of \$75 per parcel shall be imposed at the completion of the contract.

NEMC will be amenable to structuring a contract over the project period that assists the City in spreading out costs.

Please note that this proposal does not include

- **The valuation of any personal property. Upon request, NEMC will provide a personal property valuation proposal separate from this proposal.**
- **Microsoft SQL software and licenses required for the AssessPro software. NEMC will quote the cost of the SQL software and license for the City and include that cost in a final proposal should the City not currently hold any compatible SQL license. Currently, a five user SQL 2017 license is available for about \$2,000.**

The annual support and license fee charges shall begin July 1, 2024. The annual fee includes AssessPro licensing, access to Patriot Properties' technical support line and specific updates. A copy of the Customer Software Support and License Agreement is attached to this proposal.

Prime Contractor

NEMC is the prime contractor for the project and retains all responsibility for all subcontractors, billing and the timely and correct completion of the contract. NEMC will be using the following subcontractors in the performance of this project.

- Patriot Properties, Inc will be supplying the AssessPro software and its installation along with the conversion of the existing City NEMRC and CAMA files.

At the City's choice, NEMC will act as a consultant in the future for assessment related activities.

Contacts

NEMC – William J. Krajeski, President
PO Box 372
Lyndon Center, VT 05852
Telephone – (603) 475-9991

Patriot Properties, Inc – James McCathern, CEO

123 Pleasant Street

Marblehead, MA 01945

Telephone – (781) 586-9670

Scope of Services

1. The proposal includes a complete installation of AssessPro CAMA software on the City's hardware. NEMC, with Patriot Properties assistance, will install the AssessPro CAMA system and provide the City with the necessary training to perform a full range of valuation and administrative functions.
2. The proposal includes a complete conversion of all existing data required to create the base database from the City's current CAMA system.
3. NEMC shall perform a complete reappraisal included the measuring and listing of each structure. Each property owner will be individually notified of an approximate date of visit by an appraiser. NEMC shall make two initial attempts to inspect each property. After the second attempt a card will be left with instructions for setting an appointment for inspection. A final letter or notice will be sent to all non-inspected properties after January 1, 2024. Photographs of all primary structures are included in the proposal.
4. NEMC will be responsible for the analysis and construction of all land and building models required to create a cost, market and income approach where desired or required. Generally, NEMC's primary approach is through the construction of a market adjusted cost model. This model is easily understood by the Assessor and property owner and replicates market conditions. Commercial and industrial property will be further backed up by using the income approach.
5. All property will be fully reviewed by the Project Supervisor to place final values.
6. NEMC will conduct informal public hearings independent of the grievance process. With the City's assistance, notices or booklets will be prepared and mailed to each property owner prior to the hearings. This process serves to reduce the grievance load by 50-60% historically. The City shall be responsible for all document and mailing costs for the informal hearings.
7. NEMC will assist the Assessor and BCA in formal local appeals. NEMC will provide up to 16 man-days in these processes. NEMC will assist the Assessor in the creation of the formal grievance notice. The City shall be responsible for all document, envelope and mailing costs.

8. NEMC agrees to provide services in compliance with PVA rules and regulations along with any contractual items.
9. NEMC will provide defense of value at the State level when requested by the City for an agreed to per diem rate.
10. The project will be supervised by William Krajewski. He is a PVA approved supervisor currently supervising reappraisal projects. All NEMC employees used in the City will have PVA approved qualifications.
11. NEMC and the City, during the progress of the work, shall use its best efforts and that of its employees to promote full cooperation and amiable relations with the taxpayers. All publicity and news releases will be cleared with the City. NEMC, upon request of the City, will make available speakers on occasion to acquaint groups with the nature and purpose of the reappraisal.
12. NEMC will provide ongoing training sufficient to allow the Assessors Office to perform all duties required to maintain the assessment file. The Assessor is strongly urged to become involved in the reappraisal process. Training is best delivered in this format. Full, comprehensive manuals are provided as an integrated part of the software.
13. Patriot Properties and NEMRC have a fully developed export/import feature allowing for the rapid movement of data from AssessPro to the City's NEMRC tax billing system.
14. AssessPro is fully compliant with Vermont's Act 68 requirements and current use. NEMC is well versed in the application of both processes.
15. NEMC agrees to provide all services referred to in the RFP as Scope of Services.

Work Schedule

NEMC is prepared to begin the conversion of existing data in early 2022. We would expect property listing to begin in the late summer of 2022 and be completed by fall of 2023. Property review will be slated for March of 2024. NEMC will look to mail preliminary notices of the values in May 2024 with informal hearings in early June 2024. The values will be transferred to the NEMRC system in time for the creation and mailing of formal Grievance Notices on or before June 24, 2024.

Non-Collusive RFP Statement

Through this proposal, NEMC shall be deemed to have represented and warranted: that the Proposal is not made in connection with any competing

Proposer submitting a separate proposal, and is in all respects fair and without collusion or fraud.

Professional Qualifications

William J. Krajewski, President of NEMC, will act as project supervisor. He has been in the reappraisal business for over 40 years. As a municipal assessor and company owner, he has participated in over 80 reappraisals. He has extensive experience in the valuation of all types of property using all three major methods of valuation. In particular, he is highly qualified to construct valuation models and perform the attendant analysis required. Mr. Krajewski has defended valuations before local, state and federal appeals boards and courts. In general, he has complete knowledge of the assessment process from field listing, to review, to valuation, to public awareness, to defense of value. Understanding the public assessment procedure is his greatest asset. Mr. Krajewski also provides part-time services to Patriot Properties primarily in the area of product development and testing. He is currently certified as an Appraiser Supervisor for Vermont appraisal services. His resume is attached.

Patriot Properties, Inc. was incorporated in May of 1985, founded by a group of people with vast experience in the appraisal and reappraisal field. The founders had several principles on which the new corporation was founded which separated them from other companies. Aside from a dedication to timeliness and quality work, the owners of the company all work directly on client projects. This philosophy results in more responsiveness to client needs and closer association between the client and corporate objectives. Patriot Properties, Inc. developed a new state-of-the-art "CAMA" software system, which accurately fills the needs of county and municipal clients. This CAMA system has evolved and been refined over the past years.

In the 30 years since the founding, Patriot Properties, Inc. has installed software or provided services for over 250 counties or municipalities. Their track record in development provides their greatest asset. The product is continually improved and enhanced protecting their clients from software and hardware obsolescence.

Municipal Appraisals Currently Underway or Contracted

Vermont References/Contracts

NEMC currently has three 2021 projects underway in Ludlow, Coventry and Grafton, Vermont. NEMC has been selected in Marshfield, Walden and Roxbury Vermont for 2022 reappraisals and in Manchester and Montpelier, Vermont for 2023 reappraisals.

A complete list of all clients is included in the attachments section.

Public Relations Program

New England Municipal Consultants will provide public information through an initial mailing to all property owners. This process is a proven method for introducing the program and NEMC employees. NEMC will also provide newspaper interviews, posting of information to the City's Internet provider and any other media available and willing to provide a forum for information.

NEMC will provide a notice of new value and explanation to be mailed to each taxpayer after initial approval of values by the appropriate City board. NEMC will then provide sufficient time for informal public hearings.

Quality Control and Testing Procedures

The primary approach to quality control is control of personnel on the ground. Only one or two field appraisers will participate in the project. Each individual is highly trained and experienced in the task. The project supervisor provides substantial quality control through the appointment phase. By personally inspecting property already viewed personnel issues are handled immediately. NEMC will sit with the Assessor and/or his representatives to establish proper listing techniques.

Field review of the full City is the secondary quality control method. NEMC will view each parcel and return any problems for re-listing.

The final result will rest with the analysis and application of parameters set through analysis. Inconsistent value changes within the neighborhood generally point to poor data either before or after collection. Ongoing analysis helps to find issues early.

AssessPro provides numerous avenues for quality control procedures. Table structure provides for only allowed entries. As an example, locations (street names) must be selected from a list. This controls misspelling and non-existent streets from being entered. The software also provides defaults, high entry warnings and complete auditing lists. Security can control what fields an individual is allowed to change, add or delete. At the projects' completion, we will have developed numerous related data tests. These tests are set to look for inconsistent or unlikely data combinations.

AssessPro Methodology

AssessPro is a traditional client-server Windows® based application that is SQL, OLE, ODBC and DDE compatible. It is designed to utilize Microsoft SQL technologies. This means any information in the assessing system is available

"live" to any compatible application, package or database. The software is flexible and therefore does not restrict the upgrading of your database in the future. **Most importantly, the application is a single integrated module. There is no independent residential, commercial or condominium model. The user is in one database.**

Independent, fully functional, annual grand list databases are part of the process. Simply put, the appraiser can access historic databases to value, report, print or analyze. **Record storage and retrieval is fully electronic.**

Patriot Properties' AssessPro application is divided into two main applications: real estate and personal property. Cost, market and income approaches are included with the base package. A Marshall-Swift cost approach, MRA market approach, GIS, and on-line record base is available as an add-on. Each of these primary applications contains both CAMA and administrative functions and modules. The following material describes the AssessPro CAMA system.

Real Estate

AssessPro for Real Estate provides for the full valuation of all property types by any of the three methods of valuation: cost, market and income. The application provides the user with the ability to produce fair market value and then adjust that value for special use considerations, exemptions, and property class assessment adjustments and to finally set main and district tax rates against the value to produce a tax bill. Multiple, inter-related databases can be established for storing sales analysis parcels, new construction data, and historical detailed account information. The number of databases you can create is only limited by data storage limits on servers.

Real Estate administrative functions include the input and storage of all ownership records, sales transaction records, summary annual assessments, betterments, parcel split and combination history and exemptions. Unlimited ownership lines are available and are stored in lookup tables letting the client lookup a parcel by any owner entered by the account. With both location and ownership stored in table format, the user utilizes lookup features to insure accurate data entry and the application of one to many modification formats. Parties of interest (banks, attorneys, relatives, etc) can also be assigned to any account. The process is typically used to create duplicate notices for any particular parcel. The system stores unlimited sales transaction data with detailed immediate grantor information and relates sales including multiple parcels so that the user can view a complete picture of any transaction. Previous assessment summary stores appraised use (agricultural, forestry type adjustments) and assessed values along with exemptions and tax amounts, cap value amounts and new construction cap exemptions. Exemptions can be structured as value or tax reductions and can be partially applied in the event that only a portion of the

property ownership is eligible for exemption. Annual roll procedures are set to provide for a replication of prior year exemptions on a batch basis.

Security is structured by form and function for each system user. Functionality, any access can be granted down to the form level on an add, delete, modify or read-only level. Access to modules, reports, forms and individual databases can be controlled through the security process. The client can build security shells that can then be copied to any user. Changes in the shell are then transportable to each user in that level.

AssessPro provides a record card or summary screen that displays critical information such as ownership, location, value history, sales information, a summary narrative description, legal information, exemptions, and provides a front screen look at the improvement sketch, a photograph and GIS (if available) lot shape.

Fully functional, form based help is available everywhere in the application. Help contains not only field descriptions but also process procedures. The client if desired can print out help in manual form.

Patriot's CAMA or valuation package is table driven and user defined. The vast majority of data fields are table driven providing the user with drop down lists to select valid entry. Land valuation can be constructed using any unit approach contemplated by the user. As an example, land can be constructed in square foot, acre, lot, frontage, or in any combination. The user can set different intervals for pricing, size adjustment and minimum and maximum effects within each neighborhood. Each parcel can be further adjusted by sub-neighborhood factors and up to three individual lot factors.

Cost tables are constructed by the user with the input of construction rates per square foot and per special feature (fireplaces, kitchens, plumbing, etc.). Size, construction material, quality tables, and depreciation grids are built for each building group: residential, commercial, industrial and apartments as an example. Valuations can be easily updated or factored for property uses, types, neighborhoods and other gross areas by using factors that can applied to land, building and/or yard items.

Due to the flexibility of the resident cost process, Patriot has had extensive success with mimicking state cost tables across the country. For those clients requiring national costing service, Patriot is a business partner with Marshall-Swift and has a complete integration of the Marshall-Swift costing methodology available. The process utilizes the establishment of an alias system that provides a seamless look from the Patriot cost to Marshall-Swift cost. This module can be purchased for an additional cost.

The comparable sales approach produces up to 12 comparable sales per parcel. The user can create up to 6 user defined sales and 6 system defined sales. Thirty-six possible variables are available for user weighting. Weights are set between 0 and 100 with 0 meaning skip the variable and 100 meaning that an exact match is required. The total weights selected provide a denominator for an equation with the comparable selected weight providing the nominator. This equation provides a rating for the comparable in terms of the subject. The adjusted sale prices are then multiplied by the rating and a weighted average is calculated as the indicated value for the subject.

AssessPro's income approach is based on direct capitalization. The user can build multiple income neighborhoods with separate lease conditions for. The flexibility of the table-driven system sets expense, vacancy and capitalization rates by neighborhood and then gives the user the ability to easily and clearly adjust the individual account to best parallel market conditions by adjusting vacancy, expenses, reserves and/or the cap rate and adding income at the potential and/or effective gross income level.

Database Lookup

Both the real and personal property applications interface with the lookup module. The user can lookup real estate accounts via the system account number, user account number, parcelID, primary owner name, alternative owner name, primary location or alternative location. Filters provide for many other discovery scenarios. The personal property module provides lookup by account number, identification number, real estate parcel ID, business name, owner name, DBA, location, federal ID and sale tax ID. In each case, a portion of the identifier will produce a list of all matches. As an example, the first few letters of a name or location or just the map number will produce a list. The client chooses from the list and is transferred to the selected account by highlighting and clicking OK.

Database Filters

AssessPro utilizes a powerful filtering system that provides the user with the ability to focus in on any property subset. The filter is divided into 45 categories containing nearly every field in the database. The user selects a folder and then a field. Conditions or parameters can now be set for the selection of specific parcels meeting the criteria. As an example, a database may contain one million parcels. The user however, wishes only to work on only small commercial retail property in three specific neighborhoods. A filter can be set for retail property, for the three neighborhoods selected and with rental space not exceeding 2,500 square feet. The filter will set to those parameters and inform the user of the number of occurrences found in the database. The user now has the ability to scroll through the parcels by any index and view only those parcels selected through the filter. Similarly, reports, extracts, batch card printing or batch

processing functions can be limited by the setting of a filter. Filter parameters can be saved and retrieved by the user. Complicated filters can be shared by users and saved for data verification processes, year-end activities; specific reporting, mailing activities, or any of a multitude of functions run on a reoccurring basis.

The filtering process effectively reduces massive databases to user-defined sub-databases that provide the user with a quick means of querying or changing specific parcel information.

This highly effective tool is used in both the Real and Personal Property modules.

Report Writer

AssessPro utilizes Seagate's Crystal Report Writer to build and modify reports. Patriot has built over 250 reports in real property for various clients and gives every client full access to those reports. These reports include specific definitions for land type reports, building type reports, reports covering exemptions and appeals, asset type reports, year-end studies, counter book type reports and sales reports as only a few examples.

Every client workstation has Crystal embedded tools loaded as a portion of the application. Given permission by the administrator, the user then has access to the full reports folder. The full filtering capability is available in the report module. The user can run a report and filter it for specific field information or the lack thereof (isNull) for any report. Each report can also be exported in ODBC compliant standard formats (Excel, text, Access, etc.) for use in other report applications.

Specific users generally have the full Crystal package loaded on a workstation to provide for modification and creation of custom reports. As in the filter process, these reports can be added to existing or new folders for sharing with specific users granted access to custom folders.

This highly effective tool is available in both the Real and Personal Property modules.

Record Printing

AssessPro provides three types of record cards. A detailed, dual sided card provides a complete look at the parcel. The photograph, sketch diagram, assessment, sales and permit histories are printed. Property characteristics, yard items and special features are on the record card. The cost ladder and land pricing are included. A second single sided card is provided that is generally used internally. This card contains limited information and is generally used for field activities.

A commercial card can also be selected. This card provides the cost and income approach ladder.

Printing can be done individually within each account or can be accomplished through a batch process that also utilizes the filter to select specific accounts to be printed.

The system also includes "Quick Info" card that includes summary information, the photograph and improvement sketch.

Batch Processing

The batch-processing module is used for calculation and batch printing processes. Filters can be set to begin a calculation run for a specific property type. The methods of valuation applied and the final method used for taxation can be set in the batch process. The system also flags all accounts that require calculation and the user can select a "process flagged accounts only" filter. Batch printing of real or personal records can also be accomplished by using the batch-processing module.

Utilities

A third type of batch processing is found in the Utilities module. The Copy Data function is used to copy a specific data field or data line from a source parcel to a set of destination parcels. As an example, if the user were to identify that an industrial parcel was negatively affecting residential parcels within a certain parameter, a filter could be set identifying these properties. The user would then apply a factor to one of those properties, use this parcel as the source, and apply and same adjustment to all other parcels contained in the filter.

Other utilities provided in the module include Audit Trails, Year-End Activities and Direct SQL queries.

Sketching

AssessPro's sketching tools is a highly functional drawing device that provides a fully integrated relationship with the database. All areas drawn and factors applied are imported automatically to the application for calculation. The sketching tools provide the user with easy and quick shape creation. Closure is automatic when a minimal dimension is provided. Angled construction is made easy by providing the user with both rise and distance. Polygons and arcs are constructed to fit any shape possible. Dragging sections out to new dimensions modifies a sketch. Like the vast majority of the application, the user sets area descriptions and assigns the label to each area. The module calculates line distances, areas and perimeters whole foot, half foot, inches, and 1/10-foot

increments or in whole meter increments, 1/10 meter or centimeter increments. The image can then be saved as a BMP, PCX, JPEG or DXF file that is transported to the record card screen for display.

Each labeled area can be tagged with year built, wall height and percent complete labels. The entries provide automatic adjustment of cost in the main application to provide the client with an exacting valuation of the property considering ages, heights and degrees of completion for all building segments. Other functions in the sketching module provide for the assignment of notes directly to the sketch, displaying gross totaling by area type on the sketch, adding non-sketched areas easily, the ability to set a plot plan for multi-building complexes, accessing and attaching BMP files to retain and use field drawings or past hand drawn records, and setting GPS points to move a sketch to GIS applications.

Public Access

Public access is available by two separate means: Counter Terminal configuration and WebPro, an Internet/Intranet format. The Counter Terminal module is typically pointed to a public database. The system displays all critical information about the account and provides for direct printing from the terminal. Access can be set for mouse only use or touch screen technology. The public can access an account by owner name, location or parcel ID.

WebPro provides an ASP shell for the display of information over the Internet. Many clients have chosen to use this same format in an intranet setting also. The advantage of the application as an intranet tool is primarily in workstation setup. Counter Access requires an AssessPro application load. WebPro workstations need Internet Explorer, a readily available, generally free, application. Users can print facsimile cards from their office or home. WebPro can be purchased at an additional fee.

GIS Integration

AssessPro moves GIS from a simple map viewer to a powerful integrated CAMA data manipulation tool. GIS for AssessPro gives the client the ability to discover data using ESRI's ArcObjects® Technology embedded with ESRI's ArcEngine® product and return the data set to the CAMA system. This data set can then be used to browse the parcels, create a report using only this data set or change the data, recalculate the assessments and redisplay the results.

Sales Analysis

The client can create analysis databases for any use. Analysis databases might be created for single-family homes, multi-families, commercial property, vacant

land or any envisioned property set. The user can select the property by sale date or just take all property meeting the criteria regardless of a sale.

In each case, the database created is completely independent of the live database. The user can adjust and manipulate the values and create analysis reports on the results without affecting the live database. This “what-if” ability provides the client with the means of looking to the future of the database (reappraisal) without interrupting the normal day-to-day activities required in the live database.

When the client decides that analysis tables are ready for application to the live database, the processing of copying these tables into the live database is quick and simple. AssessPro currently provides 15 detailed analytical reports and 20 analytical and statistical quartile type reports. Each report is subject to filtering and provides statistical norms such as mean, median, PRD, COD and confidence levels.

A full analysis of all sales within the CITY shall be performed in compliance with PVR rules and requirements.

Attachments

1. Sample Property Record Cards
2. Full client list
3. NEMC informational packet
4. Sample Booklet
5. Resume of William J. Krajewski

230856 000
MBL SUB

1 of 1 RESIDENTIAL
CARD ANYTOWN, VT

Total Card / Total Parcel
APPRAISED: 531,600 / 531,600
USE VALUE: 531,600 / 531,600
ASSESSED: 531,600 / 531,600



Patriot Properties Inc.

PROPERTY LOCATION

Table with 3 columns: No, Alt No, Direction/Street/City. Row 1: 73, DEERFIELD DR, LUDLOW

OWNERSHIP

Table with 2 columns: Owner Name, Unit#. Owners: BAUMGARTEN BRIAN, BEHENSKY PETER. Street 1: 943 DURHAM ROAD. Town/City: EAST MEADOW.

PREVIOUS OWNER

Table with 2 columns: Owner Name, Address. Owners: GRAVES - MATTHEW, GRAVES - CHRISTINA. Street 1: 73 DEERFIELD DRIVE. Town/City: LUDLOW.

NARRATIVE DESCRIPTION

This parcel contains 1. ACRES of land mainly classified as RESD 1 with a CONTEMPORY Building built about 2008, having primarily CLAPBOARD Exterior and 3956 Square Feet, with 1 Unit, 2 Baths, 1 3/4 Bath, 1 HalfBath, 8 Rooms, and 4 Bdrms.

OTHER ASSESSMENTS

Table with 4 columns: Code, Descrip/No, Amount, Com. Int.

PROPERTY FACTORS

Table with 7 columns: Item, Code, Description, %, Item, Code, Description. Includes water, Sewer, Electri, Exmpt, D T TOWN, 100 Topo, s Street, t Gas.

LAND SECTION (First 7 lines only)

Table with 23 columns: Use Code, Description, LUC Fact, No of Units, Depth / PriceUnits, Unit Type, Land Type, LT Factor, Base Value, Unit Price, Adj, Neigh, Neigh Infl, Neigh Mod, Infl 1, %, Infl 2, %, Infl 3, %, Appraised Value, Alt Class, %, Spec Land, J Code, Fact, Use Value, Notes.

IN PROCESS APPRAISAL SUMMARY

Table with 6 columns: Use Code, Land Size, Building Value, Yard Items, Land Value, Total Value. Total Card: 1.000, 411,600, 120,000, 531,600.

Table with 2 columns: Legal Description, User Acct. Legal Description: DEERFIELD DRIVE. User Acct: 363-112-11149.

PREVIOUS ASSESSMENT

Table with 10 columns: Tax Yr, Use, Cat, Bldg Value, Yrd Items, Land Size, Land Value, Total Value, Asses'd Value, Notes, Date. Rows from 2013 to 2020.

SALES INFORMATION

Table with 10 columns: Grantor, Legal Ref, Type, Date, Sale Code, Sale Price, V, Tst, Verif, Notes. Sales to GRAVES, MATTHEW.

BUILDING PERMITS

Table with 9 columns: Date, Number, Descrip, Amount, C/O, Last Visit, Fed Code, F. Descrip, Comment. Permit 08-019 NEW DWLG.

ACTIVITY INFORMATION

Table with 4 columns: Date, Result, By, Name. Activity 11/19/2009 INFO BY PHON.

Sign: VERIFICATION OF VISIT NOT DATA

Total AC/HA: 1.00000 Total SF/SM: 43560 Parcel LUC: 10 RESD 1 Prime NB Desc RURAL VG Total: 120,000 SpI Credit Total: 120,000

No	Alt No	Direction/Street/City
73		DEERFIELD DR, LUDLOW

OWNERSHIP

Unit #: _____

Owner 1: BAUMGARTEN BRIAN

Street 1: 943 DURHAM ROAD

Twn/City: EAST MEADOW

St/Prov: NY Cntry Own Occ: _____

Postal: 11554 Type: NON-STA

ACTIVITY INFORMATION

Date	Result	By	Name
11/19/2009	INFO BY PHON	L	LISTERS

PROPERTY FACTORS

Item	Code	Description	%	Item	Code	Description
Z		water				
o		Sewer				
n		Electri				

Exmpt: _____

CONDO INFORMATION

Location: _____ Phys Cond: Average 7.80%

Ttl Units: _____ Functional: _____

Floor: _____ Economic: _____

% Own: _____ Special: _____

Name: _____ Override: _____

Total: 7.8%

IN PROCESS APPRAISAL SUMMARY

Use Code	Land Size	Building Value	Yard Items	Land Value	Total Value
10	1.000	411,600		120,000	531,600
Total Card	1.000	411,600		120,000	531,600
Total Parcel	1.000	411,600		120,000	531,600

Source: Market Adj Cost Total Assmnt per SQ unit /Card: 134.38 /Parcel: 134.38

PREVIOUS ASSESSMENT

Tax Yr	Use	Building Value	Yard Items	Land Size	Land Value	Total Value	Total Assessed
2020	10	346,700		1.	120,000	466,700	466,700
2019	10	346,700		1.	120,000	466,700	466,700

SALES INFORMATION

Grantor	Legal Ref	Type	Date	Nal Desc	Sale Price	V	Tst	Verif	Assoc PCL Value
GRAVES, MATTHEW	435-085		10/9/2020		635,000	No	No		
GRAVES, MATTHEW	332-263		6/15/2009	FAMILY		No	No		

SPEC FEATURES/YARD ITEMS

Code	Description	A	Y/S	Qty	Size/Dim	Qual	Con	Year	Unit Price	D/S	Dep	LUC	Fact	NB Fa	Appr Value	JCod	JFact	Ass'd Value	
More: N	Total Yard Items:																		
	Total Special Features:																		

LAND SECTION

Code	Description	Fact	Units	Depth/PrUni	Unit Type	Land Type	Factor	Base	Price	Adj	NBC	N.INF	N.Mod	Inf1	%	Inf2	%	Inf3	%	Appraised	Alt Clas	%	Spec	J	Fact	Use Value	Notes		
10	RESD 1		1		SITE ACRE	SITE		0	120,000.	1.00	RRV		DR							120,000						120,000			
Total AC/HA:		1.00000		Total SF/SM:		43560		Parcel LUC:		10		RESD 1		Prime NB Desc		RURAL VG		Total:		120,000		Spl Credit		Total:		120,000		More: Y	

EXTERIOR INFORMATION

Type: CONTEMPORY

Sty Ht: 1T - ONE/3 QTRS

(Liv) Units: 1 Total: 1

Foundation: CONCRETE

Frame: WOOD

Prime Wall: CLAPBOARD

Sec Wall: _____ %

Roof Struct: GABLE

Roof Cover: ASPHALT SH

Color: BROWN

View /Desir: _____

GENERAL INFORMATION

Grade: AVG. (+)

Year Blt: 2008 Eff Yr Blt: _____

Alt LUC: _____ Alt %: _____

Jurisdic: _____ Fact: _____

Const Mod: _____

Lump Sum Adj: _____

ANYTOWN, VT

ParcelID: 230856-000

Pat Acct: 1199

INTERIOR INFORMATION

Avg Ht/FL: STD

Prim Int Wal: DRYWALL

Sec Int Wall: _____ %

Partition: TYPICAL

Prim Floors: HARDWOOD

Sec Floors: MIX AVG 20%

Bsmnt Flr: CONCRETE

Bsmnt Gar: _____

Electric: TYPICAL

Insulation: TYPICAL

Int vs Ext: S

Heat Fuel: GAS

Heat Type: FORCED H/W

Heat Sys: 1

% Heated: 100 % AC: _____

Solar HW: NO Central Vac: NO

% Com Wal _____ % Sprinkled _____

BATH FEATURES

Full Bath: 2 Rating: AVERAGE

A Bath: _____ Rating: _____

3/4 Bath: 1 Rating: AVERAGE

A 3QBth: _____ Rating: _____

1/2 Bath: 1 Rating: AVERAGE

A HBth: _____ Rating: _____

OthrFix: _____ Rating: _____

OTHER FEATURES

Kits: 1 Rating: AVERAGE

A Kits: _____ Rating: _____

Frpl: 1 Rating: AVERAGE

WSFlue: _____ Rating: _____

REMODELING

Exterior: _____

Interior: _____

Additions: _____

Kitchen: _____

Baths: _____

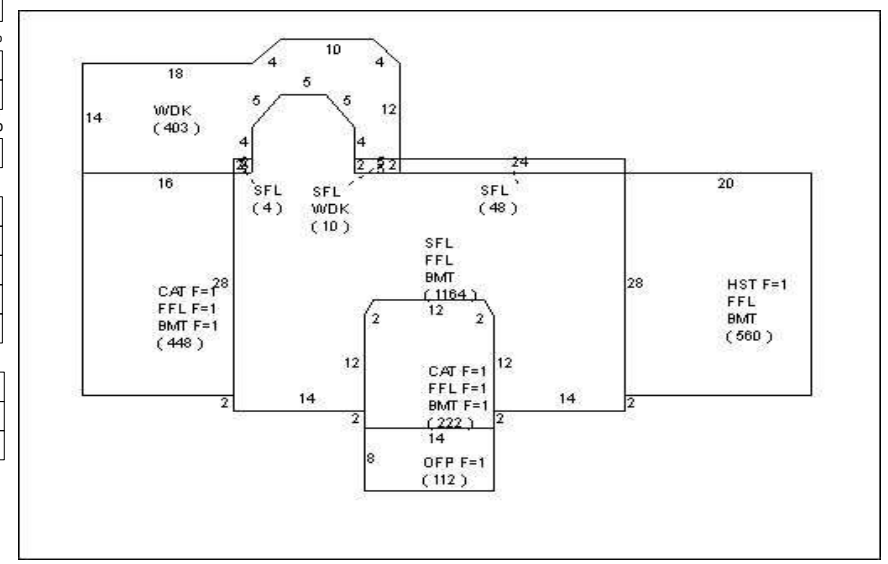
Plumbing: _____

Electric: _____

Heating: _____

General: _____

TAX DISTRICT _____



BUILDING PERMITS CARD 1 of 1 **TOTAL ASSESSED: 531,600**

Date	Number	Descrip	Amount	C/O	Last Visit	Fed Code	F. Descr	Comment
8/10/2007	08-019	NEW DWLG		C	11/13/2008			3745 SQ FT SFR

SUB AREA

Code	Description	Area - SQ	Rate - AV	Undepr Value	
BMT	BASEMENT	2,394	16.380	39,210	
FFL	1ST FLOOR	2,394	81.890	196,048	
SFL	2ND FLOOR	1,226	81.890	100,399	
CAT	CATH CEILING	670	16.380	10,973	
WDK	WOOD DECK	413	15.640	6,459	
HST	HALF STORY	336	81.890	27,515	
Net Sketched Area:		7,545	Total:	382,438	
Size Ad	3956.0000	Gross Area	7769	FinArea	3956

CALC SUMMARY

Basic \$ / SQ:	90.00
Size Adj.:	0.87639028
Const Adj.:	1.03823996
Adj \$ / SQ:	81.891
Grade Factor:	1.10
Other Features:	23400
NBHD Inf:	1.00000000
NBHD Mod:	
LUC Factor:	1.00
Adj Total:	446422
Depreciation:	34821
Depreciated Total	411601
Juris. Factor	
Special Features:	0
Final Total:	411600

RES BREAKDOWN

No	Unit	RMS	BRS	FL
1		8	4	

SUB AREA DETAIL

Sub Area	% Usbl	Descrip	% Type	Qu	# Ten

COMMENTS

DEERFIELD DRIVE

230418 000
MBL SUB

1 of 1 COMMERCIAL
CARD ANYTOWN, VT

APPRaised: 694,100 / 694,100
USE VALUE: 694,100 / 694,100
ASSESSed: 694,100 / 694,100



PROPERTY LOCATION

Table with columns: No, Alt No, Direction/Street/City. Row 1: 144, MAIN STREET, LUDLOW

OWNERSHIP

Table with columns: Owner 1-3, Street 1-2, Town/City, State/Province, Postal, Own Occ, Type. Row 1: 146 MAIN STREET LLC, LUDLOW, VT, 05149, CORPOR

PREVIOUS OWNER

Table with columns: Owner 1-2, Street 1, Town/City, State/Province, Postal. Row 1: GAINARD - RICHARD C, 144 MAIN STREET, LUDLOW, VT, 05149

NARRATIVE DESCRIPTION

This parcel contains .25 ACRES of land mainly classified as RESD 1 with a COMM BLOCK Building built about 1900, having primarily BRICK Exterior and 9640 Square Feet, with 6 Units, 3 Baths, 1 3/4 Bath, 0 HalfBath, 12 Rooms, and 5 Bdrms.

OTHER ASSESSMENTS

Table with columns: Code, Descrip/No, Amount, Com. Int. (Empty table)

PROPERTY FACTORS

Table with columns: Item, Code, Description, %, Item, Code, Description. Includes rows for water, Sewer, Electrici, Exmpt, Census, Flood Haz, D T TOWN 100 Topo, s V VILLAGE 100 Street, t Gas.

LAND SECTION (First 7 lines only)

Table with columns: Use Code, Description, LUC Fact, No of Units, Depth / PriceUnits, Unit Type, Land Type, LT Factor, Base Value, Unit Price, Adj, Neigh, Neigh Infl, Neigh Mod, Infl 1, %, Infl 2, %, Infl 3, %, Appraised Value, Alt Class, %, Spec Land, J Code, Fact, Use Value, Notes. Row 1: 10, RESD 1, 0.25, SITE ACRE, SITE, 0.220,000, 3.10 CD, 170,500, 41, 0, 170,500

IN PROCESS APPRAISAL SUMMARY

Table with columns: Use Code, Land Size, Building Value, Yard Items, Land Value, Total Value. Row 1: 10, 0.250, 174,530, 170,500, 345,030. Row 2: 41, 0.000, 349,070, 349,070. Summary rows for Total Card, Total Parcel, Source, Total Value per SQ unit /Card, /Parcel.

PREVIOUS ASSESSMENT

Table with columns: Tax Yr, Use, Cat, Bldg Value, Yrd Items, Land Size, Land Value, Total Value, Asses'd Value, Notes, Date. Rows from 2013 to 2020.

SALES INFORMATION

Table with columns: Grantor, Legal Ref, Type, Date, Sale Code, Sale Price, V, Tst, Verif, Notes. Rows for GAINARD, RICHAR and DJS PROPERTY LL.

BUILDING PERMITS

Table with columns: Date, Number, Descrip, Amount, C/O, Last Visit, Fed Code, F. Descrip, Comment. Row 1: 3/5/2020, 2020-56, EXT REPA, C, EXT BRK REPAIR

ACTIVITY INFORMATION

Table with columns: Date, Result, By, Name. Rows: 11/1/2011 MEASURED 8 TT, 4/12/2005 INSPECTED 1 NEMC, 2/9/2005 MEASURED 1 NEMC

Sign: VERIFICATION OF VISIT NOT DATA

Total AC/HA: 0.25000 Total SF/SM: 10890 Parcel LUC: 10 RESD 1 Prime NB Desc COMM DWNTWN Total: 170,500 Spl Credit Total: 170,500

EXTERIOR INFORMATION

Type:	62	- COMM BLOCK
Sty Ht:	3	- THREE STY
(Liv) Units:	6	Total: 6
Foundation:	3	- MASONRY
Frame:	1	- WOOD
Prime Wall:	7	- BRICK
Sec Wall:		
Roof Struct:	4	- FLAT
Roof Cover:	1	- ASPHALT SH
Color:	BRICK	
View / Desir:		

GENERAL INFORMATION

Grade:	C	- AVERAGE	
Year Blt:	1900	Eff Yr Blt:	
Alt LUC:	41	Alt %:	67
Jurisdic:		Fact:	
Const Mod:			
Lump Sum Adj:			

INTERIOR INFORMATION

Avg Ht/FL:	STD		
Prim Int Wal:	1	- DRYWALL	
Sec Int Wall:	2	- PLASTER	30 %
Partition:	T	- TYPICAL	
Prim Floors:	4	- CARPET	
Sec Floors:			
Bsmnt Flr:	13	- EARTH	
Subfloor:			
Bsmnt Gar:			
Electric:	3	- TYPICAL	
Insulation:	2	- TYPICAL	
Int vs Ext:	S		
Heat Fuel:	1	- OIL	
Heat Type:	3	- FORCED H/W	
# Heat Sys:	2		
% Heated:	100	% AC:	33
Solar HW:	NO	Central Vac:	NO
% Com Wal:		% Sprinkled:	

MOBILE HOME**SPEC FEATURES/YARD ITEMS**

		Make:	Model:	Serial #	Year:	Color:												
PARCEL ID 230418-000																		
Code	Description	A	Y/S	Qty	Size/Dim	Qual	Con	Year	Unit Price	D/S	Dep	LUC	Fact	NB Fa	Appr Value	JCod	JFact	Juris. Value
82	FREEZER	M	S	1	6X6	C	AV	1900	99.00	T	75	10			900			900
81	COOLER	M	S	1	8X10	C	AV	1900	59.81	T	75	10			1,200			1,200
81	COOLER	M	S	1	4X6	C	AV	1900	87.00	T	75	10			500			500

More:	N	Total Yard Items:		Total Special Features:	2,600	Total:	2,600
-------	---	-------------------	--	-------------------------	-------	--------	-------

BATH FEATURES

Full Bath:	3	Rating:	AVERAGE
A Bath:		Rating:	
3/4 Bath:	1	Rating:	AVERAGE
A 3QBth:		Rating:	
1/2 Bath:		Rating:	
A HBth:		Rating:	
OthrFix:	7	Rating:	AVERAGE

OTHER FEATURES

Kits:	3	Rating:	AVERAGE
A Kits:	1	Rating:	GOOD
Frpl:		Rating:	
WSFlue:		Rating:	

CONDO INFORMATION

Location:	
Total Units:	
Floor:	
% Own:	
Name:	

DEPRECIATION

Phys Cond:	AV	- Average	40	%
Functional:	U	- UPPER FLS	10	%
Economic:				%
Special:				%
Override:				%
Total:			46	%

CALC SUMMARY

Basic \$ / SQ:	75.00
Size Adj.:	0.84908837
Const Adj.:	1.01899219
Adj \$ / SQ:	64.891
Other Features:	36938
Grade Factor:	1.00
NBHD Inf:	1.00000000
NBHD Mod:	
LUC Factor:	1.00
Adj Total:	964881
Depreciation:	443845
Depreciated Total:	521036

COMMENTS

OWNER OCC 1 APT; REST & APTS; REST CAP =150; OTF = 3 TOILETS, 3 SINKS, 1 URINAL; TFL FORMER GYM, UNUSED= 3 SHWR, 3 TOILETS, 1 URINAL & 3 SINKS - ALL IN POOR COND..

RESIDENTIAL GRID

1st Res Grid	Desc:	Line 1	# Units	2								
Level	FY	LR	DR	D	K	FR	RR	BR	FB	HB	L	O
Other												
Upper												
Lvl 2												
Lvl 1												
Lower												
Totals	RM	S	12	BR	S	5	Bath	S	3	HB		

REMODELING

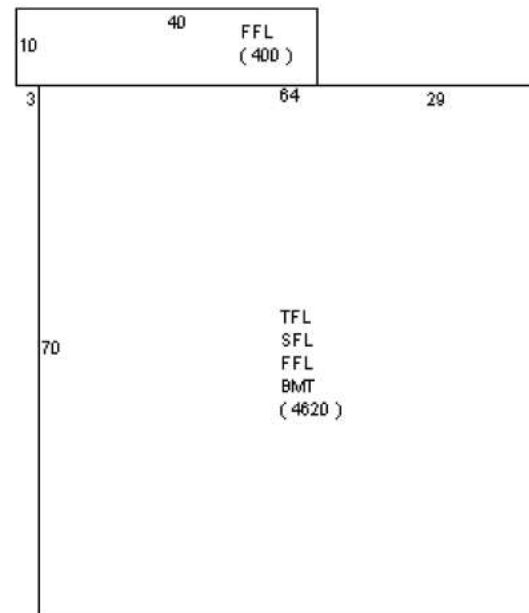
Exterior:	
Interior:	
Additions:	
Kitchen:	
Baths:	
Plumbing:	
Electric:	
Heating:	
General:	

RES BREAKDOWN

No Unit	RMS	BRS	FL
2	4	2	2
1	3	1	2
1	1	0	1
Totals			
4	12	5	

COMPARABLE SALES

Rate	Parcel ID	Typ	Date	Sale Price
WtAv\$/SQ:	AvRate:	Ind.Val		
Juris. Factor:		Before Depr: 64.89		
Special Features: 2600		Val/Su Net: 27.73		
Final Total: 523600		Val/Su SzAd 36.72		

SKETCH**SUB AREA**

Code	Description	Area - SQ	Rate - AV	Undepr Value	
FFL	1ST FLOOR	5,020	71.380	358,329	
BMT	BASEMENT	4,620	12.980	59,959	
SFL	2ND FLOOR	4,620	71.380	329,776	
TFL	3RD FLOOR	4,620	38.930	179,878	
Net Sketched Area:		18,880	Total:	927,942	
Size Ad	14260	Gross Area	18880	FinArea	9640

SUB AREA DETAIL

Sub Area	% Usbl	Descrip	% Type	Qu #	Ten
FFL	100	RST	100	A	
SFL	100	APT	100	A	4
TFL	100	UNF	100	A	1

IMAGE**AssessPro Patriot Properties, Inc**

230418 000
MBL SUB

1 of 1 COMMERCIAL
CARD ANYTOWN, VT

APPRAISED: 694,100
USE VALUE: 694,100
ASSESSED: 694,100

PROPERTY LOCATION

Table with 3 columns: No, Alt No, Direction/Street/City. Row 1: 144, MAIN STREET, LUDLOW

OWNERSHIP

Table with 2 columns: Owner, Address. Owners 1-3 listed with address 146 MAIN STREET APT 1, Ludlow VT.

PREVIOUS OWNER

Table with 2 columns: Owner, Address. Owner 1: GAIGNARD - RICHARD C, 144 MAIN STREET, Ludlow VT.

NARRATIVE DESCRIPTION

This parcel contains .25 ACRES of land mainly classified as RESD 1 with a COMM BLOCK Building built about 1900, having primarily BRICK Exterior and 9640 Square Feet, with 6 Units, 3 Baths, 1 3/4 Bath, 0 HalfBath, 12 Rooms, and 5 Bdrms.

OTHER ASSESSMENTS

Table with 4 columns: Code, Description/No, Amount, Com. Int. Shows various assessment codes and amounts.

PROPERTY FACTORS

Table with 7 columns: Item, Code, Description, %, Item, Code, Description. Lists factors like water, sewer, electricity, flood hazard, etc.

LAND SECTION

Table with 23 columns: Use Code, Description, LUC Fact, No of Units, Depth / PriceUnits, Unit Type, Land Type, LT Factor, Base Value, Unit Price, Adj, Neigh, Neigh Infl, Neigh Mod, Infl 1 %, Infl 2 %, Infl 3 %, Appraised Value, Alt Class %, Spec Land, J Code, Fact, Use Value, Notes.

IN PROCESS APPRAISAL SUMMARY

Table with 6 columns: Use Code, Land Size, Building Value, Yard Items, Land Value, Total Value. Shows values for use codes 10 and 41, and totals for card and parcel.

PREVIOUS ASSESSMENT

Table with 10 columns: Tax Yr, Use, Cat, Bldg Value, Yrd Items, Land Size, Land Value, Total Value, Asses'd Value, Notes, Date. Shows assessment history from 2016 to 2020.

BUILDING PERMITS

Table with 10 columns: Date, Number, Descrip, Amount, C/O, Last Visit, Fed Code, F. Descrip, Comment. Shows a permit for EXT BRK REPAIR on 3/5/2020.

SALES INFORMATION

Table with 10 columns: Grantor, Legal Ref, Type, Date, Sale Code, Sale Price, V, Tst, Verif, Notes. Shows sales to GAIGNARD, RICHARD and DJS PROPERTY LL.

INCOME INFORMATION

Table with 9 columns: Type, Description, Flr, Qty, Leased Area, Ten, Rent \$, Ovr Rent, Econ Inc. Shows income details for APT and RST units.

Summary table for income and vacancy: Gross Income 106,720, Vacancy/DL 10,672, Net Income 60,510, Final Val Card 636,900, etc.

Legal Description: MAIN STREET 144 LODGING/BUSINESS; INCL LOT 230419-000. Lot Size: Total Land: 0.25, Land Unit Type: AC.

User Acct: 363-112-11024. GIS Ref. Insp Date.

Parcel ID: 230418-000. PRINT Date/Time: 03/12/21 09:53:36. LAST REV Date/Time: 03/12/21 09:51:36. apro 1078.

PAT ACCT.

!1078!

ACTIVITY INFORMATION

Table with 5 columns: Date, Result, By, Name. Shows activity records: 11/1/2011 MEASURED, 4/12/2005 INSPECTED, 2/9/2005 MEASURED.

Sign: VERIFICATION OF VISIT NOT DATA

Patriot Properties Inc. logo with a star and text: USER DEFINED, Prior Id # 1-3, ASR Map: 23-04-18-0, Fact Dist, Reval Dist, Year, Land Reason, Bld Reason, Civil District, Ratio.

ANYTOWN, VT

Quick Info (Summary Data - may not be Complete Representation of Property)

Parcel: 230856-000 **Location:** 73 DEERFIELD DR **Owner:** BAUMGARTEN, BRIAN **LUC:** 10
Account: 1199 **User Acct:** 363-112-11149 **Owner Address:** 943 DURHAM ROAD EAST MEADOW, NY 11554

Parcel Values
Total: 531600 **Land:** 120000 **Land Area:** 1 **Building:** 411600 **Other:** 0

Sale Date: 10/9/2020 **Sale Price:** 635000 **Legal Ref:** 435-085 **Seller:** GRAVES, MATTHEW

Sales Information

Book and Page	Instrument Type	Date	Price	Grantor
435 085		10/9/2020	\$635,000	GRAVES, MATTHEW
332 263		6/15/2009	\$	GRAVES, MATTHEW

Permit Date: 8/10/2007 **Number:** 08-019 **Description:** NEW DWLG **Amount:**

Building Type: CONTEMPORY	Year Built: 2008	Grade: AVG. (+)	Condition: Average
Finished Area: 3956	Heat Fuel: GAS	Heat Type: FORCED H/W	% Air Conditioned:
Gross Area: 7769	Fireplaces: 1	Exterior Wall: CLAPBOARD	Bsmnt Garage:

Sub Areas

Area	% Usable	Alt Type	% Alt Type
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of Units: 1 **# of Rooms:** 8 **# of Bedrooms:** 4 **Full Baths:** 2 **3/4 Baths:** 1 **1/2 Baths:** 1

Yard Item(s)

Description	Quantity	Size	Year	Condition	Quality
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Building Values
Total: 531600 **Land:** 120000 **Land Area:** 1 **Building:** 411600 **Other:** 0

Building Areas

Area	Code	Total Sketched Area	Total Finished Area
BASEMENT	BMT	2394	
CATH CEILING	CAT	670	
1ST FLOOR	FFL	2394	2394
HALF STORY	HST	560	336
OPEN PORCH	OFP	112	
2ND FLOOR	SFL	1226	1226
WOOD DECK	WDK	413	

Sketch	Image

Disclaimer: This information is believed to be correct but it is subject to be changed and is not warranted.

New England Municipal Consultants Vermont AssessPro Client List

New England Municipal Consultants Vermont AssessPro Client List						
						Ongoing Contracts
<u>MUNICIPALITY</u>	<u>CLIENT CONTACT</u>	<u>TELEPHONE</u>	<u>PARCELS</u>	<u>SOFTWARE</u>	<u>REAPPRAISAL DATE (S)</u>	<u>Assessor/Consultant</u>
Barnard, VT	Board of Listers - Richard Lancaster	802-234-9574	900	AssessPro	2019	Consultant
Barton, VT	Board of Listers - Allison Lyon	802-526-6222	1,600	AssessPro	2006, 2012	
Burke, VT	Assessor's Office - William Krajieski	802-467-3717	1,145	AssessPro	2006, 2012, 2015	Assessor
Burlington, VT	Assessor's Office - John Vickery	802 865-7114	12,000	AssessPro	consultant	
Castelton, VT	Assessor's Office - MJ Teetor	802-754-2266	2,500	AssessPro	2004, 2006, 2015	
Coventry, VT	Assessor's Office - Kate Fletcher	802-468-5394	700	AssessPro	2021	Assessor
Concord, VT	Assessor's Office - William Krajieski	802-695-2220	1,030	AssessPro	2005, 2012, 2019	Assessor
Derby, VT	Board of Listers - Sue Best	802-766-2012	2,500	AssessPro	2007, 2020	
Grafton, VT	Board of Listers - Nancy Merrill	802-843-2426	650	AssessPro	2004, 2009, 2021	
Hardwick, VT	Assessor's Office - William Krajieski	802-472-6120	1,484	AssessPro	2006, 2016	Consultant
Jamaica, VT	Board of Listers - Lou Brusio	802-874-4908	1,000	AssessPro	2018	
Jay, VT	Board of Listers - Arlene Abadi	802-988-9615	900	AssessPro	2008, 2015	Consultant
Ludlow, VT	Board of Listers - Margot Martell	802-228-7206	3,600	AssessPro	2006, 2011, 2012, 2021	Consultant
Lyndon, VT	Board of Listers - Larry Willey	802-626-5785	2,200	AssessPro	2005, 2011, 2012	Consultant
Manchester, VT	Assessor - Gordon Black	802-362-1313	2,850	AssessPro	2023	
Marshfield, VT	Board of Listers	802-426-3305	800	AssessPro	2022	
Montpelier, VT	Assessor's Office - Steve Trombly	802 223-9502	3,000	AssessPro	2010, 2023	
Newfane, VT	Board of Listers - Doris Knechtel	802-365-7772	1,400	AssessPro	2002, 2007, 2017	
Norwich, VT	Assessor's Office - Spencer Potter	802-649-1419	1,700	AssessPro	2013, 2016	
Roxbury, VT	Board of Listers	802-485-7840	600	AssessPro	2022	
Rutand, VT	Assessor's Office - Barry Keefe	802-773-1800	6,500	AssessPro	consultant	
Springfield, VT	Assessor's Office - Nicole Knight	802-885-2104	4,000	AssessPro	2019	
Salisbury, VT	Board of Listers - Kim Cunningham	802-352-4228	800	AssessPro	2005, 2012	
St Johnsbury, VT	Assessor's Office - William Krajieski	802-748-4272	3,300	AssessPro	2020	Assessor
Troy, VT	Board of Listers	802-988-4785	1,100	AssessPro	2005, 2012	
Walden, VT	Board of Listers	802-563-2220	700	AssessPro	2006, 2014	Consultant
			58,959			



New England Municipal Consultants, Ltd

Serving New England's Town Government

New England Municipal Consultants

- NEMC specializes in small and mid-sized communities with a desire to maintain compliance with State regulators. Our experience in such communities is that the need for information, the fiscal constraints and expertise required is no less than in larger metropolitan areas. The vast majority of Vermont towns fit this description.
- The primary CAMA software is Patriot Properties' AssessPro. AssessPro software is fully compliant with all Vermont statutes. Current use, homestead, SPAN ID's and various other features are included. The software can provide you with internet public access, GIS interfaces, Marshall-Swift cost models and many other valuable tools. NEMC has also worked with ProVal and the State CAMA system (Micro Solve).
- Specific reports are easily constructed to provide you and your community with the information needed and the format needed.
- We provide highly qualified listers and appraisers for each contract. We feel strongly that providing consistent and quality data collection is the key to compliance and fair taxation.
- Each Vermont client is provided with a full interface with the NEMRC billing and collection system. We maintain a good business relationship with NEMRC to help provide our clients with the best transition from appraisal to grand list.
- With thirty Vermont clients signed in the last 20 years, New England Municipal Consultants has made a commitment to Vermont.
- Available Services
 1. Database setups – we convert your NEMRC files to create the base record in AssessPro.
 2. Data conversion – we use your records to create a “field ready” listing card.
 3. Analysis – we will create a market model for your properties using sales in the community.
 4. Model creation – we can construct residential and commercial valuation models utilizing the cost, market and income approaches.
 5. Data collection – we use experienced people to collect all possible data. We use good public notification and relation plans to get people aware and as comfortable with the process as possible.
 6. Informal public or grievance hearings – we can participate directly or as a resource for your office.

7. Ongoing maintenance programs – we do annual pickups, cyclical inspection programs, annual analysis to assist you in decision making and projection analysis for large projects.

Current Vermont Clients – Reappraisal Year and Software

Newfane (2002) (2007) (2017) - AssessPro

Proctor (2003) (2007) - AssessPro

Castleton (2004) (2006) (2015) - AssessPro

Grafton (2004) (2009) (2021) - AssessPro

Lyndon (2005) (2011) - AssessPro

Ludlow (2005) (2011) (2012) (2021) - AssessPro

Troy (2005) (2012) - AssessPro

Barton (2005) (2012) - AssessPro

Salisbury (2005) (2012) - AssessPro

Burke (2006) (2015) - AssessPro

Hardwick (2006) (2016) - AssessPro

Concord (2006) (2012) (2019) - AssessPro

Walden (2006) (2013) - AssessPro

Rutland (2006) - AssessPro

Derby (2007) (2020) - AssessPro

West Rutland (2008) – AssessPro

Eden (2008) - ProVal

Brandon (2008) – VT CAMA

Plymouth (2009) - ProVal

Jay (2009) (2015) - AssessPro

Pittsfield (2009) – VT CAMA

Montpelier (2010) (2023)– AssessPro

West Windsor (2013) – VT CAMA

Norwich (2013) – AssessPro

Hubbardton (2016) – Avitar

Springfield (2018) – AssessPro

Jamaica (2018) – AssessPro

St Johnsbury (2020) - AssessPro

Barnard (2019) – AssessPro

Coventry (2021) – AssessPro

Manchester (2023) – AssessPro

Roxbury (2022) – AssessPro

Marshfield (2022) - AssessPro

NEMC also provides contract assessing services in Ludlow, Burke, Jay, St. Johnsbury, Hardwick, Coventry, Concord and Walden.

AssessPro is also installed as the CAMA provider for the City of Burlington. Patriot Properties services Burlington directly.



New England Municipal Consultants, Ltd

Serving New England's Town Government

William J. Krajeski

Business/Assessment Experience

2001 to Present

New England Municipal Consultants, Ltd
Lyndon Center, Vermont
Title: President/Owner

New England Municipal Consultants, Ltd was formed to provide services to small New England towns. The initial focus of the company has been to provide property reappraisal and contract assessing services. Working in partnership with Patriot Properties, Inc., NEMC provides all valuation field services for new CAMA installations projects in Vermont, New Hampshire and Maine. Patriot supplies CAMA software and technical support to all clients. NEMC provides ongoing assessment and valuation support.

1980 to Present

Appraisal Consultant
Town of Groveland, Massachusetts

1999-2002

Patriot Properties, Inc
Lynn, Massachusetts
Title: Vice President

- National Client Installations/Consulting
- Customer Service and Support
- Contract Administration

Patriot Properties, Inc. is a developer and seller of CAMA software. My primary function was training and installation of software systems nationally. I supervised the successful installation of the assessment software in Davidson County (Nashville), Tennessee and Mecklenburg County (Charlotte), North Carolina. The tasks included the training of staffs exceeding fifty employees in all functions of the software, solving complex interface issues with legacy computer systems and providing analytical training and advise on the achievement of statutory and equitable assessment levels.

1989-1999

Town of Andover
Andover, MA
Title: Chief Assessor

- Responsible of installation of two CAMA systems
- Supervised 4 complete revaluations
- Completed the annual assessment of over 1 billion dollars of commercial property
- Lead appraiser for all appeal work

I served as both Chief Assessor and a member of the Board of Assessors. I was responsible for the annual completion of a property roll exceeding three billion dollars. I acted as the

primary appraiser for all property and was qualified before the Appellate Tax Board to defend the values. As the Chief Assessor, I was required to develop public relations programs, present the annual valuation figures to the Board of Selectmen for the classification hearing process, develop an annual budget and generally act as an advisor to the Town Manager and other town boards as required.

1986-1989

City of Methuen

Methuen, MA

Title: Municipal Appraiser

- Responsible of installation of CAMA system
- Supervised 2 complete revaluations
- Lead appraiser for all appeal work

1985-1986

City of Salem

Salem, MA

Title: Chief Assessor

- Responsible of installation of CAMA system
- Supervised 1 complete revaluation
- Completed the assessment of all commercial property
- Lead appraiser for all appeal work

1983-1985

City of Haverhill

Haverhill, MA

Title: Assessor

- Responsible of installation of CAMA system
- Supervised 1 complete revaluation
- Completed the assessment of all commercial property
- Lead appraiser for all appeal work

1980-1983

Town of Danvers

Danvers, MA

Title: Assistant Assessor

- Responsible of installation of CAMA system
- Supervised 1 complete revaluation

1976-1980

MMC, Inc (now Vision Appraisal)

Chelmsford, MA

Title: Project Supervisor

- Supervised over 20 complete revaluations

Appraisal Education

IAAO Courses

Fundamentals of Real Property Appraisal (Course 1)
Income Approach to Valuation (Course 2)
Income Approach to Valuation II (Course 202)
Industrial Property Appraisal (Course 207)
Mass Appraisal of Residential Property (Course 301)
Mass Appraisal of Income Producing Property (Course 302)
CAMA Valuation Model Building (Course 305)
MRA for Real Property Valuation (Course 604)
Valuing Property Affected by Environmental Contamination (Course 628)
Personal Property Valuation (Course 5)
Residential Modeling Concepts (Course 311)
Income Approach to Valuation II (Course 112 - revised)
Standards of Practice and Professional Ethics (Course 151)

Appraisal Institute Courses

Appraising Manufactured Housing
USPAP (2011)

Professional Accomplishments

Past President of the Massachusetts Chapter of the IAAO (1997-1998)
Past President of the Essex County Assessors Association (1985-1986)

Appraisal Supervisor in Vermont

Professional Affiliations

IAAO
Vermont Assessors and Listers Association

Contact Information

Mail	NEMC P.O. Box 372 Lyndon Center, VT 05852
Cell	(603) 475-9991
E-Mail	bill@nemcvt.net



City of Barre, Vermont
"Granite Center of the World"

**ACTION ITEM BRIEFING MEMO
 CITY COUNCIL AGENDA ITEM
 CITY COUNCIL AGENDA: 06-22-21**

Consent Item No.: 3. G Discussion Item No. _____ Action Item No. _____

AGENDA ITEM DESCRIPTION:

Ratify Manager's Execution FY22 Fuel Oil and Propane Contracts

SUBJECT: FY22 Fuel Oil and Propane Contracts

SUBMITTING DEPARTMENT or PERSON: City Manager

STAFF RECCOMENDATION: Ratify FY22 Fuel Oil (Dead River Co.) and Propane (Irving) Contracts, dated 6/16/21

STRATEGIC OUTCOME/PRIOR ACTION:

Provides firm, fixed unit pricing and budget amounts for FY22 General Fund, Water and Wastewater Enterprise Funds

EXPENDITURE REQUIRED:

Estimated FY22 amounts: Fuel Oil: \$163,000+/- Propane: \$44,000+/-

FUNDING SOURCE(S): FY22 General Fund, Water and Wastewater Enterprise Funds

LEGAL AUTHORITY/REQUIREMENTS:

Charter; City Procurement Policy, and March 23, 2021 Consent Agenda Pre-Authorization to Accept FY22 Fuels Quotes (Manager)

BACKGROUND/SUPPLEMENTAL INFORMATION:

	<u>Oil</u>	<u>Propane</u>
FY22 Contract Unit Price:	\$2.40	\$1.45
FY22 Budget Unit Price:	\$2.25	\$1.40
10 Year Historical Average	\$2.49	\$1.38
7 Year Historical Average	\$2.17	\$1.23

LINK(S): None

ATTACHMENTS: Executed Fuel Oil and Propane Contracts

INTERESTED/AFFECTED PARTIES: City Council, Department Heads, Taxpayers

RECOMMENDED ACTION/MOTION:

"Ratify FY22 Fuel Oil and Propane Contracts as executed by the City Manager on 6/16/21"

**Irving Energy
Commercial Fixed Price Supply Agreement**

SELLER - Irving Energy ("Irving")
190 Commerce Way
Portsmouth, NH 03801

PURCHASER - City of Barre ("Customer")
6 North Main St Suite 2 Acct #: 707115
Barre, VT
Delivery Location: all
Contact: Steven Mackenzie
Email: manager@barrecity.org
Phone: 802-476-6245 Fax:

Contact: Tara Frost Email: cpp@irvingoil.com
Phone: 1-603-559-8834 Fax: 1-888-235-1444

CONTRACT PRICE EFFECTIVE DATE: July 1, 2021

In consideration of the mutual covenants and agreements hereinafter set forth, Highlands Fuel Delivery, LLC (dba Irving Energy) ("Irving") and Customer, intending to be legally bound, agree as follows (the "Agreement"). Irving agrees to sell and deliver to Customer and Customer agrees to purchase and accept delivery from Irving at Customer's delivery location(s) stated below (the "Delivery Location(s)"), the volumes (collectively the "Total Product Volume") of petroleum products stated below (the "Product"). The price applicable to the Total Product Volume shall be the Contract Price per gallon (the "Contract Price") stated below. The Contract Price is exclusive of Taxes and Fees (as designed in Section 1 of the attached General Terms and Conditions, which Taxes and Fees shall be paid by the Customer).

PRODUCT:	60 - Propane
TOTAL PRODUCT VOLUME (GAL.):	31,000
CONTRACT PRICE (PER GAL.):***	\$1.446
PAYMENT TERMS:	Net 30 (payment due 30 days from invoice date)

***This price is only guaranteed if the Customer accepts this Agreement (as detailed below) by 11:59 P.M. EST on **June 16, 2021**
If Irving receives Customer's accepted Agreement after that time, Irving may (but shall not be required to) accept this Agreement.

Account Name	Account #	Gallons by Account	Product Code	Delivery Location
City of Barre Sewer	2222145	0	60	all
City of Barre Water	2222153	0	60	all
City of Barre	707082	0	60	all
City of Barre	707107	0	60	all
City of Barre	707123	0	60	all
0	0	0		0
0	0	0		0
0	0	0		0
0	0	0		0
0	0	0		0
0	0	0		0
0	0	0		0
0	0	0		0
0	0	0		0
0	0	0		0
0	0	0		0
0	0	0		0

Account Name	Account #	Gallons by Account	Product Code	Delivery Location
0	0	0		0
0	0	0		0
0	0	0		0
0	0	0		0
0	0	0		0
0	0	0		0
0	0	0		0
0	0	0		0
0	0	0		0
0	0	0		0
0	0	0		0
0	0	0		0
0	0	0		0
0	0	0		0
0	0	0		0
0	0	0		0

Additional Customer Accounts (if any) shall be noted by an incorporated written Attachment B to this Agreement. The following table represents Customer's good faith estimate as to its monthly Product lifting schedule:

Total Gallons	Jul-21	Aug-21	Sep-21	Oct-21	Nov-21	Dec-21	Jan-22	Feb-22	Mar-22	Apr-22	May-22	Jun-22
31,000	93	164	736	2,009	3,587	4,920	5,979	5,075	4,414	2,737	1,169	415

This agreement shall be deemed finalized and binding only after this Agreement has been accepted by Customer and Irving (either electronically or physically, as provided below) and customer successfully completes Irving's credit approval process. This Contract Price will be effective as of the Contract Price Effective Date above and shall expire on June 30, 2022 or when the Total Product Volume has been delivered, whichever comes first ("the Pricing Term"). This Agreement expressly includes by reference the General Terms and Conditions attached hereto as Attachment A and (if applicable) Attachment B. **If this Agreement was provided by Irving to Customer by fax.** Customer may accept this Agreement by physically signing below and returning it to Irving by fax, and Irving's acceptance shall be shown by Irving physically signing below and transmitting the fully signed agreement to Customer at the Customer's fax or e-mail address noted above. **If this Agreement has been provided to Customer by e-mail from Irving,** it may be accepted by Customer electronically in accordance with directions set forth in Irving's e-mail, with no physical signature required, and may be accepted by Irving in a subsequent e-mail to Customer.

Irving Energy

City of Barre

By:

By (Required):

Steven E. Mackenzie
(Signature)

Printed Name:

Printed Name (Required):

Steven E. Mackenzie

Title:

CityManager

Date:

Date (Required):

Jun 16 2021 16:42 PDT

For Internal Use Only	TC1: 0	Plan Code: UC21 12062	MD	Purchase: P	Contr #: GB00707115-60
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Dead River Company

2300 Dartmouth College Hwy PO Box 458 North Haverhill, NH 03774

1-800-788-3002

Program Terms

Account Number	4416894	Plan	Trans Fixed Price Commercial Heating Oil
Confirmation Number	711415	Rate Per Gallon	\$2.4000
Purchaser Name and Delivery Address(es)	City of Barre - BCS Dept Various Locations	Gallons Covered	68000 gallons
Authorization Date	06/16/2021	Downside Protection Fee	N/A
Effective Start Date	07/01/2021	Total Program Cost	\$163,200.00
End Date	06/30/2022	Total Amount Paid	\$0.00

Acct # 4321902

Service Plan Chosen: None for \$0.00

Terms & Conditions

Contract Terms Commercial Fixed

This Contract must be signed and returned by 2:00PM to guarantee the quoted fixed price shown above.

This Contract ("Contract") provides that Dead River Company ("DRC") will sell, and the above-named customer, heirs and/or assignees ("You") will buy exclusively from DRC, the gallons of product shown above ("Committed Gallons") for the period shown above ("Contract Period") at the fixed price shown above, including all taxes except sales and use tax, Vermont Weatherization Tax, and Vermont Petroleum Distributor Licensing Fee (PDLF) ("Contract Price"), to be delivered at the following address(es) shown above under the following conditions:

- 1. Payment Terms:** All fuel purchases covered by this Agreement will be paid within 30 days of delivery. Payments shall be made by cash, check, or EFT (not credit card). All gallons delivered will be temperature compensated.
- 2. Requirements Purchase Obligation:** You shall purchase from DRC ALL requirements of the fuel type indicated for the Contract Period, even if the amount of such gallons exceeds the Committed Gallons listed above, and shall not purchase from any other source during such period. The price of any fuel purchased in excess of the Committed Gallons will be DRC's standard daily retail price per gallon in Your area as of the delivery date.
- 3. Payment Terms Service and Equipment:** Charges to your account beyond the fuel charges described above (for example, for service or equipment purchases) shall be paid in full by the due date of the invoice.
- 4. Automatic Delivery:** DRC will deliver to the address(es) listed above automatically, based upon projections calculated from historical consumption and weather. You should notify DRC of any changes in consumption expectations. Automatic delivery will continue after the term of the Contract Period. DRC's failure to automatically deliver does not void any other terms of this Agreement. Also, please keep the path to the fill location clear for DRC's driver.
- 5. Limitation of Liability:** DRC shall not be liable for any indirect or consequential damages whatsoever. Furthermore, DRC shall not be liable for damages incurred as a result of failure or delay in delivery of fuel as a result of circumstances beyond DRC's control, including but not limited to, force majeure, supplier interruptions, government mandated allocation, Your failure to notify DRC of consumption changes, or Your failure to keep the fill location clear.
- 6. New Taxes:** The Contract Price set forth above may be increased by an amount equal to the increment of new taxes imposed on fuel sales not in effect at the time this Agreement was made.
- 7. Termination by DRC:** DRC may terminate this Agreement and pursue legal remedies if You breach this Agreement in any way, including failing to pay for goods and services and/or the Committed Gallons covered by this Agreement, and/or by notifying DRC that you do not intend to fulfill the purchase requirements in paragraph 2, DRC may elect to cease deliveries and pursue damages and/or Liquidated Damages as set forth below.

8. **Damages, and Liquidated Damages:** If You do not make any payment when required or otherwise breach in any way, DRC shall be entitled to damages, reasonable costs of collection or attempted collection, and reasonable attorneys' fees. For instance, if You fail to purchase all of the Committed Gallons from DRC, or if You purchase fuel from another source during the Contract Term, DRC shall be entitled to, at a minimum, Liquidated Damages calculated as follows: (Committed Gallons, minus delivered gallons) times the greater of \$1.00 per gallon, or 50% of the Contract Price per gallon, such amount to be paid within 10 days following end of the Contract Term or the date of Your breach, whichever is earlier. These liquidated damages reasonably approximate actual damages to compensate DRC for costs and risks incurred in securing fuel quantities and prices to satisfy the Committed Gallons. In addition, You shall pay any outstanding amounts for all delivered goods and services.
9. **NOTICE OF PRICE RISK TO CONSUMER:** The fixed price in this Agreement is based upon market conditions prevailing at the time of signing. You understand and agree that the price is fixed for the season regardless of whether market price goes up or down. You are agreeing to all of the Committed Gallons regardless of weather conditions reducing Your fuel requirements.
10. **Fixed Price Contract Compliance:** DRC's performance is secured by fixed price contracts and inventory in compliance with ME - 10 M.R.S.A. 1110(2), NH - R.S.A. §339:79, and VT - 9 V.S.A. §2461(e).
11. **THIS IS A LEGALLY BINDING CONTRACT. PLEASE READ CAREFULLY BEFORE SIGNING BELOW. THIS AGREEMENT IS NOT BINDING UNLESS A SIGNED COPY IS RECEIVED BY DRC BY THE DEADLINE SPECIFIED ABOVE.**

Authorized Signature: Steven E. Mackenzie Date: Jun 16 2021

Dead River Signature: David R. Luce-WCAM Date: 6/16/2021

Verification Code: 1660008281 Account Number: 4416894 Confirmation Number: 711415



City of Barre, Vermont

"Granite Center of the World"

**ACTION ITEM BRIEFING MEMO
CITY COUNCIL AGENDA ITEM
CITY COUNCIL AGENDA: 06-22-21**

Consent Item No.:

AGENDA ITEM DESCRIPTION: Authority to Award City Hall Heat Pump Bid

SUBJECT: Improving work conditions and electrical efficiency of City Hall w/ heat Pumps

SUBMITTING DEPARTMENT or PERSON: DPW and BCS

STAFF RECCOMENDATION: Award to low bidder Alliance Inc.

STRATEGIC OUTCOME/PRIOR ACTION: Improved cooling and shoulder season heating in the Clerk's Office and Finance Dept. Office and cooling for a new server room in the City Hall basement

EXPENDITURE REQUIRED: est. \$31,000 after rebate

FUNDING SOURCE(S): BCS FY 21 appropriation and unexpended FY21 Balance

LEGAL AUTHORITY/REQUIREMENTS: Procurement in accordance with City policy

BACKGROUND/SUPPLEMENTAL INFORMATION: The City currently operates 3 individual window air conditioners for cooling of these offices. There is currently no cooling on the new server room. The installation of an integrated system with 2 elements – a large condenser and package units in the Clerk's and Finance Offices and a separate condenser and unit in the server room. This provides lower electrical demand and consumption, high reliability, better distribution of cool air and offers shoulder season heat capability which will delay boiler startup

LINK(S): none

ATTACHMENTS: City Hall Heat Pumps 4/19/21 author Elijah Morgan, Eng'g Technician

INTERESTED/AFFECTED PARTIES:

RECOMMENDED ACTION/MOTION:

City of Barre

6 North Main St Suite 1
Barre City, Vermont 05641
(802)-476-0250

City Hall Heat Pumps

April 19th, 2021

OVERVIEW

This project proposal is designed to improve the efficiency within the heating system of City Hall. Currently, there is a grant provided from Efficiency Vermont that would provide us with a minimum of \$4,000.00 towards the total cost of this project. This project will help to serve our building by using a cleaner and more efficient energy source.

This project would entail placing a heat pump in the Clerk's office, Accounting, and the projected IT office/server room. Each of these rooms would highly benefit from a fresh air exchange, but they have to be taken out of the quoting due to their inherent expense.

GOALS

1. To decrease the amount of thermal contribution from our steam boilers.
2. Increased indoor air quality.
3. Proper thermal control of the room(s) affected by the heat pump.
4. To decrease the carbon footprint of the City.
5. Effective tie-in with existing thermostats and valves.

SPECIFICATIONS

This project will pertain to City Hall on the second floor.

MILESTONES

Project Identification

There are numerous projects that will be within the capabilities and reach of this grant money. Heat pumps, insulation, pump efficiency, motor efficiency, and a cogen station are some of the ways that we could use this Efficiency Vermont Grant. Heat pumps are the most feasible option for the year 2021.

Project Approval

In the event that a project has been identified by City staff, Efficiency Vermont will be notified as to the specifics of the proposal. From here if it fits within the guidelines of the grant's applicability it will be denied or approved.

Quotes

For this process to work, a minimum of three quotes needs to be provided to Efficiency Vermont for approval and oversight. Here is a list of companies and quotes that we have received from multiple contractors in our local area. These estimates are not including the grant funding.

- Vermont Mechanical
 - Kevin Morrison
 - (800)-862-5900
 - 211 Blair Park Road, Williston, Vermont
- Climate Systems
 - (802)-660-9969
 - Williston, Vermont
- VHV Company
 - (802) 655-8805
 - 16 Tigan St, Winooski, VT 05404
- New England Air
 - Rob Pavalli
- Alliance Mechanical
 - Mark Luman

Conclusion of Quotes

After having VMI, VHV, NEA, and Alliance provide quotes and visit our building for estimates, Alliance has provided us with the most desired quote.

- VMI
 - Kevin Morrison and the VMI team have decided to not provide us with a quote due to their outside work load. They hope to work with us in the future.

-
- Climate Systems,
 - A response was not received in a timely manner.
 - VHV
 - VHV had provided us with a quote that was outside of the price range of this project at a price of \$92,000.
 - New England Air
 - NEA provided us with a quote that was outside of the price range of this project.
 - Note, the revised second quote was high at \$60,000 we would have to phase out this project if we went with their quote.
 - Alliance
 - Alliance has provided us with a quote that is satisfactory to our needs and goals at \$34,000.

We have decided to go with the quote from Mark Luman at Alliance that will provide us with the following;

1. Furnish and install (1) Carrier Performance Series 30,000 BTU multi-zone heat pump condensing unit mounted on stand out back of building.
2. Furnish and install (1) Carrier 18,000 BTU ceiling cassette in ceiling of Clerk's Office, and (1) 12,000 BTU high wall head unit in the Accounting Office.
3. Furnish and install condensate piping from ceiling cassette and high wall head unit and daylight on outside the wall. Furnish and install condensate pump on high wall head unit.
4. Furnish and install wired remote control in a central location in the Clerk's Office.
5. Furnish and install (1) Carrier Infinity Series 9,000 BTU condensing unit on stand out back of building.
6. Furnish and install Carrier 9,000 BTU high wall head unit inside IT Room.
7. Furnish and install condensate pump below head unit and pipe to utility sink in hallway.
8. Furnish and install insulated line sets and mini split wire from each condensing unit through cored holes in brick to each indoor unit in the IT Room, Clerk's Office, and Accounting Office.
9. Furnish and install PVC slim duct on the outside wall to hide and protect line sets and wiring.
10. Connect each condensing unit to Alliance Electrical installed electrical disconnects.
11. Pressure test and evacuate each system and add additional refrigerant per manufacturer's specifications.

12. Start and test each system for proper operation and complete necessary startup documentation.

This quote would allow for us to meet if not exceed all of our goals.

CITY OF BARRE FEE SCHEDULE

proposed fee changes for 6/15/21 Council meeting

department	permit/fee/license item	Current Fees/Fines effective 7/1/20	June 2021 proposed changes	Notes
city clerk	vault access fee	\$2/hour	\$4/hour (statute)	
city clerk	animal - chickens/ducks/turkeys/fowl	\$1.50 each	remove	as per ordinance changes
city clerk	animal license - other (cats not licensed)	\$2.50/pound, up to \$12.50 maximum	remove	as per ordinance changes
city clerk	food vending machine (not currently being enforced)	\$35.00	remove	
city clerk	parking permits - day - good for calendar year. Permit fee increases by 2.5% each calendar year, or as changed by the City Council.	\$203.82 price for 2019/\$208.92 price for 2020	\$214.15 price for 2021	doesn't require council approval, as previous council action set the annual escalator percentage
city clerk	parking permits - overnight - good for 6 months (Jan-June or July - Dec) overnight permits good from 6PM - 8 AM weekdays and all day weekends and holidays. Permit fee increases by 2.5% each calendar year, or as changed by City	\$94.56 price for 2019/\$96.93 price for 2020	\$99.35 price for 2021	doesn't require council approval, as previous council action set the annual escalator percentage
city clerk	electric vehicle charging stations	\$1.50/hour; \$0.75/additional hours		consider new rates through ParkMobile and cancel Chargepoint contract
FD/ambulance	Outside details	\$63/hour	\$70/hour	
FD/ambulance	Outside detail with vehicle	\$63/hour plus vehicle charge	\$70/hour plus vehicle charge	
police	traffic violations as per Ordinance Ch. 17 Traffic		As allowed by 23 VSA sec.1008 unless noted otherwise	SEE BELOW
police	Speeding violations of City Ord. Ch. 17 (a) (c) (d): 1-10 MPH over speed limit		\$5.00 per mph over	Multiply Waiver \$ by MPH over limit, then add 15% of fine (rounded up) and a \$47.00 surcharges.
police	Speeding violations of City Ord. Ch. 17 (a) (c) (d): 11-20 MPH over speed limit		\$6.00 per mph over	Multiply Waiver \$ by MPH over limit, then add 15% of fine (rounded up) and a \$47.00 surcharges.
police	Speeding violations of City Ord. Ch. 17 (a) (c) (d): 21-30 MPH over speed limit		\$7.00 per mph over	Multiply Waiver \$ by MPH over limit, then add 15% of fine (rounded up) and a \$47.00 surcharges.
police	Speeding violations of City Ordinance Ch. 17 (b)		\$220	Unreasonable/Unsafe for conditions
police	Outside details	\$63.00/hour	\$70/hour	
police	Outside detail with vehicle	\$68.00/hour plus mileage outside city limits	\$75.00/hour plus mileage outside city limits	
recreation	Rotary Park picnic shelter - per event	\$45.00	\$40.00	large BBQ grill no longer available

NEW

NEW

NEW

NEW

NEW



City of Barre, Vermont

“Granite Center of the World”

ACTION ITEM BRIEFING MEMO
CITY COUNCIL AGENDA ITEM
CITY COUNCIL AGENDA: 06-22-21

Consent Item No.: _____ **Discussion Item No.** _____ **Action Item No.** 9A

AGENDA ITEM DESCRIPTION:

Council approval of Property Tax Due Dates for FY22.

SUBJECT:

Council approval of Property Tax Due Dates for FY22.

SUBMITTING DEPARTMENT/PERSON:

Carol Dawes, clerk/treasurer

STAFF RECCOMENDATION:

Approve setting property tax quarterly due dates as:

- *September 15, 2021 (instead of August 15, 2021)*
- *November 15, 2021 (no change)*
- *February 15, 2022 (no change)*
- *May 16, 2022 (May 15th is a Sunday)*

STRATEGIC OUTCOME/PRIOR ACTION:

Not applicable.

EXPENDITURE REQUIRED:

No additional costs.

FUNDING SOURCE(S):

No additional costs.

LEGAL AUTHORITY/REQUIREMENTS:

Barre City charter Sec. 601. Payment of taxes.

(a) Taxes on real and personal property shall be paid in four (4) equal payments, with one-fourth of the annual tax bill for each taxpayer due and payable on August 15, November 15, February 15, and May 15 of each year to the City Treasurer, unless otherwise changed by the City Council. (Amend. of 9/13/88) (Amend of 5/8/12)

BACKGROUND/SUPPLEMENTAL INFORMATION:

Delay is due to late approval of BUUSD school budget, causing late issuance of the education tax rates by the VT Agency of Education. Adjusting the first quarterly due date

fulfills our requirement to allow at least 30 days between the billing date and first due date.

LINK(S):

Not applicable.

ATTACHMENTS:

None.

INTERESTED/AFFECTED PARTIES:

Barre City taxpayers, Assessor's office, tax collection and delinquent tax collect staff.

RECOMMENDED ACTION/MOTION:

Approve setting the FY21-22 property tax quarterly due dates as:

- *September 15, 2021 (instead of August 15, 2021)*
- *November 15, 2021 (no change)*
- *February 15, 2022 (no change)*
- *May 16, 2022 (May 15th is a Sunday)*



City of Barre, Vermont

“Granite Center of the World”

**ACTION ITEM BRIEFING MEMO
CITY COUNCIL AGENDA ITEM
CITY COUNCIL AGENDA: 06-22-21**

Action Item No.

AGENDA ITEM DESCRIPTION: Authority to Award Paving Bids Camp and Perry Sts.

SUBJECT: Short term paving project bids for Camp and Perry St (different than FY 22-23 Paving program)

SUBMITTING DEPARTMENT or PERSON: DPW, Bill Ahearn

STAFF RECCOMENDATION: Award to low bidder

STRATEGIC OUTCOME/PRIOR ACTION: Paving Camp St and Perry St in a prompt manner

EXPENDITURE REQUIRED:

FUNDING SOURCE(S): Annual Streets Capital appropriation

LEGAL AUTHORITY/REQUIREMENTS: Procurement in accordance with City policy

BACKGROUND/SUPPLEMENTAL INFORMATION: The City sought bids for paving these streets from 4 asphalt paving companies, three of which own asphalt pavement production plants. The four companies were Extreme Excavating, Pike Industries Inc, J Hutchins Inc and FW Whitcomb Inc. The City has used all of these firms for paving operations previously. Omitted from this solicitation because of the exigency was Johnson Paving, who will be included in the FY program solicitation later.

The paving is designed specifically to each street. Camp Street has a 28-foot width from Tremont to just above the Cassie St intersection. This is a slight narrowing of the pavement in the vicinity of three intersections Clifton St, Marcell Ave and Veeder St. Camp St remains at 22-foot width from above Cassie St to the City/Town line. Pavement thicknesses proposed for Camp St are greater than the standard 2.5-inch depth for residential City streets. Based on traffic volumes and loading, a depth of 3.5 inches will be used in the steeper section from Cassie St to Tremont. A 3-inch depth will be used from Cassie St to the City line. Perry Street will receive a standard 2.5-inch depth pavement maintaining the same 26-foot width in place now. The sidewalk extension on Perry St will slightly reduce the travel way on the intersection approach.

LINK(S): none

ATTACHMENTS: bid package and addenda

INTERESTED/AFFECTED PARTIES: Residents, vendor and City staff

RECOMMENDED ACTION/MOTION: Move to authorize award to low bidder as determined at bid opening on June 21, 2021

Summary of Email Correspondences w/Invitation to Bid on original transmittal

June 17 Addenda

Attention potential bidders

Addendum to Barre City request for bids – Paving Camp St and Perry St

The City is:

- 1) waiving the requirement of a bid bond
- 2) revising Camp St pavement type from Cassie St to the City line as follows:

Camp St beginning at the uphill pavement edge to a line 25 feet uphill of the junction of Cassie St with a width of 28 feet and thickness of 3.5 inches, and from a line 25 feet uphill from Cassie St to the City line with a width of 22 feet and thickness of ~~2.5~~ 3 inches.

and

or a 2 lift course with total compacted thickness of 3.5 inches in depth (preferred layers at 2 ½ inch Type 2 Base course and 1 inch Type 4 surface course), or 3 inches in depth (2 inch Type 2 Base Course and 1 inch Type 4 surface course) unless otherwise specified of Bituminous concrete pavement over the streets listed on the following sheet.

Explanation: The City is seeking a most competitive bid which is improved by limiting pavement production to a single base course pavement type for each location. Camp St will be all Type 2 base course as a result of this revision, with a revised thickness of 3 inches from Cassie St to the City line.

Original Transmittal June 10, 2021

Good day (name),

I am writing to ask that you consider submitting a bid for two specific paving jobs in Barre City for completion within the next 6 weeks. Both jobs should be ready for paving shortly after bid opening. The locations are Camp St and Perry St in Barre City

It is a shortened bid period because it is a small specific set of locations. The bid opening is tentatively set for June 21, 2021. I would be proceeding to ask Council approval for award on June 22, 2021. Award could be as early as Thursday 6/24.

The request identifies that street closures will be considered. Perry St can be closed to all but local traffic. Camp St has detours available from Clifton St/Marcell Ave to Tremont St, but requires one way traffic on the remainder.

I will answer any questions submitted with a written reply to all potential bidders on Thursday June 24, 2021 if you have any questions.

William Ahearn P.E.
Director Public Works and Engineering
6 North Main St Suite 1
Barre, VT 05641

(802) 476-0250 office
(802)476-0264 fax

CONTRACT DOCUMENTS
AND
SPECIFICATIONS
FOR
“BITUMINOUS CONCRETE PAVING
Upper Camp and Perry Streets”

INFORMATION FOR BIDDERS

June 2021

CITY OF BARRE, VERMONT

A. RECEIPT OF BIDS

The City of Barre, Vermont will receive bids until 2:00 PM (local time) on Monday June 21, 2021 in the City Manager's Office, City Hall, 6 North Main St. Barre, Vermont. Shortly thereafter at 2:15 PM, they will be publicly opened and read aloud in the City Council Chambers.

B. SCOPE OF THE WORK

The City of Barre will be removing pavement for utility work on Camp St and Perry Streets in the month of June 2021. The scope of work for this contract is finish grading and pavement of 2 lifts of hot mix or warm mix asphalt installed in accordance with the VT Agency of Transportation Standard Specifications for Highway Construction.

1) Pavement Replacement

The Camp St and Perry Streets listed will have the paved surfaces removed/scarified by the City and a suitable sub base material will be installed by the City to approximate grade. A project description for each street is further described as:

- a) Camp St beginning at the uphill pavement edge to a line 25 feet uphill of the junction of Cassie St with a width of 28 feet and thickness of 3.5 inches, and from a line 25 feet uphill from Cassie St to the City line with a width of 22 feet and thickness of 2.5 inches.
- b) Perry St Beginning at a point 50 feet from the edge of Washington St to 135 feet from Washington St with a width of 32 feet and depth of 2.5 inches to the junction of Spaulding St. From that point at the junction of Spaulding St 850 feet to the junction with Hill St at a width of 26 feet (match existing curbs) and depth of 2.5 inches.

In all cases the successful contractor shall be responsible for shaping/grading and properly compacting each street to final grade. All streets will be capped by the Contractor with an application of liquid calcium chloride at a rate of 0.25 gallons per yard prior to paving, if the City elects to include chloride application. (Any needed crushed gravel/asphalt will be provided and hauled by the City of Barre.)

2) Paving

The work will also consist of the Contractor applying a 2-lift course with total compacted thickness to be 2 ½" in depth (preferred layers at 1 ½ inch Type 3 base course and 1 inch Type 4 surface course), or a 2 lift course with total compacted thickness of 3.5 inches in depth (preferred layers at 2 ½ inch Type 2 Base course and 1 inch Type 4 surface course),

unless otherwise specified of Bituminous concrete pavement over the streets listed on the following sheet. All labor, equipment (satisfactory to accomplish the work) and materials (except sub-base materials) needed for this application is to be provided by the Contractor. An optional use of calcium chloride as a compaction aid and subbase binding agent will be assessed by the City for completion in each assignment.

3) This contract is considered a package contract.

C. PREPARATION OF BIDS

Bids will clearly be marked **PAVING BIDS Camp and Perry** and forwarded to Jody Norway, Executive Assistant, City Hall, 6 North Main Street., Ste. 2, Barre, VT. 05641

D. SITE VISIT

Prior to the opening of Bids, it is assumed that each Bidder will have inspected the sites for assignment and become thoroughly familiar with the Contract Documents, existing field conditions and limitations. Failure of a Bidder to review all documents pertinent to the Contract shall in no way relieve any Bidder from the obligation with respect to his/her Bid.

E. AWARD OF CONTRACT

The Contract will be awarded to the lowest responsible and eligible Bidder as determined by the City. The City intends to award a Contract within approximately ten (10) working days after the Bid opening. The City reserves the right to reject any and all proposals or to waive any informality or technicality in any proposal in the best interest of the City.

F. PROPOSAL GUARANTEE OF BID BOND

A CERTIFIED CHECK, CASHIER'S CHECK OR A Bid Bond in the amount of 10% of the project cost as bid shall accompany each bid. The Bid Bond submitted by the successful bidder will be returned upon submittal of the Performance Bond (see G. below) and the Certificate of Insurance. The successful Bidder shall provide the City of Barre with these documents within twenty (20) days of notice of award of the Contract. Proposal Guarantees of all unsuccessful Bidders will be returned approximately thirty (30) days after the opening of the proposals.

G. PERFORMANCE BOND

Performance Bond in the amount of 10% of the project cost will be required of the successful Bidder and paid for by him/her. This Bond shall be presented at the execution of the Contract on appropriate forms provided by the Contractor.

H. CONTRACT TIME

The paving projects listed in this document are intended to be completed by **July 31, 2021**. Failure of the Contractor to commence work within the ten (10) day notification will result in a (\$500.00) five hundred dollar per work-week penalty. Days with inclement weather which prevents paving will not be included after the eighth day of this criteria.

I. **ASPHALT ADJUSTMENTS**

The asphalt price adjustment shall be the same formula as called for in the Vermont State Department of Transportation's contract for Liquid Bituminous Material in effect on the date of this bid.

GENERAL CONDITIONS

I. **GENERAL**

- a) Before commencing work, the Contractor and each of his/her subcontractors if any, shall furnish the City of Barre with a certificate showing that

he/she/they have adequate coverage pertaining to Workmen's Compensation, Public Liability and Property Damage Insurance.

- b) It will be the Contractor's responsibility to make arrangements to visit the site and make his/her own appraisal of the work to be carried out.

II. PREPARATION OF SUB-BASE

It will be the Contractor's responsibility to shape, finish grade and re-compact the sub-base to establish an acceptable road profile and typical cross section.

The centerline road profile will be established from existing curb lines and/or gutter elevations. The Barre City Engineering Department will set control grades on each street and work with the Contractor in establishing these grades.

The roads shall be sloped at a grade of ¼-inch per foot from the centerline to each gutter.

III. PAVING SPECIFICATIONS

All paving will be in accordance with the latest version of the State of Vermont Agency of Transportation Standard Specifications for Construction.

- 1) The Contractor will sweep and apply Emulsified Asphalt (RS-1, RS-1H or CRS-1H) to all existing pavement prior to paving. The rate of application shall be greater than 0.10 gallons per square yard on any milled surface and 0.04 gallons per square yard between asphalt layers
- 2) A 2 foot wide by 1-inch depth cold planed transition strip and butt joint will be created at all intersections of new pavement to existing roads. The cold planed area shall receive emulsion as described in 1) above prior to applying new pavement.
- 3) 2 ½" Pavement Thickness – The types of Bituminous Concrete to be used will be Type III (1/2" aggregate) for the base coat (1 ½" thick compacted). A Type IV (3/8" aggregate) will be used for the surface.
- 4) 3 1/2" Pavement Thickness – (3 ½" Thickness) The types of Bituminous Concrete to be used will be Type II (3/4" aggregate) for the base coat (2 ½"

thick compacted), Type IV (3/8" aggregate) for the finish overlay (1" thick compacted).

IV. ADJUSTMENT OF UTILITIES

It will be the City's responsibility to adjust all utilities (i.e. road boxes, manholes, etc.). **MANHOLES WILL BE ADJUSTED/GRADED BY THE CITY OR ITS AGENT.** When manholes and drainage basins are set to finish grade, it will be the Contractor's responsibility to meet those grades. The contractor is required to provide a taper from the centerline based grades for the street into the drainage structure. The taper shall be two feet wide on each structure parallel to centerline and 18 inches transversely. Failure of the Contractor to meet this requirement will result in the Contractor compensating the City of Barre for the costs associated with adjusting the utility or replacement of the pavement`

(s). **NOTE: MANHOLES, CATCHBASINS, ROADBOXES WILL BE LEFT IN PLACE AND THE CONTRACTOR WILL BE REQUIRED TO WORK AROUND EACH OF THEM.**

V. TRAFFIC CONTROL

It will be the Contractor's responsibility to provide for all necessary traffic control, which consists of but not limited to signs, police officers, etc. and will be considered as a part of the cost per ton bid price. Police officers shall be used at all signalized intersections. Street Closure to through traffic will be considered.

VI. MISCELLANEOUS

The Contractor will be responsible for any clean-up (pertaining to his/her work after each paving job has been completed.

VII. BIDDING

a) **BIDS SHALL BE SUBMITTED AS A PER TON COST FOR THE PAVING OF THE PROJECT INCLUDING ALL ASSIGMENTS. THE BIDS WILL BE FOR ALL THE NECESSARY WORK (LABOR, EQUIPMENT, MATERIALS) REQUIRED TO PREPARE AND PAVE THE STREETS/PROJECTS ACCORDING TO THE SPECIFICATIONS OUTLINED IN THIS DOCUMENT.**

b) **THE COST FOR THE MILLING OF THE TRANSITION STRIPS SHALL BE INCLUDED IN THE UNIT COST OF THE ASPHALT.**

- c) BIDS SHALL BE SUBMITTED AS A COST PER SQUARE YARD FOR CAPPING STREETS WITH LIQUID CALCIUM CHLORIDE AT .25 GALLONS/SQUARE YARD. This is an Option to be exercised at the City's discretion.
- d) THE CITY OF BARRE RESERVES THE RIGHT TO ACCEPT OR REJECT ANY AND ALL BIDS AND TO ACCEPT THE BID DEEMED TO BE IN THE BEST INTEREST OF THE CITY OF BARRE.
- e) THE BIDDERS SHALL USE THE FORM SUPPLIED WITH THIS DOCUMENT FOR BIDDING. NO OTHER FORMS WILL BE ACCEPTED.

VIII. BIDDERS QUALIFICATIONS

- a) Each Bidder must be able to furnish a statement of qualifications listing his/her experience in the type of work included in the project and equipment available for the work contemplated if so required by the City. The City reserves the right to reject any Bid where an investigation of available evidence does not satisfy the City that the Bidder is qualified to properly perform the work.
- b) The Contractor shall supply all equipment, which shall be in conformance with the latest version of the State of Vermont Agency of Transportation Standard Specifications for Construction.

IX. TERMINATION OF CONTRACT

The Contractor may be terminated by the City at any time, upon written notice to the Contractor on a specified date if the Contractor:

- 1) fails to begin work within the specified time (excluding weather days);
- 2) fails to pursue the work in a manner to insure proper completion;
- 3) pursues the work in a manner to render the completed project unsuitable to the City;
- 4) Discontinues work on the project or any assignment.

X. PAYMENT

The Contractor shall be compensated for the work completed at the time of completion of each of the streets/projects.

XI DIGSAFE

THE CONTRACTOR IS RESPONSIBLE FOR CONTACTING DIG SAFE
FOR OTHER THAN CITY-OWNED UTILITIES. (1-888-DIG-SAFE)

**BITUMINOUS CONCRETE PAVIING
BARRE, VERMONT
BID SHEET (1 OF 2)**

The undersigned declares that he/she has carefully examined the Contract Documents and familiarized himself/herself with all conditions, materials, equipment, tools, labor and incidentals necessary to carry out the work as specified in these Contract Documents.

The undersigned hereby agrees to commence work under this Contract and continue with all regularity and dispatch to complete these projects before **July 31, 2021.**

The undersigned proposes to complete all the work in its entirety in accordance with the above understanding at the price as follows:

STREET NAME	Length/Width/Thickness	Sq. Yards (rounded)	Tonnage (rounded)
Camp St. (Tremont to Cassie)	1130/28/3 ½	3490	650
Camp St. (Cassie to City Line)	410/22/2 ½	1010	135
Perry St (between Washington and Spaulding)	85/32/2 ½	305	40
Perry St (Spaulding to Hill St)	850/26/2 ½	2460	325
Incidental Trench Paving (Hill St)	100/8/2 ½	na	12

Thickness= total thickness of New Asphalt in inches

Area in square yards - approximate

All streets will be scarified by the City of Barre Public Works Dept. and a suitable sub-base will be installed by the City. The contractor will be required to shape/grade and compact (static roller) these streets and establish a cross-section slope of 1/4- inch per foot from the center-line to the gutters on each side of centerline prior to paving.

BITUMINOUS CONCRETE PAVIING
BARRE, VERMONT
BID SHEET (2 OF 2)

The grade of asphalt cement used to produce the bituminous concrete pavement shall be PG 58-28.

Emulsified asphalt shall be applied on existing pavement surfaces, between all courses of pavement and on cold planed surfaces at a rate of .02 gal. / square yard.

PAVEMENT BID PRICE AS COST PER TON APPLIED \$ _____

BID PRICE PER SQUARE YARD TO "CAP" STREETS WITH LIQUID CALCIUM CHLORIDE \$ _____

_____ Company Name

_____ Title
Duly Authorized Agent _____
_____ Print Name

Mailing Address: _____

_____ Telephone #

**CONTRACT
PAVEMENT RECLAMATION
AND
BITUMINOUS CONCRETE PAVING
CITY OF BARRE, VERMONT**

This Contract made this ____ day of _____ by and between the City of Barre, Vermont hereinafter called the Owner and _____ with legal address of _____, Vermont and principal place of business at same, hereinafter called the Contractor.

WITNESSETH: That in consideration for payments and agreements hereinafter mentioned to be performed by the Owner, the Contractor agrees to commence and complete the PAVEMENT COLDPLANING and BITUMINOUS CONCRETE PAVING as set forth in the bid documents submitted June 22nd, 2018. The Contractor shall perform all the required work in a workman like manner and provide and furnish all materials, labor, tools, equipment and related services necessary to complete said work in accordance with the conditions set forth in these Contract Documents, which are all part of this Contract.

The City of Barre shall pay the Contractor for paving the following price per ton for the performance of work under this Contract: \$ xx.xx/ per ton.

The City of Barre shall pay the Contractor for asphalt cold planing the following price per square yard for the performance of work under this Contract: \$ N/A/per square yard.

The City of Barre shall pay the Contractor for "capping" the following price per square yard for the performance of work under this Contract: \$x.xx/per square yard, if the option is elected by the City on each assignment.

The City of Barre agrees to pay the Contract in accordance with and subject to the provisions of the Contract Documents.

INWITNESS THEREOF, the parties to these present have executed this Contract on

Contractor's Name

By

Title

City of Barre Steven E. Mackenzie P.E.

City Manager

Title

04/19/2021

To Whom It May Concern:

I'm writing today in order to offer my skills and time by serving on the Public Arts Committee of Barre City.

I'm a new resident of the city, and am excited to serve and engage with my community in any way I can. I'm particularly interested in the Public Arts Committee because of my experience in the creative field. I was a creative podcast producer for three years, and have been publishing poetry for more than a decade. I'm accustomed to working in team environments and within budget guidelines. I'm also a skilled writer and journalist. My experiences with community art have shown me that developing public art projects together is a way of connecting the hearts of a community, and a connected community grows, prospers, and is healthier and happier.

Please don't hesitate to reach out if you'd like any other information, or would like to speak further. Thank you for your time and have a wonderful day.

Alexander Raeburn
alexanderraeburn@gmail.com
(504)432-4612

Jody Norway

From: Jeff Bergeron
Sent: Friday, June 4, 2021 7:17 AM
To: Jody Norway
Cc: Steven Mackenzie; Giuliano Cecchinelli
Subject: FW: Cemetery committee

FYI ☺

From: Heather Ritchie [mailto:bonnieweeheather@gmail.com]
Sent: Friday, June 4, 2021 6:50 AM
To: Jeff Bergeron <jbergeron@barrecity.org>
Subject: Cemetery committee

Good morning Jeff,

So nice to see you! I am very interested in participating in the cemetery committee meetings as a board member. As an active memorial artist and supporter of the arts in VT, I feel I could be a positive contributor to the committee and to the Barre community in this niche. Please let me know when you have the next meeting scheduled or when a good time to follow up would be. Thanks so much and have a great weekend!

Heather Milne Ritchie
802-249-1740
Heathermilneritchie.com

Jody Norway

From: Nancy Wolfe <nancywolfe@gmail.com>
Sent: Tuesday, April 13, 2021 10:05 AM
To: Jody Norway
Subject: Recreation committee

Hi Jody,

I have lived and been a homeowner in Barre city for 21 years. Before that we lived in Barre Town and taught at BTES. I like being around people of all ages, especially when I can be helpful. I have served on the Planning Commission and the Energy committee. I am past president and member of the Granite Center Garden Club and the Retired Teachers' Assn. and the Senior Center. We have 4 granddaughters living in our home keeping us young and the oldest helping with phone/computer problems. As long as I am mobile I hope to be involved and helpful

--Sincerely
Nancy Wolfe
4 Park St. Barre Vt. 05641

From: J Starr [mailto:jcstarr4@gmail.com]
Sent: Wednesday, May 19, 2021 12:56 PM
To: Steven Mackenzie <manager@barrecity.org>
Subject: Recreation Committee

Good Afternoon Mr. Mackenzie,

I am a new resident of Barre City. I have been looking for ways to get involved with my local community. I see that the Recreation Committee has noted in their minutes that they are seeking interested members to join the board. I was hoping you might provide additional information about this process?

Please feel free to contact me via telephone or email, whichever is most convenient for you. My cell phone number is (571) 282-7744.

Best regards,

Janelle Starr

From: Michael Hellein [<mailto:themichaek@gmail.com>]

Sent: Friday, May 28, 2021 11:05 AM

To: Jody Norway <ExecAssist@barrecity.org>

Subject: RE: DRB Appointment

"I am seeking appointment to the Development Review Board. I have lived in Barre as a homeowner for nine years, and work here (remotely) for a company based in Colorado. I currently serve on the Planning Commission (Secretary) and Transportation Advisory Committee (Vice Chair)."

Thanks,

Michael

June 2, 2021

Mr. Steve McKenzie P.E., City Manager
City of Barre
6 North Main Street, Suite 2
Barre, Vermont 05641

COPY

Dear Steve,

It has come to my attention there is a vacancy on the Barre City Development Review Board (DRB). Please accept this letter as my expression of interest in again possibly being appointed to the DRB.

When I resigned from the DRB several years ago, it was with the understanding my wife and I had several major projects on our property that needed to be addressed; namely

- Replacing the roof of the house with standing seam metal.
- Renovating the exterior of the house with vinyl siding.
- Redoing the landscaping of our property.
- Having a survey of our property completed.
- Replacing our 2 car garage.

The first four projects have been completed and the last of the projects is currently underway, i.e. the building of our garage. This project should be completed within the next few days. We have accomplished what we have set out to do.

As a result, I find myself with a renewed interest in again serving the City of Barre, as a member of the DRB. As I mentioned at the beginning of my letter, please accept this letter as my expression of being appointed to the DRB.

Sincerely,



Ulysse (Pete) Fournier, Jr.

Copy: Mrs. Janet Shatney, Director
Planning, Permitting, and Assessment



City of Barre, Vermont

"Granite Center of the World"

**ACTION ITEM BRIEFING MEMO
CITY COUNCIL AGENDA ITEM
CITY COUNCIL AGENDA: 06-22-21**

Discussion Item No. 9.E

AGENDA ITEM DESCRIPTION: Re-establishment of Organics Diversion Committee as Task Force

SUBJECT: Committees

SUBMITTING DEPARTMENT or PERSON: Mayor

STAFF RECOMMENDATION: N/A

STRATEGIC OUTCOME/PRIOR ACTION: Cost Savings/Environmental

EXPENDITURE REQUIRED: N/A

FUNDING SOURCE(S): N/A

LEGAL AUTHORITY/REQUIREMENTS: Charter

BACKGROUND/SUPPLEMENTAL INFORMATION:

Council took action to create a Joint-Organics Diversion Committee with Montpelier. In speaking with Mayor Watson, the proposed process is not a current priority for the City of Montpelier. Joint-Committee with Montpelier for Trash, Recycle and Compost has not been meeting and there has not been an effort to move forward with both municipalities.

LINK(S): <https://legislature.vermont.gov/statutes/section/24APPENDIX/001/00305>

ATTACHMENTS: WasteContract Montpelier Barre.docx and SW Feasibility Study.docx

INTERESTED/AFFECTED PARTIES:

City Council

City Administration

City Residents

Organics Diversion Committee Members

RECOMMENDED ACTION/MOTION:

Recommend having the City of Barre members of the committee serve on a temporary City task force instead. This group will review the attached documents with staff with the intent of gaining a cost estimate for contracted services within the City of Barre. Task force may then recommend to City Council action on budgeting estimated amount in the FY23 budget based on the information received, or that this action is not feasible.



City of Barre, Vermont

"Granite Center of the World"

**ACTION ITEM BRIEFING MEMO
CITY COUNCIL AGENDA ITEM
CITY COUNCIL AGENDA: 06-22-21**

Discussion Item No. 9.F

AGENDA ITEM DESCRIPTION: Discuss Recommendations to Provide to the Planning Commission

SUBJECT: Planning Commission

SUBMITTING DEPARTMENT or PERSON: Mayor

STAFF RECOMMENDATION: N/A

STRATEGIC OUTCOME/PRIOR ACTION: Planning

EXPENDITURE REQUIRED: N/A

FUNDING SOURCE(S): N/A

LEGAL AUTHORITY/REQUIREMENTS: State Law

BACKGROUND/SUPPLEMENTAL INFORMATION:

The Planning Commission has been looking to work on a white paper to the Council regarding the use of ARPA funds on housing. Chair David Sichel has asked for information, which I am expanding to gather information from Council based off the Municipal Plan and recent DRB decision based on the current Unified Development Ordinance.

LINK(S): <https://legislature.vermont.gov/statutes/section/24/117/04325>

ATTACHMENTS: Municipal Master Plan Implementation Table.pdf

INTERESTED/AFFECTED PARTIES:

City Council

City Administration

City Residents

Planning Commission

RECOMMENDED ACTION/MOTION:

Council to provide feedback to Mayor for consolidation and submission to the Planning Commission through their Chair. Include:

- suggested changes on the implementation table, including identifying organizations and individuals to lead the action steps
- 5-year Capital Plan creation and finalization
- Proposed white paper regarding use of ARPA funds

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REQUEST FOR PROPOSALS NO. _____
for
Feasibility study for residential solid waste collection
contracts in Montpelier and Barre, Vermont

1.0 INTRODUCTION

The Central Vermont Solid Waste Management District (the District, CVSWMD), the City of Montpelier (Montpelier), and Barre (Barre) hereby solicit proposals from qualified consultant services (Consultant) to conduct a feasibility study on implementing collection contract(s) for household trash and recyclables in Montpelier and Barre, Vermont. Proposals are sought from individuals, partnerships, or firms that have experience with the solid waste industry, financial analysis, solid waste collection routing, and municipal contacts for solid waste services.

Consultants must submit a proposal containing their qualifications, work program, and rates. The proposal must be organized according to the outline set forth in Section 5.0 Proposal Instructions of this RFP.

The consulting services will be funded through . The contract will be managed by the Project Management Team which will include a representative from each participating community and the Central Vermont Solid Waste Management District. The CVSWMD will provide coordination of the RFP process and financial management of the contract.

2.0 BACKGROUND AND GENERAL INFORMATION

2.1 PURPOSE OF FEASIBILITY STUDY

The current trash and recycling collection system in Central Vermont operates as a non-exclusive franchise for both residential and commercial waste. This means that haulers are licensed by the CVSWMD and compete for both residential and commercial customers through a private subscription system. Currently #? haulers provides residential solid waste collection in Montpelier and Barre.

SHOULD INFORMATION BE INCLUDED THAT IDENTIFIES THE ABILITY OF RESIDENTS TO SELF-HAUL TO A LOCAL DROP OFF? IF SO, SHOULD THE DROP OFF LOCATIONS BE IDENTIFIED, AND INFORMATION ON WHAT THEY COLLECT BE INCLUDED?

Recycling has been mandatory since ? and haulers are required to offer collection service. Separation of food scraps will become mandatory in 2020, which means that additional collection services will be needed; however, haulers will not be required to provide this service. THIS NEEDS MORE CLARIFICATION. A NEW SECTION COULD BE CREATED IN THIS DOCUMENT THAT PROVIDES FOR AN OPTION OR OPTIONS FOR HAULING OF ORGANICS. THE FEASIBILITY STUDY COULD ALLOW PROSPECTIVE BIDDERS TO BID ON ALL OPTIONS – WASTE, RECYCLING, ORGANICS; TO BID ON WASTE & RECYCLING BUT NOT ORGANICS; ONLY ORGANICS COLLECTION. FOR NOW, I’VE LEFT ORGANICS COMPLETELY OUT OF THIS DOCUMENT SO THAT WE CAN DISCUSS HOW TO APPROACH THIS.

The Cities of Montpelier and Barre want to evaluate consolidation of residential trash and recycling collections in their communities in order to explore whether it could:

- 1) Reduce costs to residents and haulers through more efficient collection routes.
- 2) Reduce environmental costs of excess truck traffic.
- 3) Reduce infrastructure impacts of excess truck traffic.
- ~~4) Increased recycling through direct and consistent education to residents.~~
- 5) Reduce litter and increase recycling through the use of wheeled carts by all residents
- ~~6) Increased diversion by using consolidated collection as the most cost-effective mechanism to add collection of food scraps.~~
- 7) Increase safety on local roads.
- 8) Reduce noise in neighborhoods.
- 9) Improve compliance with state and local mandates.
- 10) Or achieve other benefits to the participating communities in addition to those mentioned here.

The Cities of Montpelier and Barre want to procure a consultant to conduct a feasibility study on residential consolidated collection of trash and recycling to provide their Councils with the information needed to determine next steps.

2.2 CENTRAL VERMONT SOLID WASTE MANAGEMENT DISTRICT

Montpelier and Barre are two of the 19 member towns and cities that are members of the Central Vermont Solid Waste Management District. The CVSWMMD provides leadership, education, and services for residents and businesses in reducing and managing their solid waste in order to protect public health and the environment to

the greatest extent feasible. It is chartered as a municipality and governed by a Board of Supervisors, who are appointed by its member communities.

Ending Waste For Good. The CVSWMD is working to end waste for good through Zero Waste efforts designed to reduce and eliminate waste. It's n the journey to zero waste that efficiencies are created, business is generated, jobs are developed, and communities are bound together toward a common outcome.

2.3 MONTPELIER AND BARRE

The Cities of Montpelier and Barre are located in Central Vermont. Population and housing statistics are included in the table below.

CREATE & INSERT TABLE HERE

3.0 SCOPE OF SERVICES

Outlined below are brief descriptions of the focus areas that the successful Consultant is expected to analyze and report on over the contract term. Should additional areas of focus become evident over the course of the analysis, the Consultant should make these areas known to the Project Management Team, who at that time will determine whether or not the Consultant should proceed with analysis.

3.1 FOCUS AREAS

Definition of Household

Provide recommendation on which types of households should be included in a franchised collection system. Identify which multi-unit residential buildings (e.g., duplexes, apartments, residential units in mixed use buildings) or groups (e.g., condos, townhouses, or neighborhoods with a homeowners' association) if any, should be included in the collection program.

Collection Routing

Using the agreed upon definition of household: WHERE IS THERE AN AGREED UPON DEFINITION OF HOUSEHOLD?

1. Identify the current system(s) operating in Montpelier and Barre for the collection of residential recyclables. Recommend changes.
2. Recommend routes to be used in a consolidated residential collection system.

Financial Analysis

- 1.) Identify the minimum number of households required to achieve an anticipated cost beneficial opportunity for collection.

- 2.) Estimate the cost per household in a residential consolidated collection system for trash and recyclables for the cities of Montpelier and Barre respectively. Compare these projected costs to current rates. Project additional thresholds and indicate whether these levels of participation would result in reduced per household costs and estimate the percentage or actual cost benefits these might generate.

The following represent assumptions to be used in the analysis: will need to add information if organics are to be included

- Weekly trash and recycling collection is to be offered with 32-gallon, 64-gallon, and 96-gallon container options with unit-based rates.
- Assume curbside collection as the norm; backdoor service must be offered but may be offered at an additional fee.
- Hauler contracts are to include minimum performance standards
- Assume a contract term of 7 years.
- The bid for collection districts is to provide opportunities for small haulers.
- Hauler competition is maintained.
- Residents are direct billed for service by the hauler(s).
- Haulers provide and maintain collection carts for each material stream – trash and recycling.
- Residents may opt out and self-haul to a drop-off-center. (It is estimated that 15% of households will opt out.) WHAT IS THIS % BASED ON?
- Recommend a methodology to estimate how much the reduced truck traffic in a franchised collection system lessens the wear and tear on roads and reduces particulate and greenhouse gas emissions.

Small Hauler Participation

Participation by all current haulers cannot be guaranteed. An open bidding process must occur or the process would violate the Commerce Clause of the U.S. Constitution. However, if a public benefit is established, the CVSWMD or a municipality could employ certain restrictions or mechanism in a bidding process:

- a) The number of collection districts or percentage of customers that one hauler can win in a bidding process can be restricted through the establishment of goals and guidelines.
- b) Bidding on certain collection districts can be restricted to small haulers (e.g., those serving less than a certain number of customers) through the establishment of goals and guidelines.

- c) Bidders can be encouraged to utilize other haulers, and small haulers can be encouraged to bid cooperatively.
- d) The type of disposal permitted for the trash portion collected can be limited (e.g., to landfill only, no incineration.)
- e) Knowledge of local area or familiarity with collection routes in Washington County can be included as one of the selection criteria.

If there is a decision to allow organics to be collected as a sole collection by a hauling option, then the **above list** may be the section in which to describe that as an option, and then create a separate ORGANICS COLLECTION section later with conditions and options.

Public Input **NEW CONTENT**

Assist Montpelier and Barre with obtaining public input on a residential franchised collection system for trash and recyclables. Describe opportunities for the two communities to explain the proposed system to residents, provide for public engagement, and

- Outline/describe opportunities for messaging the proposed collection program in both communities. This should include traditional methods and use of electronic and public media to identify and explain the opportunity and its potential benefits.
- Establish a webpage, website or other online opportunity for the collection of citizen comments during an established public comment period.
- Coordinate and facilitate one public meeting in each community to receive public input. Provide a written synopsis of the meetings, to which sign-in sheet(s) are attached.

Implementation Steps & Timeline

Recommend all steps and timeline for implementation of a franchised collection system in Montpelier and Barre.

4.0 PROCUREMENT SCHEDULE

Need to insert dates for each of the items below.

RFP Issuance:

Pre-Proposal Meeting:

Deadline for Receipt of Additional Questions:

Proposals Due:

Attendance, either in person or via phone, at the Pre-Proposal Meeting is not mandatory, but is highly recommended. The meeting will be held in Council Chambers, City Hall, Montpelier, Vermont. address and call in number

A Proposal Evaluation Committee comprised of representatives from the cities of Montpelier and Barre will evaluate the proposals and recommend Consultants for selection within approximately three (3) weeks following receipt of Proposals. The successful Consultants will be expected to begin the contract on or about DATE. Proposal packages must be sealed and marked clearly with the Consultant's name and the following: Proposal _____ Enclosed: Feasibility Study for Residential Solid Waste Collection Contracts in Burlington and South Burlington, Vermont". Proposals should be addressed to:

5.0 PROPOSAL INSTRUCTIONS

This is a request for proposals, not a request for bids. There will be no public opening or reading of responses received. The Consultant shall bear all costs related to responding to this RFP. Failure to adhere to all submittal requirements may result in disqualification.

Proposals must include the following sections in the following order:

- I. Cover Letter
- II. Introduction
- III. Project Understanding
- IV. Statement of Qualifications
- V. Project Management and Coordination Plan
- VI. Method of Billing
- VII. Appendices

Each Section of the Proposal should be marked clearly and tabbed for easy reference. The Committee considers straightforward and simple presentations to be most effective. Elaborate and extraneous materials are strongly discouraged.

In keeping with the District's policies promoting source reduction and recycling, we suggest that all pages be duplex-printed on recycled paper.

Five (5) copies of the written proposal must be delivered to the CVSWMD Administrative Office no later than _____ on day of the week _____ month, day, 2019. Proposal packages must be sealed and marked clearly with the Consultant's name and with the phrase "Proposal No. _____ Enclosed: Feasibility Study for Residential Solid Waste Collection Contracts in Montpelier and Barre, Vermont. Proposals should be addressed to:

WHO AND WHAT IS THE ADDRESS FOR THIS?

5.1 The cover letter must contain:

- Identification of the Consultant;
- Identification of Consultant's key staff members proposed to be involved in the project;
- An acknowledgement of receipt of this RFP, all RFP addenda (if any), and a statement that it is understood that all conditions contained in this RFP can be incorporated in to any resulting contract;
- A statement that the Proposal will remain in effect for **one hundred twenty (120)** days after receipt by the District;
- A statement affirming that all information contained in Consultant's proposal is factual and is accurate (deliberately misrepresenting facts will be grounds for dismissal from consideration on this RFP):
- The name and telephone number of an individual or individuals with authority to commit to all provisions of this RFP during the period in which the Proposal Evaluation Committee is evaluating the proposals; and
- The signature of an individual who is authorized to bind the Consultant contractually.

5.2 Introduction

This section of the proposal is to contain a brief summary of the history of the firm. Accomplishments and successes that demonstrate knowledge of the solid waste industry should be clearly identified. **Work performed for other solid waste entities on a regional or national level will be viewed favorably during the review process.** Also include in this section, if applicable, a detailed description of:

- Any current or former projects that the Consultant worked on related to the Central Vermont Solid Waste Management District, the City of Montpelier, or the City of Barre;
- Any former or current projects that may be a conflict of interest with the operations or projects of the CVSWMD, the City of Montpelier, or the City of Barre;
- Any projects the Consultant failed to complete or was terminated from the past three years including a description of each project and the reasons for such failure and/or termination.
- Any lawsuits in which the Consultant is or was involved in during the last three years that could materially affect the performance of the firm undertaking this project.

5.3 Project Understanding

This section of the proposal is to provide a succinct statement of the Consultant's understanding of the project needs of Montpelier and Barre.

5.4 Statement of Qualifications

The statement of qualifications shall include a clear delineation of Consultant's qualifications in performing the services identified in or anticipated from the description of activities identified in Section 3.0 Scope of Services. At a minimum, consultants must provide the following:

5.4.1 Project Team Overview

The Consultant shall identify the proposed project team and provide an overview of the members of the Project Team identifying their role, their qualifications, as well as their individual and collective experiences. Because the proposal's evaluation will be based strictly on the project staff, identification/inclusion of regional managers, office managers, marketing staff, etc., is specifically not requested.

5.4.2 Project Team and Subcontractors

The Consultant shall identify the proposed project team and the roles of each of the team members. Team members are defined as other firms that will be subcontracted by the Consultant to provide additional support and/or expertise to the project. It is expected that the team identified in the proposal will be consistent throughout the term of the project and will be utilized should the Consultant be awarded a contract. Should the Consultant not identify any team members at this time, but he Consultant chooses a team member after the award, said subcontract will need the Project Management Team's approval, in writing, prior to their use.

5.4.3 Organizational Chart

An organizational chart is to be prepared to show the chain of responsibility and control for the project. Titles of individuals are to match those in Section ____ Method of Billing.

5.4.4. Project Staffing

Consultants must demonstrate the experience and qualifications fo personnel assigned and committed to the project. Consultants are to provide the following:

- Project staff's applicable experience, each member's applicable experience in: financial analysis, solid waste collection routing, municipal contracts for solid waste services, and any other experience relevant to the project.

5.4.5. Subconsultants

- For each sub-consultant, provide a concise description of the role to be served and describe their experience in performing similar roles on other projects.

5.4.6 Resumes

Resumes for each of the personnel assigned to this project are to be provided. In addition, provide institutional resumes of all sub-consultants, and the resumes of the personnel they will assign to the project. The titles shown on the resumes are to correspond with the titles used in the organizational chart (see _____ section) and also, in Section 5.6 Method of Billing. The resumes for individuals are to be one page or less.

5.4.7 Project Descriptions

Respondents to this RFP are to have demonstrable knowledge and experience in financial analysis, solid waste collection routing, and municipal contracts for solid waste services. Consultants are to provide a description of a minimum of three (3) and maximum of five (5) projects which demonstrate the firm's ability to perform the requirements identified in Scope of Service set forth in Section _____ of this RFP. Each project descriptions is limited to two pages in length and is to contain the following:

- Project name;
- Contracting agency name, address, and telephone number of the principal agent responsible for overseeing the contract;
- Date of project commencement and completion (if applicable);
- A list of project team members and a brief description of each member's responsibilities. This includes the use and role of any sub-consultant.
- Scope of services. Describe only that portion of the project's scope for which the Consultant was directly responsible. Do not outline aspects of the project for which the Consultant was not responsible.
- Timeliness in meeting project deadlines.
- Any other information that the Consultant feels would reflect the ability to serve as Consultant for the Feasibility Study for Residential Solid Waste Collection Contracts in Montpelier and Barre, Vermont.

5.4.8 Project Management and Coordination Plan

The Consultant shall detail how the Consultant proposes to manage the work and interface with Montpelier and Barre Project Management Team. The Consultant shall propose an efficient method and timeline to include critical milestones to keep the Team aware of all key issues, decisions, and changes in the project scope. The Project Management Plan is to consist of the Consultant's proposal for managing and controlling the work to be performed under this contract accomplishing the Scope of Services described in Section 3.0 of this RFP. The Project Management and Coordination Plan must describe the Consultant's approach to completing these projects, how Consultant intends to meet the demands of the projects and a schedule

for completion of the projects. The services to be completed directly by the Consultant must be clearly identified as do those services that will be subcontracted.

5.4.9 Multiple or Remote Offices Cost Control

Should the Consultant or portions of the Project Team be located outside of Vermont, or should the Project Team propose to utilize personnel from more than one office location, describe how coordination, travel, document transfer, etc., will be managed and detail costs that will be incurred as a result of the Project Team configuration proposed.

5.5.0 Evening Meetings

The selected Consultant will be required to present the final report on the study to the Montpelier City Council and the Barre City Council in separate meetings. Should the Consultant propose to utilize personnel from out-of-state offices, please describe how coordination, travel, etc. shall be managed and note what additional costs will be incurred as a result of the participation in these meetings or any other public meetings.

5.5.1 Method of Billing

Projects shall be billed as agreed to by the successful Consultant and the District. The District's preferred payment schedule is 40-30-30: Forty percent of the project cost payable upon project commencement, thirty percent payable at the agreed upon mid-point, and thirty percent payable once the project is concluded to the satisfaction of the Project Management Team. The District's standard payable cycle is net 30 of receipt of the itemized invoice. In order to simplify billing procedures, the Consultant shall propose fixed standard rates by category; such fixed rates shall include direct and indirect costs. To facilitate the review process, the Consultant shall provide a single table, organized by proposed billing categories, showing individual(s) for which a resume has been provided, project title as shown on the organizational chart, firm name, job title at the firm, fully burdened billing rate (based on overhead rate and proposed profit margin) for each category. MAY NEED TO REVISE THE ABOVE DUE TO DIFFERENT PREFERENCES BY CVSWMD, MONTPELIER AND BARRE

All direct expenses (excluding administrative overhead and incidentals referenced above) shall be billed at cost. There shall be no markup applied for the use of sub-consultants or any materials or equipment utilized to perform this work. The Consultant shall also provide a list of all direct expense costs and equipment rentals rates, including the cost for any disposal equipment/supplies. This includes, but is not limited to: reimbursement for sub-consultants, health and safety supplies, mileage, lodging, meals, etc. The Consultant shall list out what types of incidentals, for those not specifically listed, they typically request reimbursement on project invoices.

5.5.2 Proposed Cost Estimate

Consultants must provide prices as requested for each Task, its personnel and each of its subcontractors, including any incidentals. The estimate should be as detailed as possible showing hourly billing rates for key personnel, hours estimated, and all other

incidentals. The Project Budget must be comprehensive, including all Tasks, by name; all personnel assigned to each Task; the number of hours for each Task and for each person assigned to that Task.

5.5.3 Appendices

Consultants may include any information not solicited that the Consultant believes to be relevant and important to the understanding of the Proposal. Unnecessary attachments are strongly discouraged.

6.0 Proprietary Information

All Proposals become the property of the District and will be subject to public review. If any proprietary information is contained in or attached to the written Proposal, it must be clearly identified for the District to ensure protection of such information. Such information must also meet generally accepted definitions of trade secrets or other confidential business information.

7.0 RFP Questions

Any questions concerning the Scope of Services must be received in written form and will be accepted until **2:00 P.M. on day, Month, date, year**. All written questions should be addressed to:

WHO SHOULD BE THE CONTACT?

ADDRESS

Written questions may be transmitted by mail or by e-mail (email of above contact); however, the District will not be responsible for information that is not received, and it is the Consultant's responsibility to confirm our receipt of the questions. ***Please note that questions will not be answered over the telephone.***

Written responses to all substantive questions will be forwarded to all prospective Consultants in advance of the submittal deadline.

8.0 EVALUATION AND SELECTION PROCESS

8.1 Evaluation Criteria

The Proposal Evaluation Committee will consider the following factors in developing a shortlist of firms:

8.1.1 Experience of Firm

- Evidence of past work in solid waste municipal contracts; routing of solid waste collection; and financial analysis of collection systems;

- Expertise and specific experience of assigned personnel in the types of work referenced above;
- Qualifications and favorable references for project team, and sub-consultants, if any.

8.1.2 Experience of Key Staff

- Evidence of past work in solid waste municipal contracts; routing of solid waste collection; and financial analysis of collection systems;
- Expertise and specific experience of assigned personnel in the types or work referenced above;
- Qualifications and favorable references for project team, and sub-consultants, if any.

8.1.3 Quality of Response

- Appropriateness of project management approach to be employed;
- Demonstration of understanding of the project and its goals and responsiveness thereto;
- Completeness of response; adherence to instructions;
- Detail and quality of Project Management and Coordination Plan and demonstration of ability to meet work schedules.

8.1.4 Fee Proposal

8.2 INTERVIEWS

On the basis of the evaluation, the Proposal Evaluation Committee may choose to shortlist three to five firms for interviews. Shortlisted firms will be invited to provide brief presentations of their Proposal at the District's offices at 137 Barre Street, Montpelier, VT 05602. The Committee reserves the right to make a recommendation for contract award on the basis of the interview or to forego the interview process and the make the recommendation directly from the evaluation of the written Proposals. The Committee's recommendation must be approved by both the Montpelier City Council and the Barre City Council and each city's Attorneys.

8.3. Negotiation of Contract

Following selection of the preferred Consultant, the Project Management Team will seek to negotiate a contract for performance of this work with the Consultant.

The Consultant's Project Management and Coordination Plan should be developed in sufficient detail so that it is capable of serving as an attachment in any resulting contract.

If the Project Management Team is unable to negotiate a satisfactory contract with the preferred Consultant within a reasonable timeframe, the Project Management Team

reserves the right to negotiate with any or all of the other Consultants to this RFP without further advertisement or issuance of additional Requests for Proposals.

The contract , which ultimately may result from this RFP, will be governed by the laws of the State of Vermont.

9.0 TERMS AND AGREEMENTS

9.1 Proposal Evaluation Committee & Project Management Team Rights

The RFP does not commit the Project Management Team to contract with any Consultant nor does it commit the Project Management Team to an exclusive agreement with the Consultant for these services. The Proposal Evaluation Committee and Project Management Team reserve the following rights:

- To withdraw this RFP at any time;
- To reject any and all Proposals or Consultants;
- To eliminate any of the tasks in the Scope of Services of this RFP and to issue a contract with a correspondingly reduced Project Work Program;
- To modify the RFP or to issue subsequent RFPs at the Proposal Evaluation Committee's sole discretion;
- To Postpone award of the contract;
- To accept the Proposal that the Project Management Team finds to be the most advantageous and/or beneficial of the Project Management Team;
- To split the award or to make multiple awards;
- To negotiate the Proposal to further refine, clarify, amend, or expand any and all aspects of the Proposal;
- To accept Proposals that do not offer the lowest cost;
- To confirm all references and contact further references obtained from other sources as deemed necessary;
- To request Consultants to send representative to Montpelier, Vermont for interviews at their own cost;
- To waive any informalities or technicalities in any Proposal; and,
- To apply any additional rights as may be allowed under applicable purchasing laws and rules.

9.2 Term of Contract

The contract, which may result from this RFP will be a service contract. The term of the contract will be for a period of one year from (on or about) Month, Day, Year to Month,

Day, Year, however it is expected that the project will not need this amount of time to complete. The Project Management Team anticipates the project should take no longer than 3-6 months from start to end.

9.3 Equal Opportunity Compliance

The Consultant must agree to abide by all applicable Vermont State Minority Hiring laws, Equal Opportunity Employment Rules And Regulations, and Executive Orders and any and all other applicable Vermont employment laws, rules or regulations.

State Equal Opportunity Compliance Certificate and Agreement procedures must be complied with when applicable. If applicable, certification shall be required as a condition precedent to receipt of any payment for supplies or services.

9.4 Minority Business Enterprise

When practicable, the Consultant will be required to seek minority and women business enterprise participation in the amounts required by Vermont general laws and applicable regulations.

9.5 Handicapped

The Consultant will not discriminate against any employee or application for employment because of physical or mental handicap for any position for which the employee or applicant is qualified, and in the even of noncompliance, the Project Management Team may declare the Consultant in breach and take any necessary legal recourse, including termination or cancellation of the contract.

9.6 Subcontractors

It will be the Consultant's responsibility to see that all subcontractors, if any, conform to all contract requirements and provisions stated in the RFP.

9.7 Relationship as Independent Contractor

The relationship between the Consultant and the Project Management Team under any resulting contract shall be that of an independent contractor. Nothing in this RFP nor any resulting contract shall be construed to designate the Consultant, or any of its employees or subcontractors, as employees, agents, joint ventures, or partners of the CVSWMD, or the Cities of Montpelier and Barre.

9.8 Conflict of Interest

A Consultant submitting a Proposal thereby certifies that: No officer, agent, employee of the District, Montpelier, or Barre has a pecuniary interest in the Proposal or has participated in contract negotiations on the part of the Consultant; that the Proposal is made in good faith without fraud, collusion, or connection of any kind with any other Consultant for the same call for Proposals; and, the Consultant is competing solely in its own behalf without connection with, or in obligation to, any undisclosed person or firm.

Further, no person or firm who is listed as a Subcontractor shall be eligible to become a qualified Consultant in the same solicitation.

9.9 Contractual Disputes

All claims, disputes, and other matters in question arising out of or relating to this Contract or the performance or interpretation thereof shall be submitted to arbitration pursuant to the terms of **Title 12, Chapter 192, of the Vermont General Laws, as amended.**

9.10 Termination

- If the Consultant or the Project Management Team fails to fulfill its obligations in a timely and proper manner, or if either party violates any of the agreements of the negotiated contract, either party shall have the right to terminate the contract by giving written notice to the other party. Termination of the contract shall in no way limit any legal rights of either party.
- The Project Management Team reserves the right to terminate the contract without cause at any time by giving the Consultant ten (10) days' written notice. The Consultant shall be entitled to reasonable compensation for any services Management Team may have suffered due to breach of contract. Any finished or unfinished work prepared on behalf of the Project Management Team shall become the property of the Project Management Team.
- Any resulting contract may be considered null and void if the Consultant deliberately misrepresented facts or provided false information in the Proposal.

9.11 Billing Procedures

Final billing procedures shall be negotiated prior to the execution of the Contract. Invoices minimally will contain the Consultant's name, address and phone number; date; and a work order summary including amount approved, amount billed, amount remaining to date. Invoices shall be paid by the District within thirty (30) days of receipt of an acceptable invoice for goods and/or services that have been received and accepted.

9.12 Insurance

The Consultant, prior to contract execution, will be required to submit a valid, currently dated Certificate of Insurance satisfactory to the District as evidence that the Consultant is adequately insured throughout the period of the contract by a recognized and responsible insurer authorized to do business in Vermont. Minimum limits include:

- **Comprehensive General Liability, \$2,000,000 Combined Single Limit;**
- **Business Automobile, \$500,000 Combined Single Limit;**
- **Errors and Omissions, \$1,000,000; and**
- **Workers' Compensation Coverage as required by Vermont State Law.**

The Certificate of Insurance should name the Central Vermont Solid Waste District, City of Montpelier and the City of Barre as additional named insured. Any exclusions or

exceptions to the types of claims and any amount that may be collected against a legitimate claim must be clearly delineated. The insurer will be required to provide the Project Management Team with notification of any cancellation or change in the insurance coverage during the period of the contract between the Consultant and the Project Management Team. Such notification must be made not less than thirty (30) days prior to date said cancellation or change becomes effective.

MAY NEED TO REVISE THE ABOVE INFORMATION TO SUIT THE CVSWMD, MONTPELIER AND BARRE

Failure to maintain insurance required shall be cause for immediate termination of the contract by the Project Management Team.

The Project Management Team reserves the right to consider and accept alternate forms and plans of insurance or to require additional or more extensive coverage for any individual requirement. The requirement for Workers' Compensation coverage shall not be waived. However, the required limits of property and casualty coverage may be modified if the Consultant can demonstrate an acceptable alternative method of preventing transferal of insurable risk to the Central Vermont Solid Waste Management District, the City of Montpelier, and/or the City of Barre or of eliminating such risk.

9.13 Liability of Waiver

The Consultant must agree to waive any and all claims against the Central Vermont Solid Waste Management District, the City of Montpelier, and the City of Barre for any loss or injury incurred while on any property of the Central Vermont Solid Waste Management District, the City of Montpelier, and the City of Barre during the period of the Contract.

CONTRACT FOR SERVICES

This Contract is entered into on **MONTH DAY YEAR** by and between Central Vermont Solid Waste Management District (hereinafter "CVSWMD"), the City of Montpelier ("Montpelier"), the City of Barre ("Barre") and **Consultant,** with a principal place of business in **CITY/STATE** with a mailing address of **_____**, (hereinafter "Contractor") for services to CVSWMD, Montpelier, and Barre. CVSWMD, Montpelier, and Barre are referred to collectively as "the Municipalities." CVSWMD, Montpelier, Barre and Contractor are referred to collectively as "the Parties."

In consideration of the mutual covenants and agreements as hereinafter set forth, the Parties hereto agree as follows:

ARTICLE 1: SERVICES PROVIDED

Contractor agrees to perform the services as described within the *Scope of Services for a Feasibility Study for Residential Solid Waste Contracts in Montpelier and Barre*, dated **MONTH DAY YEAR**, submitted by the Contractor (Exhibit A).

Contractor shall perform all services required under this Agreement in a good workmanlike manner consistent with industry standards and according to the specifications and performance standards established by the Municipalities, if any. The Municipalities have the right to inspect, and may reject, any services provided by Contractor under this Agreement that, in the determination of the Municipalities, were not completed in a good workmanlike manner or that otherwise failed to satisfy the established specifications or performance standards.

ARTICLE 2: COMPENSATION AND BILLING

The dollar amounts highlighted in the following paragraph are from Chittenden's Contract documents and have been left as an informative reference and should be replaced with relevant Montpelier, Barre and CVSWMD dollar amounts.

Compensation for the above services will be **not greater than \$115,823**. CVSWMD's share of the compensation shall not exceed **\$14,243** to cover costs associated with **_____**. Montpelier's share of the compensation **shall not exceed \$60,000**. Barre's share of the compensation **shall not exceed \$41580**. The Municipalities shall not be liable for any amount that exceeds their individual listed maximum limiting amounts. If any one of the Municipalities fails to pay its share of compensation as set forth herein, liability for the unpaid amount shall rest solely with the non-paying entity. The remaining Municipalities shall have no responsibility or liability for any unpaid amounts incurred by any non-paying Municipality.

Invoices and Billing: Contractor shall submit monthly invoices to CVSWMD for the services provided under this Contract on a time and materials basis. The schedule with rates for the personnel who will be paid under this Contract may be found in **Exhibit B**. CVSWMD shall pay Contractor within thirty (30) days from invoice date (excluding any disputed items). CVSWMD shall provide Contractor with a written description of disputed items. CVSWMD and Contractor shall promptly resolve any disputed items.

CVSWMD shall submit monthly invoices to Montpelier and Barre for reimbursement of payments made by CVSWMD to the Contractor on their behalf for services provided under this Contract, excluding the costs of CVSWMD's contribution. **Montpelier will be billed at a rate of fifty-nine percent (59%) and South Montpelier will be billed at a rate of forty-one percent (41%) of the payments made to the Contractor on their behalf.** **This sentence needs to reflect the actual percentages that reflect the contributions noted earlier in the document.** Montpelier and Barre shall pay CVSWMD within thirty (30) days from invoice date (excluding any disputed items). Montpelier and Barre shall provide CVSWMD with a written description of disputed items. CVSWMD, Montpelier, and Barre shall promptly resolve any disputed items.

ARTICLE 3: TERM

The term of this contract shall be from **MONTH DAY YEAR** to **MONTH DAY YEAR**. The term of the contract may be extended only by mutual written agreement of the Parties.

ARTICLE 4: INDEPENDENT CONTRACTOR

Contractor further acknowledges and agrees that it is an independent contractor and that nothing herein shall be construed to create the relationship of employer and employee between the Municipalities and Contractor. No employee-related withholdings or deductions shall be made from payments due Contractor. Contractor shall not be entitled to receive any benefits from the Municipalities and shall not be eligible for workers' compensation or unemployment benefits.

ARTICLE 5: ASSIGNMENT AND SUBCONTRACTING

This Contract is binding upon and inures to the benefit of the heirs, successors, and assigns of the Parties hereto. None of the Parties hereto may assign its rights or obligations under the Contract without the prior written consent of the other Parties. This Contract shall be governed by the laws of the State of Vermont.

Except for **NAME OF SUBCONTRACTOR** and **NAME OF SUBCONTRACTOR (if more than one)**, Contractor shall not enter into any subcontract for performance of any services contemplated under this Contract nor assign any interest in the Contract without the prior written approval of the Parties and subject to such conditions and provisions as the Parties may deem necessary or desirable in their sole discretion.

If the Municipalities permit the use of subcontractors, no subcontractor, including **NAME OF SUBCONTRACTOR** and **NAME OF SUBCONTRACTOR (if more than one)**, may perform any work under this Contract without first providing CVSWMD certificates of insurance showing all of the coverages required in Article 10 of this Contract. Contractor shall be responsible for the performance of all subcontractors. Before paying a claim that involves the use of materials or labor supplied by someone other than the Contractor, CVSWMD may require Contractor to supply proof of payment for such materials or labor. Contractor shall pay the subcontractor(s) for undisputed services provided by them within 30 days of receiving payment from CVSWMD.

ARTICLE 6: CONFIDENTIALITY AGREEMENT

Contractor acknowledges that the Municipalities, in the conduct of their operations, may obtain information from third parties or may develop their own internal information that is confidential and exempt from public disclosure pursuant to **1 V.S.A. Section 317(c)**. If any such information is identified by the Municipalities as being confidential or otherwise exempt from public disclosure, Contractor agrees to (i) keep and maintain such confidential information and protect and safeguard such confidential information against unauthorized use, publication, or disclosure; (ii) not use any of the confidential information except for purposes of performing the services set forth in this Agreement; (iii) not to, directly or indirectly, reveal, report, publish, disclose, transfer, or otherwise use any of the confidential information except as specifically authorized by the Municipalities. Such obligation of confidentiality shall not apply to (i) confidential information which is, or later becomes, public knowledge other than by breach of the provisions of this Agreement, (ii) information in the possession of Contractor with the full right to disclose prior to its receipt from the Municipalities, as evidenced by written records, or (iii) information to which a court of competent jurisdiction requires Contractor to disclose.

ARTICLE 7: EQUIPMENT AND MATERIALS

Contractor warrants that it has the necessary equipment to provide the services required by this Agreement. All materials used or supplied under this Agreement shall be of first quality and meet the specifications established by the Municipalities, if any. Contractor will be solely responsible for supplying, storing, maintaining, and replacing any and all equipment that is necessary for implementing the services under this contract.

The Municipalities are exempt from sales tax on purchases for materials and products that are permanently incorporated into the infrastructure. Contractor shall pay all legal costs and assessed penalties for improper use of the Municipalities' exemption certificate numbers.

ARTICLE 8: PERSONNEL

Contractor is responsible for compliance with all applicable State and Federal laws. Contractor will manage his/her own personnel without general oversight by the Municipalities and shall oversee and coordinate sub-contractors that are approved by the Municipalities.

Contractor alone shall be responsible for ensuring compliance with all applicable regulatory requirements including but not limited to those from FMCSA and Vermont Occupational Safety and Health Administration (VOSHA).

Contractor further agrees to include this provision in all subcontracts.

ARTICLE 9: INDEMNIFICATION

Contractor shall indemnify and hold harmless the Municipalities and the Municipalities' agents and employees, from and against all losses and all claims, demands, payments, suits, actions, recoveries, claims of outstanding indebtedness, attorneys fees, liens, and judgments of every nature, and description brought or recovered against them by reasons of any negligent act or omission of the said Contractor, its agents, employees, or sub-contractors, in the execution of the work or in guarding the same. The Contractor shall defend the Municipalities and their officers and employees against claims or suits based solely on acts of negligence or omission on the part of the Contractor or of any agent or subcontractor of the Contractor. The Municipalities shall notify the Contractor in the event of any such claim or suit, and the Contractor shall immediately retain counsel and otherwise provide a complete defense against the claim or suit.

Contractor shall assume full responsibility for the protection of all buildings, structures and utilities (both public and private). All damage, injury or loss to any public or private property, by the Contractor, or any sub-contractor, shall be replaced or restored to at least the original condition to the satisfaction of the Municipalities at the Contractor's expense.

Nothing in this Contract shall constitute a waiver by the Municipalities of any statutory limits or immunities from liability.

ARTICLE 10: INSURANCE

Before commencing work on this Contract, the Contractor must provide certificates of insurance to show that the following minimum coverages are in effect. Contractor agrees that it will provide and maintain at all times during the term of this Contract such insurance coverages as are indicated herein and that will otherwise comply with the provisions that follow. No warranty is made that the coverages and limits listed herein are adequate to cover and protect the interests of the Contractor for the Contractor's operations. These are solely minimums that have been established to protect the interests of the Municipalities. If higher limits or other forms of insurance (e.g., professional liability, builders risk, hazardous materials or pollution liability) are required by the Municipalities; the Contractor will comply with such requirements. Such policy or policies shall apply to the extent of, but not as a limitation upon or in satisfaction of, the indemnity provisions of this agreement. The provisions of this section shall also apply to all subcontractors, other lower tier contractors, independent contractors and sole proprietors engaged by Contractor with respect to this Contract, and Contractor shall be entirely responsible for securing the compliance of all such persons or parties with these provisions.

All policies required by this Contract shall be issued by an insurer with a rating of A or better from a financial rating organization such as S&P or AM Best and shall include waivers of any right to subrogation. Contractor shall not commence or perform any work under this Contract until certificates of insurance are presented to CVSWMD showing the required coverages are in full force and effect with at least the required coverage limit amounts and naming the Municipalities as additional insured.

Contractor agrees to maintain at all times during the period of this Agreement all of the following:

General Liability. Commercial General Liability insurance coverage providing coverage on an "occurrence" rather than on a "claims made" basis, which policy shall include, but not be limited to, coverage for bodily injury, property damage, personal injury, contractual liability (applying to this Agreement), independent contractors, and products completed operations liability (if applicable). Contractor agrees to maintain at all times during the period of this Agreement a total combined general liability policy limit of at least \$1,000,000 per occurrence and \$2,000,000 aggregate, applying to liability for bodily injury, personal injury and property damage, which total limit may be satisfied by the limit afforded under its commercial general liability policy, or equivalent policy, or by such policy in combination with the limits afforded by an umbrella or excess liability policy(ies); provided that the coverage afforded under any such policy in combination with the limits afforded by an umbrella or excess liability policy is at least as broad as that afforded by the underlying commercial general liability policy. The policies shall name the Municipalities as additional insured.

Automobile liability. Business automobile liability insurance covering liability for bodily injury and property damage arising out of CVSWMD's ownership, use, maintenance, or operation of all owned, non-owned, and hired automobiles and other motor vehicles utilized by Contractor in connection with its performance under this Contract. Such policy shall provide total liability limits for combined bodily injury and/or property damage in the amount of at least \$1,000,000 per accident, which total limits may be satisfied by the limits afforded under such policy, or by such policy in combination with the limits afforded by an umbrella or excess liability policy(ies); provided that the coverage afforded under any such umbrella or excess liability policy(ies) shall be at least as broad with respect to such business automobile liability insurance at that afforded by the underlying policy. Unless included within the scope of Contractor's commercial general liability policy, such business automobile liability policy shall also include coverage for motor vehicle liability assumed under contract. The policies shall name the Municipalities as additional insured.

Workers' Compensation. Workers' compensation insurance in compliance with all applicable statutes including an all states or universal endorsement where applicable. Such policy shall include employer's liability coverage in an amount of no less than \$500,000. If Contractor is not required by statute to carry workers' compensation insurance, Contractor agrees: (1) to provide CVSWMD with evidence documenting Form

29 has been filed with the Vermont Department of Labor, which excludes Corporate officers or LLC members from the requirement of obtaining workers' compensation insurance;(2) to provide prior notice to CVSWMD of any change in exemption status {3) to defend, hold harmless, and indemnify the Municipalities as additional insured from and against any and all claims and losses brought by Contractor or any subcontractor or other person claiming through Contractor for workers' compensation or employers' liability benefits for damages arising out of any injury or illness resulting from performance of work under this agreement. If any such change requires Contractor to obtain workers' compensation insurance, Contractor agrees to promptly provide CVSWMD with evidence of such insurance coverage.

ARTICLE 11: NON-APPROPRIATION

The Parties understand and agree that the obligations of the Municipalities to make payments under this Contract during several fiscal years shall constitute a current expense of each Municipality and shall not in any way be construed to be a debt of the Municipalities in contravention of any applicable constitutional, statutory limitation, requirement, or their respective charters. Nothing in this Contract shall constitute a pledge of the credit or tax revenues, funds, or monies of the Municipalities. The decision whether or not to budget and appropriate funds during each fiscal year of the Municipalities is within the discretion of their governing body. The obligations of the Municipalities under this Contract are subject to annual appropriations by the Municipalities governing body. In the event no funds or insufficient funds are appropriated and budgeted for payments due under this Contract, the Municipalities may terminate this Contract. The terminating Municipality shall deliver written notice to the Contractor thirty {30} days in advance of termination of this Contract and any obligation of the Municipality under this Contract shall immediately terminate.

ARTICLE 12: TERMINATION

The Municipalities may terminate this Agreement, with or without cause, upon 30 days written notice.

ARTICLE 13: DEFAULT

The occurrence of any of the following shall constitute default by Contractor and, if not corrected within ten {10} days of CVSWMD providing Contractor written notice of the default, shall allow the Municipalities to immediately terminate this contract:

- (1) failure to adequately perform or deliver the required services;
- {2) if applicable, failure to provide the required bonds or other security acceptable to CVSWMD before starting any work;
- {3) declaration of bankruptcy by Contractor;
- (4) making a material misrepresentation to the Municipalities;

- (5) persistently disregarding laws, ordinances, rules, regulations, or orders of any public authority having jurisdiction; or
- (6) failure to perform any other material provision of this Contract.

Upon default of this contract by Contractor, CVSWMD may withhold any payment due Contractor for purposes of set-off until such time as the exact amount of damages due is determined. Such withholding shall not constitute default or failure to perform on the part of the Municipalities.

None of the Parties shall be held responsible for delay or failure to perform when such delay or failure is due to any of the following uncontrollable circumstances unless the act or occurrence could have been foreseen and reasonable action could have been taken to prevent the delay or failure: fire, flood, epidemic, strikes, wars, acts of God, acts of public authorities, or delays or defaults caused by public carriers; provided the non-performing party gives notice as soon as possible to the other parties of the inability to perform. The Municipalities and the Contractor agree to attempt to resolve quickly all matters related to uncontrollable circumstances and use all reasonable effort to mitigate its effects.

In addition to the above, in the event of a State or Federal Disaster Declaration, the Municipalities reserve the right to suspend certain provisions of this contract to conform with FEMA or Vermont Emergency Management regulations and directives.

ARTICLE 14: REMEDIES

Default or breach of this contract by Contractor shall entitle the Municipalities to seek remedies under law and as provided by this Contract. In the event this Contract is terminated by reason of default by Contractor, the Municipalities may recover the necessary costs of termination, including but not limited to, administrative, attorneys fees, and legal costs, from Contractor. Except when caused by uncontrollable circumstances, if Contractor fails to meet any performance deadlines established by this Contract, or fails to perform in accordance with the specification, terms, and conditions of this Contract, the Municipalities shall have the right to purchase the services and materials from other sources on the open market or to purchase those items necessary to continue functioning until delivery from Contractor is complete. CVSWMD may deduct as damages from any money due or coming due to Contractor the differences between Contractor's price and the higher price or the costs of temporary items. The Municipalities may require Contractor, at Contractor's sole expense, to re-perform any items of work provided for in this Contract that do not meet the established specifications, standards, or the Municipalities' directives.

Any remedies available to the Municipalities are cumulative and not exclusive. The seeking or exercising by the Municipalities of a remedy does not waive its right to seek or exercise any other remedy available to it at law, in equity, by statute, or under this Contract.

ARTICLE 15: ARBITRATION

Should disputes arise between the Contractor and the Municipalities about this contract or any related matter, the Parties agree to arbitrate any such controversy, pursuant to the Vermont Arbitration Act, 12 V.S.A. § 5651et seq.

ARTICLE 16: CONTRACT DOCUMENTS

This Contract shall constitute the entire agreement between the Parties on the subject matters. All prior agreements, representations, statements, negotiations, and understandings shall have no effect. There shall be no modifications or amendments to this Contract or to the Addendum unless said changes, modifications, or amendments are in writing duly executed by the Parties.

ARTICLE 17: SEVERABILITY

The provisions of this contract are severable, and if a court of competent jurisdiction holds any portion of this contract unconstitutional or invalid, the remainder of this Contract shall not be affected and shall remain in full force and effect.

ARTICLE 18: CORRESPONDENCE/NOTICES

All notices required under this Agreement shall be in writing. Notice from one party to the other under this Agreement shall be deemed to have been properly delivered if:

1) forwarded by United State Postal Service First Class, postage prepaid, as set forth below:

For the Municipalities:
CVSWMD
137 Barre Street
Montpelier, VT 05602

For Contractor:

or

2) sent via e-mail or fax if receipt is confirmed by the other party.

ARTICLE 19: COMPLIANCE WITH LAW

The Contractor shall comply with all applicable Federal, State, and local laws, including but not limited to, the **Are there any local laws that would apply to this contract that should be identified in this Article? Examples from the Chittenden RFP were the Burlington Livable Wage Ordinance and the Burlington Union Deterrence Ordinance...** The Contractor shall supply the required certifications attesting to compliance with these ordinances prior to executing this Contract. Copies of the Ordinances and certifications may be found in Exhibit C.

ARTICLE 20: REGISTRATION

The Contractor agrees to be registered with the Vermont Secretary of State's office as a business entity doing business in the State of Vermont at all time this Contract is effective. This registration must be complete prior to contract execution.

IN WITNESS WHEREOF, the Parties do hereby execute this Contract on the day and year first written above.

CVSWMD

By: _____

Name:

In the presence of:

City of Montpelier

By: _____

Name:

In the presence of:

City of Barre

By: _____

Name:

In the presence of:

CONTRACTOR:

By: _____

Name:

In the presence of:

FY21 DRAFT MUNICIPAL PLAN IMPLEMENTATION TABLE

ECONOMIC DEVELOPMENT

Implement the state-approved Tax Increment Financing (TIF) District for the downtown business district	
Status	The TIF plan and application was prepared and received state approval in 2012
Timing	First debt incurred January 2014. Life of the TIF District is 20 years
Partners	City Clerk/Treasurer, City Planner, Regional Planning Commission, City Manager, City Council, City Assessor
Notes	The TIF District provides a financing tool for significant infrastructure projects to stimulate the development and redevelopment of several properties in the Designated Downtown. These private projects require city investment into parking, transportation, and streetscape in order for them to be built to full capacity

Open a grocery store in Barre City	
Status	There is a recognized need for a large-scale grocery store, but to date no private operators have been interested in locating in Barre City and existing neighborhood stores have not been interested in expanding. This community sentiment bubbled to the surface in a 2004 market study, commissioned by the downtown Barre merchants association (The Barre Partnership). Results of a community survey pointed to the desire for a downtown store. The report highlighted this sentiment and confirmed that grocery stores located in the downtown do indeed contribute to a vibrant community center
Timing	2022
Partners	Granite City Grocery, other grocery retailers, Barre Area Development Corp., The Barre Partnership, Capstone Community Action Council, City Council
Notes	

Complete planning for and implement the Merchant Row project	
Status	A plan for Merchants Row was completed in 2011
Timing	When funding becomes available
Partners	City Planner, Planning Commission, City Manager, City Council, CVRPC
Notes	The Merchants Row plan resolves a number of circulation issues associated with the Merchants Row area of Barre and would transform this bleak area of undifferentiated asphalt to a re-configured urban landscape that includes sidewalks, ADA accessible entrances to Merchants Row shops, public plazas at the Barre Opera House and historic train depot, an alignment for a long planned bike path, designated loading areas and landscaping. Enterprise Aly was completed in 2015, and the updated design of the Merchants Row area would expand upon the work already done

FY21 DRAFT MUNICIPAL PLAN IMPLEMENTATION TABLE

Update planning for and implement the North Main to Summer Street project	
Status	A plan for North Main to Summer Street was completed in 2012
Timing	2022
Partners	City Planner, Planning Commission, City Manager, City Council, Barre Partnership
Notes	The plan’s overall strategy is to focus development and activity along Main and Summer Streets, and provide parking within the center of the blocks in a series of connected ‘parking courts’ that are configured to be user-friendly and convenient, but tied to an urban pattern that places parking behind the buildings and preserves streetscapes for walking and human activity. An update to the plan is needed

HOUSING

Undertake a study to document the occupancy of downtown buildings and recommend strategies to encourage use of upper floors for housing	
Status	No action taken to date
Timing	2022
Partners	Barre Partnership, City Assessment Department, City Planner, Planning Commission, Downstreet Housing
Notes	This study should include an inventory and assessment of the condition, use and occupancy of the upper floors of buildings in the downtown business district. Based on the findings, recommendations should be developed to increase the utilization of upper floor space for housing

Implement a pilot program that would assist with the purchase and management of owner-occupied rental properties in the city	
Status	No action taken to date
Timing	2023
Partners	Downstreet Housing; Capstone Community Action Council
Notes	Downstreet has indicated an interest in partnering with the city on a program that would help buyers purchase and manage owner-occupied rental properties. A new source of funding would need to be found to support the program as it would not be eligible under Downstreet’s current funding streams

FY21 DRAFT MUNICIPAL PLAN IMPLEMENTATION TABLE

Amend the city’s Minimum Housing Code to incorporate stronger and more effective standards	
Status	No action taken to date
Timing	2023
Partners	City Planner, City Fire Department, Vermont Department of Health, Downstreet Housing, City Attorney, City Council
Notes	Barre City has a Minimum Housing Ordinance that could be further amended to strengthen the city’s minimum housing standards. The current code is based on the HUD minimum standards. Consideration should be given to incorporating additional standards related to energy-efficiency and healthy living conditions. The Vermont Healthy Homes Program has produced a rating tool and reference manual that could be consulted, and Burlington’s housing code could be used as a model

Encourage home-sharing as a means of keeping larger single-family homes intact	
Status	No action taken to date
Timing	2021
Partners	City Planner, Downstreet Housing and Community Development; HomeShare Now
Notes	Encouraging home-sharing is one way to avoid conversion of larger homes to rental or multi-family units and would provide additional benefit of helping residents afford and invest in the older housing stock that was at one time prime single-family housing. Rental units within the neighborhoods have begun to depreciate neighboring homes and neighborhoods making them less desirable

Consider implementing a Housing Preservation Loan Program to help with the repairs needed to homes in the City	
Status	No action to date
Timing	2020-2021
Partners	City Council, City Clerk/Treasurer, City Finance Director, City Planner
Notes	Montpelier’s Housing Preservation Loan Program could serve as a model guide to implementing something similar for Barre City

FY21 DRAFT MUNICIPAL PLAN IMPLEMENTATION TABLE

TRANSPORTATION

Develop and adopt a Complete Streets policy	
Status	No action has been taken to date
Timing	2024
Partners	City Planner, City Engineer, Planning Commission, City Engineer, Transportation Advisory Committee, City Council
Notes	The website of the National Complete Streets Coalition provides information about developing a local Complete Streets policy and links to policies adopted by municipalities around the country. In Vermont, Montpelier, the City of Rutland and the City of Burlington have developed Complete Streets policies

Investigate demand for and establish additional scheduled stops as needed along the City Route, City Commuter and Hospital Hill bus routes	
Status	Action has begun in 2018
Timing	discussions and changes by GMTA have had them reviewing policies on off-route pick-ups, larger busses and added stops with additional shelters
Partners	CVRPC, City Planner, Planning Commission, City Engineer, Transportation Advisory Committee, City Council, GMTA
Notes	Opportunities to provide bus service to the high school should be explored, which could reduce downtown traffic generated by students driving or being driven to/from school. Attention should be given to the changes that GMTA is making, and the City should participate in their work

Encourage and support Barre City Elementary and Middle School's (BCEMS) involvement in the Safe Routes to School program	
Status	No action has been taken to date
Timing	2022
Partners	BCEMS, City Planning Commission, City Planner, City Engineer, City Council
Notes	This state/federal program helps to generate enthusiasm around biking/walking to school and can provide financial resources to improve city infrastructure. More information is available online at http://saferoutes.vermont.gov

FY21 DRAFT MUNICIPAL PLAN IMPLEMENTATION TABLE

Identify and take appropriate action with regard to paper streets, particularly those that are limiting the use and development of otherwise suitable lots	
Status	No action has been taken to date
Timing	2022
Partners	City Planner, City Engineer, City Attorney, City Council
Notes	Paper streets are strips of land that were designated for use as a street when a subdivision was initially laid out, but the street was never constructed as planned. The ownership of some of these strips has become uncertain over time. This limits the ability of adjoining land to be developed because the city cannot grant the right to install a street or infrastructure on the strip of land (as originally intended) without the approval of the owner. The city would need to identify the owners of paper streets or institute a legal process to municipal ownership of these strips if no owner can be determined to facilitate development of the adjoining land

Develop and adopt road standards	
Status	The city has a set of road standards, but they have not been formally adopted and are very old
Timing	2024
Partners	City Engineer, City Planner, Transportation Advisory Committee, City Council
Notes	Having an adopted set of road standards would enable the city to qualify for transportation grants. The existing set of road standards should be reviewed to assure that new roads will be accessible to emergency vehicles and that they will incorporate appropriate stormwater infrastructure before being formally adopted. All street segments in Barre City should be classified as arterial, connector or neighborhood streets, and adopted standards for each classification should reflect the appropriate planned usage as described in Section 3. This will also entail revisiting the Streets and Sidewalks Ordinance. This project should take into consideration National Association of City Transportation Officials design guides

FY21 DRAFT MUNICIPAL PLAN IMPLEMENTATION TABLE

Complete a citywide Pedestrian Environment Quality Index (PEQI) and Complete Streets assessment	
Status	No action has been taken to date
Timing	2021
Partners	City Planner, Planning Commission, City Engineer, Transportation Advisory Committee, City Council
Notes	More information about conducting a PEQI assessment is available from the UCLA Center for Occupational and Environmental Health at www.peqiwalkability.appspot.com . There are a number of Complete Streets assessment tools available and examples of assessments completed in communities around the country. Trained volunteers can conduct these assessments, which examine both the physical infrastructure available to pedestrians and whether the overall environment is safe and pedestrian-friendly

Review access management provisions in the city’s land use regulations and update as needed	
Status	No action has been taken to date
Timing	2022
Partners	City Planner, Planning Commission, City Engineer, Transportation Advisory Committee, City Council
Notes	Vermont Agency of Transportation has published an Access Management Guidebook and Best Practices document that include recommended access management provisions. This could be incorporated into the revision of the city’s commercial and industrial zoning districts recommended in the land use chapter

Develop a citywide long-range bicycle and pedestrian plan	
Status	No action has been taken to date
Timing	2024
Partners	City Planner, Planning Commission, Semprebon Bike Path Committee, City Engineer, Transportation Advisory Committee, City Council
Notes	This could build upon the bike path planning work already completed, as well as the PEQI and Complete Streets assessments recommended above. The plan would be tool to help the city prioritize bike and pedestrian improvements, and to coordinate small sidewalk or path projects into an interconnected system that would be completed over time

FY21 DRAFT MUNICIPAL PLAN IMPLEMENTATION TABLE

Complete construction of the bike path through the city	
Status	Final engineering for the path is on-going
Timing	2022
Partners	City Engineer, City Planner, Transportation Advisory Committee, City Council
Notes	Supported by the Semprebond funding, the city should come up with a schedule to complete the Depot-to-Museum segment and the Depot-to-Barre Town segment by 2022

Re-engineer the railroad trestle on Vanetti Place to mitigate flood hazards	
Status	No action has been taken to date
Timing	2022
Partners	City Engineer, Transportation Advisory Committee, City Planner, VTrans, City Council
Notes	This project falls to the responsibility of VTrans. The railroad is using this bridge for the use by the granite train, and city departments have made arrangements to regularly inspect the trestle for debris buildup

Construct Barre’s first traffic circle	
Status	No action has been taken to date
Timing	2022
Partners	City Engineer, Transportation Advisory Committee, City Planner, VTrans
Notes	This project will be considered a text for replacing further uncontrolled or signaled intersections with traffic circles. Candidate locations include Washington and Hill Streets, or North Main and Berlin Streets. Traffic circles should always be considered as a lower maintenance alternative to a signaled intersection

PUBLIC UTILITIES

Prepare and adopt a Capital Improvement Program, which would incorporate the capital improvements needed by city-owned utilities into a municipal capital planning and budgeting process that would include all city departments/services	
Status	A Plan for city vehicles is currently managed through the City
Timing	2021
Partners	City Finance Director, City Manager, City Planner, Planning Commission, Department Heads, Council
Notes	The city could apply for a Municipal Planning Grant to prepare a capital plan & budget

FY21 DRAFT MUNICIPAL PLAN IMPLEMENTATION TABLE

Install guard rails around the city’s reservoir	
Status	No action taken to date
Timing	2025
Partners	City Engineer, City Manager, City Council
Notes	This project is listed in the city’s 2017 Hazard Mitigation Plan as a low priority action. It may be eligible for partial funding from the EPA

Pursue further waste-based economic development, expanding and building upon the success of ReSOURCE’s project at 30 Granite Street	
Status	The solid waste district’s “zero waste” policy and Act 148, which established universal recycling and composting statewide, create an opportunity for economic growth in this sector
Timing	Work currently underway and continuing in subsequent years
Partners	City Manager, City Planner, Barre Area Economic Development
Notes	

ENERGY

Continue the support of the Barre City Energy Committee (BCEC) to coordinate the city’s energy planning, efficiency, conservation and generation efforts	
Status	Ongoing
Timing	Ongoing
Partners	BCEC, City Manager, City Council
Notes	One of the main tasks of the city’s energy committee is and has been to increase residents’ awareness of the technical assistance and funding already available through Efficiency Vermont and other programs to audit, weatherize and otherwise improve the energy efficiency of homes and buildings in the city

Schedule and continue to complete energy efficiency upgrades to city-owned buildings	
Status	Energy audits have been completed at most city-owned buildings. The recommended energy efficiency upgrades need to be prioritized and scheduled
Timing	Schedule completed in 2013 with projects underway in subsequent years
Partners	City Manager, City Council
Notes	Energy efficiency upgrades to city facilities should be incorporated into the comprehensive Capital Improvement Program recommended in the Utilities chapter of this plan

FY21 DRAFT MUNICIPAL PLAN IMPLEMENTATION TABLE

Consider implementing the voter-approved Property Assessed Clean Energy (PACE) program	
Status	City voters approved creation of a PACE District in 2012
Timing	2022
Partners	City Manager, City Council, BCEC
Notes	Following 2011 legislative changes, the Vermont Department of Financial Regulation issued updated guidelines for PACE Districts in April 2012 that address many of the uncertainties associated with and questions raised by the Federal Housing Finance Agency about this program. Efficiency Vermont is now able to administer a PACE program on behalf of a municipality with the associated fee borne by program participants

Adopt energy-efficiency standards for rental units, particularly those that do not include heat as part of the rent	
Status	No action taken to date
Timing	2023
Partners	BCEC, Fire Department, City Planner, City Manager, City Council, Capstone Community Action Council
Notes	City of Burlington’s Minimum Energy Efficiency Standards Ordinance is an example of such an ordinance. This task could be incorporated into the broader revisions to the minimum housing code recommended in the Housing chapter

COMMUNITY SERVICES AND AMENITIES

Prepare and adopt a Capital Improvement Program, which would incorporate the capital improvements needed to city buildings and facilities into a municipal capital planning and budgeting process that would include all city departments/services	
Status	A capital equipment plan was developed in 2013
Timing	2022
Partners	City Finance Director, City Manager, City Planner, Planning Commission, Public Works Director, City Department Heads, City Council
Notes	The city could apply for a Municipal Planning Grant to prepare a Capital Improvement Program

FY21 DRAFT MUNICIPAL PLAN IMPLEMENTATION TABLE

Enroll in the National Flood Insurance Program’s Community Rating System	
Status	Not started yet
Timing	2021
Partners	City Manager, City Planner, Fire Department, City Council
Notes	The National Flood Insurance Program’s Community Rating System is a voluntary incentive program that recognizes and encourages community floodplain management activities that exceed the minimum federal requirements. As a result, flood insurance premium rates are discounted to reflect the reduced flood risk

Develop and adopt a citywide Parks and Recreation Plan	
Status	No action to date
Timing	2022
Partners	Recreation Director, City Planner, Planning Commission, City Council
Notes	This action could be coordinated with development of the Open Space Plan and/or Bicycle and Pedestrian Plan

NATURAL ENVIRONMENT

Enroll in the National Flood Insurance Program’s Community Rating System	
Status	No action taken to date
Timing	2022
Partners	City Manager, City Planner, Fire Department, City Council
Notes	The National Flood Insurance Program’s Community Rating System is a voluntary incentive program that recognizes and encourages community floodplain management activities that exceed the minimum federal requirements. As a result, flood insurance premium rates are discounted to reflect the reduced flood risk

Develop and adopt a river management plan	
Status	No action taken to date
Timing	2023
Partners	City Planner, Planning Commission, Friends of the Winooski River, CVRPC
Notes	This plan would build upon the Phase I and Phase II geomorphic assessments and Stevens Branch Corridor Management Plan and more specifically address the specific, local challenges and opportunities presented by the river as it flows through our city

FY21 DRAFT MUNICIPAL PLAN IMPLEMENTATION TABLE

Develop and adopt a citywide Open Space Plan	
Status	No action taken to date
Timing	2022
Partners	City Planner, Planning Commission, City Council
Notes	This action could be coordinated with development of the Parks and Recreation Plan

Study the feasibility of and options for establishing a greenway with a multi-use path along the Stevens Branch	
Status	Underway for Summer and Fall 2020
Timing	2023
Partners	Consultants; Public Works Director; Recreation Committee; Paths, Routes and Trails Committee
Notes	The Metro Way Multi-Use Path has been designed and construction will occur during the 2020 construction season. This path will be a continuation of the multi-use path off the Enterprise Alley parking lot and will start at the intersection of Metro Way and Williams Lane, and will end at Prospect Street

Complete the projects listed in the 2018 Central Vermont Tri-Town Stormwater Master Plan	
Status	No action taken to date
Timing	2023
Partners	CVRPC, City Planner, City Engineer, City Council
Notes	There are 72 stormwater best management practices sites that range from small changes to large construction type installments. Working on a few each year would go a long way to meeting those challenges that were identified in the Plan

LAND USE

Complete planning for and implement the Merchants Row project	
Status	Planning for, including some of the environmental studies have been completed
Timing	2021
Partners	City Planner, Planning Commission, City Manager, City Council, Public Works Director
Notes	Potential grant funding should be pursued, and the design phase of the project could be underway in 2021

FY21 DRAFT MUNICIPAL PLAN IMPLEMENTATION TABLE

Update and implement the North Main to Summer Street Plan	
Status	plans have been completed for this project, and the plan was endorsed in March of 2012
Timing	2021
Partners	City Planner, Planning Commission, City Manager, City Council
Notes	Downstreet Housing has built their office/apartment building in the area this plan talks about, as well as the City having constructed the Pearl Street Pedestrian Way. With these changes, the plan should be revisited and revised as necessary to update the goals and desires this plan sets forth

Complete review for implementation of a Design Review Committee	
Status	No action to date
Timing	2021
Partners	Planning Director, Permit Administrator, Development Review Board, Planning Commission, Barre Historical Society
Notes	Look into creating a design review committee as laid out in the Unified Development Ordinance. Their work would assist the Planning Department and the Development Review Board with issues related to the designated downtown historic district and other related items

Council Approved: June 30, 2020

Updated: June 17, 2021 (Jody)

MAYORAL APPOINTMENTS

JULY 1, 2020 – JUNE 30, 2021

BARRE HOUSING AUTHORITY

Five Year Terms*

Dan Molind	Term expires 2023
Mary Ellen LaPerle	Term expires 2025
Linda Long	Term expires 2026
Brian Amones, Esq., Chair	Term expires 2025
Chad Bell	Term expires 2023

Executive Director – Charles W. “Chip” Castle

*BHA terms expire on November 24th

CAPSTONE COMMUNITY ACTION COUNCIL

BOARD OF DIRECTORS

One Year Terms

Jon Valsangiacomo	Term expires 2022
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CITY COUNCIL APPOINTMENTS

July 1, 2020 – June 30, 2021 *

One Year Terms

City Manager	Steven E. Mackenzie, P.E.
City Attorney	Oliver Twombly, Esq.
Labor Attorney	J. Scott Cameron, Esq.
Director of Emergency Management	Douglas Brent
Energy Coordinator	Jeff Bergeron
Library Trustee Council Liaison	Teddy Waszazak
Health Officer†	Robert Howarth
Deputy Health Officer†	Robbie Strachan
Tax Collector	Carolyn Dawes
Administrative Officer for Zoning	Janet Shatney
Central Vermont Internet Board	Greg Kelly
Central Vermont Internet Board - Alternate	Jonathan Williams

*(Unless otherwise provided by an Employment Agreement)

July 1, 2020 – June 30, 2022

Two Year Terms

Central Vermont Regional Planning Commission Alternate Designate	Janet Shatney Heather Grandfield
Central Vermont Public Safety Authority	Jim Ward
Central Vermont Public Safety Authority	Paul Charron
Central Vermont Solid Waste Management Board of Directors Alternate	Steven Micheli William Ahearn

October 9, 2019 – October 9, 2022

Three Year Terms

Board of Health*	Peter Anthony Steven Micheli Carolyn Dawes
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* Vermont Department of Health appoints these Officers at City Council's recommendation.

CITY MANAGER APPOINTMENTS

One Year Terms

Police Chief	Timothy Bombardier
Fire Chief	Douglas Brent
Chief Inspector – Minimum Housing Standards	Douglas Brent
Director of Finance	Dawn Monahan
Director of Planning, Permitting & Assessing	Janet Shatney
Director of Public Works	Bill Ahearn
Director of Buildings & Community Services (BCS)	Jeffrey Bergeron
Assistant Director of BCS - Recreation	Stephanie Quaranta
Superintendent of Water/Wastewater	Steven Micheli
Tree Warden	Jeffrey Bergeron
Grants Administrator	Janet Shatney
CVRPC TAC Representative	Scott Bascom
Building Official	Janet Shatney
Interim Assessor	Janet Shatney
City Social Networking Moderator	Jody Norway

BOARDS, COMMISSIONS AND COMMITTEES*
(MAYOR IS EX-OFFICIO MEMBER OF ALL COMMITTEES
APPOINTED BY THE BARRE CITY COUNCIL)

**Unless otherwise noted, the following Committee Appointments are effective for
Fiscal Year 2022 (July 1, 2021 – June 30, 2022)*

AMERICAN’S WITH DISABILITIES (ADA) COMMITTEE
Two Year Terms

Ericka Reil, Chair	Term expires 2023
Dena Estivill	Term expires 2023
Hilary Cole, BHA	Term expires 2022
Bernadette Rose	Term expires 2023
Marichel Vaught	Term expires 2022

Primary Staff: Jeffrey Bergeron, ADA Coordinator, Director of Buildings & Community Services
Meets 3rd Thursday of each month at 10:00 a.m. in City Council Chambers.

ANIMAL AND FOWL TASK FORCE

Kerri Fredette, Chair	Term expires 2022
Heather Pipino, Vice Chair	Term expires 2022
Heather Runk, Secretary	Term expires 2022
Amy Dickinson	Term expires 2022
John Lepage	Term expires 2022

Primary Staff: Robert (Howie) Howarth, Fire Marshall, Code Enforcement
Meets 4th Wednesday of each month at 6pm.

BARRE CITY ENERGY COMMITTEE

Two Year Terms

Elaine Wang, Chair	Term expires 2021
Conor Teal, Vice-Chair	Term expires 2021
Phil Cecchini	Term expires 2022
VACANT	Term expires 2021
VACANT	Term Expires 2021

Primary Staff: Janet Shatney, Director of Planning, Permitting and Assessing
Alternate: Jeffrey Bergeron, Director of Buildings & Community Service
Efficiency Vermont Advisor – Brad Long, Community Engagement Manager
Meets the 4th Monday of each month at 5:30 p.m. in the City Council Chambers.

Committee will elect officers at the Monday, June 28, 2021 committee meeting.

CEMETERY AND PARKS COMMITTEE

Two Year Terms

Giuliano Cecchinelli, Chair	Term expires 2022
Ilene Gillander	Term expires 2023
Norena Zanleoni	Term expires 2023
Starr LeCompte	Term expires 2022
Mark Gherardi, BGA Liaison	Term expires 2022
Heather Richie	Term expires 2023

Primary Staff: Jeffrey Bergeron, Director of Buildings & Community Services (BCS)
Alternate: Stephanie Quaranta, Assistant Director of BCS - Recreation
Meets 3rd Monday of every month (March through Oct) at 11:00 a.m. at Alumni Hall

CIVIC CENTER ADVISORY COMMITTEE

Two Year Terms

Sue Higby, Chair	Term expires 2023
Arthur Dessureau, Vice Chair	Term expires 2022
Richard Dente	Term expires 2023
Brent Gagne	Term expires 2023
Charlie Atwood	Term expires 2022
Brad Ormsby	Term expires 2022
Jon Valsangiacomo	Term expires 2023

Primary Staff: Jeffrey Bergeron, Director of Buildings and Community Services
Alternate: Stephanie Quaranta, Assistant Director of BCS – Recreation
Meets the 2nd Tuesday of each month at 8:00 a.m. in the Alumni Hall Conference Room.

COMMUNITY GARDEN COMMITTEE

Two Year Terms

Amanda Garland, Chair	Term expires 2022
Ellen Sivret	Term expires 2022
John LePage	Term expires 2022
Dawn Magnus	Term expires 2023
Hannah Morgan	Term expires 2023

Primary Staff: Jeff Bergeron, Director of Buildings and Community Services
Meets the 2nd Wednesday of each month, at 4pm, at the Aldrich Library.

COW PASTURE STEWARDSHIP COMMITTEE

Two Year Terms

Chris Russo-Fraysier, Chair	Term expires 2022
Janette Shaffer	Term expires 2023
Tim Rapczynski	Term expires 2022
Fabienne Pattison	Term expires 2023
Carl VanOsdall	Term expires 2022
Jim Deshler	Term expires 2022

Primary Staff: Steve Mackenzie, City Manager
Meets the 3rd Thursday of every other month at 5:30 p.m. in the Council Chambers.

DIVERSITY & EQUITY COMMITTEE

Two Year Terms

Joelen Mulvaney, Chair	Term expires 2023
Marichel Vaught, Vice-Chair	Term expires 2023
Danielle Owczarski, Secretary	Term expires 2022
Ellen Kaye	Term expires 2022
William Toborg	Term expires 2022
Christopher Roberts	Term expires 2023

Primary Staff Liaison: Steve Mackenzie, City Manager
Meets: on the third Monday of the month at 6pm, Virtual until further notice

DEVELOPMENT REVIEW BOARD

Four Year Terms

Ward I:	Linda Shambo, Chair	Term expires 2025
	Jeffrey Tuper-Giles, Vice Chair	Term expires 2023
Ward II:	David Hough	Term expires 2023
	Richard Deep	Term expires 2022
Ward III:	Katrina Pelkey	Term expires 2023
	James Hart, III	Term expires 2022
At Large:	Denise Ferrari	Term expires 2025
	VACANT	Term expires 2025
	Jessica Egerton	Term expires 2022

Primary Staff: Heather Grandfield, Permit Administrator

Alternate: Janet Shatney, Director of Planning, Permitting, and Assessing

Meets the 1st Thursday of each month at 7:00 p.m. in the Council Chambers.

DOG PARK COMMITTEE

Two Year Terms

Jeff Cochran, Chair	Term expires 2023
Danielle Ballenger, Secretary/Treasurer	Term expires 2023
VACANT	Term expires 2023
VACANT	Term expires 2022

Primary Staff: Jeff Bergeron, Director of Buildings and Community Services

Meets on the third Wednesday of the month, quarterly, at 6:00pm in the City Council Chambers.

ORGANICS DIVERSION COMMITTEE

Two Year Terms

Steve Micheli	Term expires 2023
John LePage	Term expires 2023
Samn Stockwell	Term expires 2022

Primary Staff: Steve Micheli

Meets: As needed

PATHS, ROUTES AND TRAILS COMMITTEE
(Formerly: Charles Semprebon Memorial Bike Path Committee)

Two Year Terms

Scott Bascom, Chair	Term expires 2023
Dan Souza	Term expires 2023
Mark Martin	Term Expires 2022
Giuliano Cecchinelli	Term Expires 2022
Tim Terway	Term Expires 2023
Karen Nelson	Term Expires 2023

Primary Staff: Stephanie Quaranta, Assistant Director of BCS – Recreation (Chair)

Alternate: Steven E. Mackenzie, P.E., City Manager

Meets 2nd Wednesday of every month at 5:00 p.m. in the City Council Chamber.

PLANNING COMMISSION

Three Year Terms

David Sichel, Chair	Term expires 2022
Jacqueline Calder, Vice Chair	Term expires 2023
Michael Hellien, Secretary	Term expires 2023
Thomas Lauzon	Term expires 2023
Amanda Gustin	Term expires 2023
Rachel Rudi	Term expires 2023
Jim McWilliam	Term expires 2022

Primary Staff: Janet Shatney, Director of Planning, Permitting, and Assessing

Meets the 2nd and 4th Thursday of each month at 6:30 p.m. in the Council Chambers.

POLICE ADVISORY COMMITTEE

Two Year Terms

Bob Nelson, Chair	Term expires 2023
Steve England, Vice Chair	Term expires 2022
Kristin Beaudin	Term expires 2022
Reina Dean	Term expires 2022
Alexander Raeburn	Term expires 2023

City Council Liaison: Teddy Waszazak

Primary Staff: Police Chief Tim Bombardier

Meets the 2nd Monday of each month at 6pm, Council Chambers

PUBLIC ART COMMITTEE

Two Year Terms

Jeffery Tuper-Giles, Chair	Term expires 2022
Jason Broughton	Term expires 2022
Taryn Haas	Term expires 2023
Randall Kuhlman	Term expires 2023
Alexander Raeburn	Term expires 2023

Primary Staff: Carol Dawes

Meets: TBD

RECREATION COMMITTEE

Two Year Terms

Linda Couture, Chair	Term expires 2022
Brett Rubinate	Term expires 2022
Kelly Ross	Term expires 2022
Janelle Starr	Term expires 2023
Nancy Wolfe	Term expires 2023

Primary Staff: Stephanie L. Quaranta, Assistant Director of BCS (Chair)

Meets the 1st Monday of each month at 5pm, Alumni Hall

TRANSPORTATION ADVISORY COMMITTEE

Two Year Terms

Giuliano Cecchinelli, Chair	Term expires 2021
Michael Hellien, Vice Chair	Term expires 2022
Arthur Bombardier	Term expires 2021
Jake Hemmerick	Term expires 2023
Joanne Reynolds	Term expires 2023

Primary Staff: Bill Ahearn, Director of Public Works

Alternate: Larry Eastman, Deputy Police Chief

Meets the 3rd Wednesday of the month at 6:30 p.m., City Council Chambers.

TREE STEWARDSHIP COMMITTEE

Two Year Terms

Amanda Garland, Chair

Term expires 2022

Niko Rubin

Term expires 2022

Nathan Ebert

Term expires 2022

Conor Teal

Term expires 2022

Amy Galford

Term expires 2023

Primary Staff: Jeff Bergeron, Director of Buildings and Community Services

Meets the 1st Monday of each month, 5:30 pm, at The Aldrich Public Library



Steven E. Mackenzie, P.E.
City Manager

• *City of Barre, Vermont*

“Granite Center of the World”

6 N. Main St., Suite 2
Barre, VT 05641
Telephone (802) 476-0240
FAX (802) 476-0264
manager@barrecity.org

To: Mayor Lucas Herring and the Barre City Council

From: Steven Mackenzie, P.E., City Manager

Re: Department Head Reports

Report Date: June 18, 2021

In order to keep you informed of the Department activities of the office, I'm forwarding this report of activities of the City staff for the previous Friday - Thursday. If there are any additional questions please do not hesitate to ask.

1. CLERK/TREASURER'S OFFICE:

- **COVID REPORT:** City Hall reopens to the public starting this coming Monday, June 21st. Appointments will no longer be necessary for those doing research in the vault.
- Received the final draft of the State Auditor's TIF audit. The City has 2 weeks to submit a management response before the final audit is issued.
- We have received a number of abatement requests since our last hearing in February 2020. Now that the Governor's emergency order has expired and we can hold in-person meetings again, we'll schedule the hearings in the near future.
- The Clerk will ask Council to set the FY21-22 property tax quarterly payment deadlines at the June 22nd meeting. The first quarter deadline will be moved from August 15th to September 15th due to the delay in receiving the education tax rates caused by the late approval of the BUUSD school budget.
- The Clerk is working with the Planning Director/Interim Assessor on the schedule for lodging of the abstract grand list, grievance hearings, and the final lodging of the grand list. These steps are required before the Council can approve the municipal tax rate. It is anticipated the Council will approve the tax rate at the July 27th meeting.
- There was a hearing for the Brian Judd v. City of Barre election challenge on June 15th at 3PM. There was discussion on evidence, and Mr. Judd requested and was granted a continuance. The next hearing is scheduled for June 29th, and is expected to conclude the case. It will be conducted electronically.
- The utility arrearage assistance program is being offered again to help customers with delinquent water/sewer bills, however it is only available to residential renters who pay their water/sewer bills directly to the City. This will significantly limit the number of qualifying customers. Information about the program has been shared on FB, the website, and Front Porch Forum.

- The City has posted information on Front Porch Forum and the website about the mortgage assistance program being offered by the state with COVID relief funds.

2. BUILDING AND COMMUNITY SERVICES:

- I participated in a pool project update Zoom meeting on Monday morning.
- Also on Monday, I attended the “in person” Cemetery Committee meeting in Alumni Hall.
- On Tuesday, I participated in the Zoom Department Head meeting.
- Also on Tuesday, I met with, and sold a lot to, a family at Hope Cemetery.
- On Wednesday, I received and reviewed bids for the pool bath house re-roofing project.
- On Thursday, I participated in the ADA Committee Zoom meeting.
- Also on Thursday, I participated in a conference call with representatives from the Vermont Food Bank and the State’s “Farm to Families” program. We are looking to utilize the Civic Center parking lot to expand the program into the Central Vermont area.
- On Friday, I participated in the pool project update Zoom meeting.
- On Monday, the Facilities crew prepared the AUD for basketball as we have a group of high school teams playing a “summer league” one night a week for the next six weeks. The crew spent the rest of the week assisting with the pool project, mowing and trimming the parks and playgrounds and spent one day mowing and trimming at St. Monica’s Cemetery.
- The Cemetery crew mowed and trimmed at both Elmwood and Hope as well as trimming at St. Monica’s. We had three cremation inurnments this week. We also worked on preparing two more lots for foundation work.

2a. RECREATION:

- Attended 2 swimming pool renovation update meetings.
- Attended Department Head Meeting
- Attended Summer Matters Grant Financial Reporting meeting.
- Attended and successfully completed my Lifeguard Training Recertification. We have a Director/Assistant and 3 Lifeguards. One individual was certified in this latest class for the first time and 4 of us received recertifications (counting mine). We are in need of more Lifeguards in order to have a full schedule. Most communities are looking for Lifeguards as well as employees in general. We will work hard to cover all shifts but safety will be a deciding factor. We hope more applicants will come forward.
- Telephone inquires/emails pertaining to Rotary Park shelter scheduling and school playground reservations.
- Emails and telephone calls pertaining to the pool.
- The majority of the week was spent reworking the Summer Matters Grant as the original budget item needed to be reworked. Special thanks to Finance Director Dawn Monahan who spent many hours assisting with figures, etc. In the end everything was accepted and papers signed, emails, etc. The grant will assist with the cost of some programs and the pool. This has delayed getting a lot of information out until we knew we if we were successful with our request. A thank

you to Planning Director Janet Shatney and the City Manager for their assistance as we navigated round2.

- The Finance Director assisted in helping me set up templates on my computer.
- Worked on first aid supplies and equipment for the pool as well as setting up information for the Payroll Department, etc. Worked on pool signage, reprogrammed the cash register, etc.
- Updated social media.

3. DEPARTMENT OF PERMITTING, PLANNING AND ASSESSING:

Planning – Janet:

- Working primarily as the acting Interim Assessor (see below);
- Department Head meeting Tuesday morning, talked primarily of the opening plan;
- Spent time with City Manager during my bi-weekly coordination meeting to go over some priorities and outstanding items;
- Attended the TIF spring monitoring visit virtually with City Clerk, City Manager and VEPC folks;
- Sent welcome packet and email to new member of the Planning Commission;
- Updated website with new appointment to the Planning Commission;
- Set agenda with Planning Commission chair Friday and set out;
- Answering questions, phone calls, assisted fellow staff, timesheets, weekly report write-up, etc.

Permitting – Heather:

- Issued 2 electrical permits;
- Issued 1 building permit after approval by the fire marshal's review;
- Processed incoming rental registry invoices – based on our list, we are at 45% and \$48,300 collected;
- Sent out the DRB decision with minutes to the applicants and participants from the June hearing;
- Researched files for several vacant lots requested by the Engineering Technician;
- Phone calls and emails continue with applicants, answering questions, etc.;
- Updated both zoning and the fire department's software for address changes, permit copies, etc.;
- Out Tuesday, Thursday afternoon and Friday.

Assessing Clerk – Kathryn:

- Regular office tasks: permit copies from Heather into databases, address changes, mapping updates, filing, checking Grand List items, Street numbers, corrections, e-mail messages, phone calls, etc.;
- Processed 5 PTTR's (property transfer return) for updating all property records in NEMRC, ProVal, and mapping software;
- Sent out 9 map copies and 13 lister cards as requested via email or by telephone;
- Processed 10 change of appraisal cards to add into the NEMRC and ProVal systems;
- Downloaded 63 homestead filings for a total of 1,691 to date;
- Continue working on the 2020 Sales Study from the data sent by the State (out late);
- Continue cleaning up discrepancies between the now updated Assessing software and NEMRC, for missing inactive or otherwise parcels, span # discrepancies, etc.;
- Continue updating the Veteran status on properties from the Veterans Department for the upcoming grand list.

Assessor-Janet:

- Continue working on permit list of items that might be added to revisions of the grand list;
- Gave to the Clerk 11 change cards for the working grand list;
- Reviewing changes and additions in the software;
- Worked on the cell equipment concern on the top of North Barre Manor to determine its taxable (or not) status from the prior assessor;
- Working on understanding and clarifying the valuation of subsidized housing and how to apply the reductions;
- Working on understanding and clarifying the covenant housing valuations and ensuring they've all been applied correctly;
- Department Director checks email and phone inquiries;
- Department Director has also sent out lister cards upon inquiry by realtors, etc.

4. DEPARTMENT OF PUBLIC WORKS:

06-10 Water 6 Moonlight Dr. water off/on, Meeting @ City Hall, Perry St. water line project

Sewer Pump Station, Water line and manhole install on Perry St., Meeting @ City Hall

Street Perry St. water line installation, Painting @ Municipal Pool, paperwork, maintenance of DPW Truck #4 and Water Dept. Van

- **06-11 Water** West Hill Tank, 99 Smith St. Meter in water on, 6 West St. Water off and meter out, Ayers St. intersection road box repair, Rudd Farm Drive locate main. Perry St. water line project

Sewer Pump Station, Sewer maintenance, Perry St. Water Line project

Street Street sweeping, Water Line project Perry St., Municipal Pool Project fence installation dig holes and set posts and painting of pool, Perry St. sidewalk rebuild, paperwork, pick up trash on Main St., Police Vehicle #5, fire Dept. Chief car, Water Ambulance van

- **06-14 Water** Perry Street Water line project, West Hill Tank

Sewer Pump Station, Camel maintenance, 5 Corti Street sewer cleaned line then checked in basement of house, Surface sewer maintenance

Street Hauling material from Farwell Street site to shop,
Sidewalk rebuilding on Perry Street, paperwork, Perry Street water

line project, (2) street workers at Waste Water Treatment plant, maintenance on John Deere K624 and truck #16

✓ **06-15 Water** Perry Street water project, Construction meeting at City Hall,

Sewer Pump Station, Cleaning lines Vine Street, Prospect Street by City Hall, sewer maintenance, Construction meeting at City Hall, Camel maintenance

Street Municipal Pool fencing and post installation, Water line on Perry Street, paperwork, Construction Meeting at City Hall, Fix stop light on Hill Street, helped out at the Waste Water Treatment Plant, repairs to Police Dept. car #5, Water Dept. Van

✓ **06-16 Water** West Hill Tank, Hydrant repair on Blackwell Street, Maintenance and services, Perry Street water line project, paperwork

Sewer Pump Station, Perry Street water line, Waste Water Treatment Plant, cleaning Sewer lines 31 Spaulding Street, TV'D Green Street sewer and drain on Bridgeman Street, Sewer maintenance

Street Municipal Pool Fencing, Perry Street water line, paperwork, Hot box pot hole patching, repairs to Water van, DPW Truck #38, Cemetery truck #40, Sewer Vac-Con & DPW truck #40

5. FINANCE DIRECTOR:

- Worked on VLCT's annual compensation survey
- Prepared journal entries for grant state payments rec'd via ACH and assisted Asst. Treasurer reconciling the account
- Attended Summer Matters Grant financial training
- Attended DH meeting via zoom
- Worked with Recreation Director on Summer Matters grant budget
- Created templates for Recreation Director for tracking grant expenditures and misc. items more efficiently
- Reviewed financial information on PD Grant requisitions
- Attended VTGFOA Summer workshop and annual meeting
- Met with City Manager and HR Administrator regarding carry-over leave
- Assisted several staff members with carry-over leave payout questions/procedures

- Sr. Accounting Clerk out majority of week
- DH off on Friday

6. DEPARTMENT OF PUBLIC SAFETY:

6a. FIRE DEPARTMENT:

Weekly Fire Activity Report to follow this memo.

6b. POLICE

Police Media Logs to follow this memo.

Media Log Report

Rev.01/26/12

From: 06/10/2021 0:52

To: 06/17/2021 0:34

Date/Time	Incident #	Call Type	Location
ORI: VT0120100 <u>Barre City Police Department</u>			
6/17/21 0:34	21BA004825	Fire - Other	S Main St
fire-other s main st			
6/16/21 23:39	21BA004824	Traffic Stop	Seminary St
traffic stop maple Ave			
6/16/21 22:56	21BA004823	Traffic Stop	Hill St
Traffic stop for speeding on Hill Street.			
6/16/21 22:47	21BA004822	Directed Patrol - Motor Vehicle	Maple Ave / Seminary St
directed patrol maple ave			
6/16/21 22:12	21BA004821	Directed Patrol - Motor Vehicle	Hill St
Directed patrol- Traffic enforcement on Hill Street			
6/16/21 20:03	21BA004820	Traffic Stop	Hill St / S Main St
Traffic stop on Hill Street for defective equipment.			
6/16/21 19:30	21BA004819	Directed Patrol - Motor Vehicle	Washington St
Directed patrol- Traffic enforcement on Washington Street.			
6/16/21 18:41	21BA004818	Assist - Public	Division St
public assist barre city			
6/16/21 17:47	21BA004817	Supervisory Duties - Case review	Fourth St
Supervisory Duties- Case Review			
6/16/21 17:32	21BA004816	Assist - Motorist	VT Rt 62 / Berlin St
motorist assist rt 62			
6/16/21 17:16	21BA004815	TRO/FRO Service	N Main St
TRO service barre city			
6/16/21 17:12	21BA004814	Property - Found	Fairview St
found property fairview st			
6/16/21 17:08	21BA004813	Roadway Hazard	Perry Street
roadway hazard perry st			
6/16/21 16:37	21BA004812	TRO/FRO Entry/Removal	Fourth St
TRO/FRO Entry/Removal			
6/16/21 16:02	21BA004811	Traffic Stop	Richardson Rd / Spring Hollow
traffic stop Richardson Rd			
6/16/21 15:52	21BA004810	Digital Forensics	Fourth Street
Digital Forensics			
6/16/21 15:30	21BA004809	Assist - Other	Fourth St
assist other n main st			
6/16/21 15:09	21BA004808	Traffic Stop	Summer St / Campbell Pl
Traffic Stop			
6/16/21 15:03	21BA004807	Suspicious Event	Blackwell St
suspicious event blackwell st			
6/16/21 14:52	21BA004806	Alcohol Offense	N Main St
alcohol offense n main st			
6/16/21 14:49	21BA004805	Trespass	N Main St
Trespass			

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ORI: VT0120100		<u>Barre City Police Department</u>	
trespass n main st			
6/16/21 14:42	21BA004804	Suspicious Event	Merchants Row
suspicious event merchants row			
6/16/21 14:27	21BA004803	Search Warrant	Fourth St
6/16/21 12:48 21BA004802 Traffic Stop Summer St / Keith Ave			
Traffic stop on Summer St.			
6/16/21 11:58	21BA004801	Disturbance	N Main St
disturbance n main st			
6/16/21 11:48	21BA004800	Assist - Agency	Summer St
agency assist summer st			
6/16/21 11:19	21BA004799	Assist - Agency	Auditorium Hill
agency assist barre city			
6/16/21 11:06	21BA004798	Suspicious Event	S Main Street
suspicious event s main st			
6/16/21 11:05	21BA004797	Animal Problem	S Main Street
Report of a loose dog at The Hollow Inn			
6/16/21 9:58	21BA004796	Assist - Agency	Fourth St
6/16/21 9:45 21BA004795 Attempt To Locate Highgate Dr			
Attempt to locate wanted subject at Highgate			
6/16/21 9:37	21BA004794	Assist - Public	Highland Ave
public assist highland ave			
6/16/21 9:30	21BA004793	Motor Vehicle Complaint	S Main St
Report of an abandoned vehicle on South Main St.			
6/16/21 9:25	21BA004792	Threats/Harassment	Fecteau Circle
threats/harassment barre city			
6/16/21 8:54	21BA004791	Trespass	S Main St
trespass s main st			
6/16/21 8:52	21BA004790	Assist - Public	Fourth St
public assist barre city			
6/16/21 8:32	21BA004789	Assist - Public	Fourth St
6/16/21 8:29 21BA004788 Motor Vehicle Complaint Mill St			
Motor vehicle complaint on Mill Street			
6/16/21 7:43	21BA004787	Assist - Public	Fourth St
public assist n main st			
6/16/21 7:36	21BA004786	Assist - Other	N Main St
assist other n main st			
6/16/21 7:07	21BA004785	Larceny - from Building	Washington St
C. W. advised she cannot find her wallet. Thinks maybe someone came into her apartment and took it.			

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6/16/21 1:08	21BA004784	<i>Assist - Agency</i>	Branch St
6/16/21 0:36	21BA004783	<i>Assist - Public</i>	Jefferson St
6/15/21 22:34	21BA004782	<i>Noise</i>	Church St
6/15/21 22:27	21BA004781	<i>Welfare Check</i>	Eastern Ave
6/15/21 22:19	21BA004780	<i>Suspicious Event</i>	North Main St
6/15/21 20:33	21BA004779	<i>Assist - Public</i>	N Main St
6/15/21 20:19	21BA004778	<i>TRO/FRO Service</i>	Bolster Ave
6/15/21 19:50	21BA004777	<i>Traffic Stop</i>	Washington St / French St
6/15/21 19:35	21BA004776	<i>Traffic Stop</i>	Washington St / Hill St
Traffic Stop for Speeding on Hill Street.			
6/15/21 19:31	21BA004775	<i>Directed Patrol - Motor Vehicle</i>	Hill St
6/15/21 19:19	21BA004774	<i>Traffic Stop</i>	Brook St / Laurel St
Traffic stop on Brook St.			
6/15/21 18:42	21BA004773	<i>Assist - Public</i>	S Main St
6/15/21 18:30	21BA004772	<i>Traffic Stop</i>	Currier Park
Traffic stop for registration violation			
6/15/21 16:40	21BA004771	<i>Welfare Check</i>	Keith Ave
Welfare check on Keith Avenue			
6/15/21 15:42	21BA004770	<i>Trespass</i>	North Main St #
6/15/21 15:35	21BA004769	<i>Vandalism</i>	N Main St
6/15/21 15:25	21BA004768	<i>Motor Vehicle Complaint</i>	South Main St / Cumberland Farms
Motor vehicle complaint on South Main Street			
6/15/21 15:17	21BA004767	<i>Accident - Property damage only</i>	N Main St / S Seminary St
Minor two vehicle collision on North Main St.			
6/15/21 14:45	21BA004766	<i>Suicide</i>	Union St
6/15/21 14:39	21BA004765	<i>Intoxication</i>	Blackwell St
Intoxicated male on the railroad tracks off Blackwell St.			
6/15/21 13:24	21BA004764	<i>Motor Vehicle Complaint</i>	Lawrence Ave

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ORI: VT0120100 <u>Barre City Police Department</u>			
Report of a vehicle regularly speeding on Lawrence Avenue			
6/15/21 12:07	21BA004763	Welfare Check	Cliff St
Welfare check on Cliff St.			
6/15/21 11:34	21BA004762	Assist - Public	North Main St
Public assist N. Main St.			
6/15/21 11:29	21BA004761	Assist - Public	Fairview St
Citizen assist on Fairview St.			
6/15/21 11:28	21BA004760	Assist - Public	
Public assist on Cliff St.			
6/15/21 9:32	21BA004759	Disturbance	Smith Street
Female served trespass notice for a private residence on Smith St.			
6/15/21 9:19	21BA004758	Parking - General Violation	Merchant Row
Parking issues on Merchants Row.			
6/15/21 8:48	21BA004757	Directed Patrol - Other	Fourth St
6/15/21 6:14	21BA004756	Traffic Stop	S Main St
6/15/21 6:01	21BA004755	Directed Patrol - Motor Vehicle	West Patterson Street
Directed patrol on West Patterson St.			
6/15/21 5:01	21BA004754	Directed Patrol - Motor Vehicle	Hill Street
Speed enforcement on Hill St.			
6/14/21 22:59	21BA004753	Assist - Other	Cliff St
assist other cliff st			
6/14/21 22:46	21BA004752	Domestic Disturbance	Highgate Dr
domestic disturbance highgate dr			
6/14/21 22:33	21BA004751	Suspicious Vehicle	Parkside Terrace
Suspicious Vehicle on Parkside Terrace.			
6/14/21 21:59	21BA004750	Missing Person	N Main St
missing person barre city			
6/14/21 20:22	21BA004749	Juvenile Problem	Smith St
juvenile problem smith st			
6/14/21 19:34	21BA004748	Traffic Stop	Rt 62
traffic stop RT 62			
6/14/21 18:30	21BA004747	Disturbance	Church St
disturbance church st			
6/14/21 18:28	21BA004746	Arrest Warrant - In State	Highgate Dr
arrest warrant in state Highgate Dr			
6/14/21 17:53	21BA004745	Motor Vehicle Complaint	Summer St
mv complaint summer st			
6/14/21 17:52	21BA004744	Assist - Other	Fourth St

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ORI: VT0120100			
<u>Barre City Police Department</u>			
assist other barre city			
6/14/21 17:04	21BA004743	Parking - General Violation	Averill St
parking problem averill st			
6/14/21 16:29	21BA004742	Motor Vehicle Complaint	Bassett St
mv complaint bassett st			
6/14/21 16:15	21BA004741	Assist - Other	Church St
assist other barre city			
6/14/21 13:44	21BA004740	Property Return / Disposal	Fourth St
Property return.			
6/14/21 12:42	21BA004739	Sexual Assault	Averill St
Prisoner release.			
6/14/21 12:24	21BA004738	Prisoner - Lodging/Releasing	Fourth St
Prisoner release.			
6/14/21 10:37	21BA004737	Drugs - Possession	North Main St
Assist to Quality Inn			
6/14/21 8:41	21BA004736	Assist - Other	South Main St
Assist to Quality Inn			
6/14/21 4:59	21BA004735	Directed Patrol - Motor Vehicle	Washington St
Directed patrol on Washington St.			
6/13/21 23:42	21BA004734	Assist - Agency	S Main Street
Complaint of a possible intoxicated driver on South Main Street.			
6/13/21 22:44	21BA004733	Assist - Other	Fisher Road
Welfare Check			
6/13/21 22:44	21BA004732	Welfare Check	Beckley St
Complaint of a possible intoxicated driver on South Main Street.			
6/13/21 22:22	21BA004731	Drugs - Suspicious	S Main St
Complaint of a possible intoxicated driver on South Main Street.			
6/13/21 22:15	21BA004730	Trespass	N Main St
Mental Health Issue			
6/13/21 20:33	21BA004729	Mental Health Issue	S Main St
Prisoner			
6/13/21 20:16	21BA004728	Prisoner	Fourth St
Domestic Disturbance			
6/13/21 19:31	21BA004727	Domestic Disturbance	Washington St
Threats/Harassment			
6/13/21 18:12	21BA004726	Threats/Harassment	S Main St
Assist - Agency			
6/13/21 18:01	21BA004725	Assist - Agency	S Main Street
Disorderly Conduct			
6/13/21 17:31	21BA004724	Disorderly Conduct	Beverage Baron
Disturbance on North Main Street			

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ORI: VT0120100 <u>Barre City Police Department</u>			
6/13/21 17:31	21BA004723	Assist - Other	N Main St
citizen assist Fourth Street			
6/13/21 17:24	21BA004722	Threats/Harassment	Elm Street
6/13/21 16:57	21BA004721	Disorderly Conduct	S Main Street
Disorderly Conduct on South Main Street.			
6/13/21 16:46	21BA004720	Prisoner	Fourth St
6/13/21 16:35	21BA004719	Prisoner - Lodging/Releasing	Fourth Street
Intake of male prisoner for VSP			
6/13/21 16:34	21BA004718	Suspicious Person	Blackwell Street
Public assist on Blackwell St.			
6/13/21 16:06	21BA004717	Larceny - Other	N Seminary Street
Report of a theft on N. Seminary St.			
6/13/21 15:43	21BA004716	Property - Found	Blackwell St
Found property on Blackwell St.			
6/13/21 15:30	21BA004715	Disorderly Conduct	First St
Report of a fight on First St.			
6/13/21 14:44	21BA004714	DLS	Airport Rd
Traffic stop for a speeding violation on Prospect Street leads to arrest of Joseph Morris , of Montpelier, for operating with a criminally suspended license			
6/13/21 13:34	21BA004713	Assist - Public	Fecteau Circle
Public assist on Fecteau Circle.			
6/13/21 12:54	21BA004712	TRO/FRO Service	Thurston Place
TRO service on Thurston Pl.			
6/13/21 12:29	21BA004711	Animal Problem	Highgate Drive
Bear problem on Highgate Drive.			
6/13/21 12:25	21BA004710	Vandalism	Chatot St
Vandalism in Green Acres.			
6/13/21 12:20	21BA004709	Traffic Stop	Prospect St / Berlin St
Traffic stop on Prospect St.			
6/13/21 12:14	21BA004708	Traffic Stop	Prospect St / Airport Rd
Traffic stop on Prospect St.			
6/13/21 11:46	21BA004707	Animals - Cruelty to	Chatot St
Repot of a residence at Green Acres neglecting their dog			
6/13/21 10:56	21BA004706	Disturbance	Delmont Ave
Disturbance on Delmont Ave.			
6/13/21 9:25	21BA004705	Assist - Public	Fourth St
Assisted citizen over the phone with custodial issues			
6/13/21 7:35	21BA004704	Assault - Simple	Gallow Ave
A woman called with questions about filing a police report.			

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ORI: VT0120100 Barre City Police Department			
6/13/21 7:04	21BA004703	Mental Health Issue	Pearl St Ext
C. W. wanted to speak with an officer.			
6/13/21 6:16	21BA004702	Assist - Public	Fairview St
An Officer spoke with a resident about how to apply for a restraining order.			
6/12/21 23:59	21BA004700	Traffic Stop	Us Route 302
6/12/21 23:41	21BA004699	Suspicious Vehicle	Parkside Ter
Suspicious Vehicle on Parkside Terrace			
6/12/21 23:37	21BA004698	Suspicious Event	S Main St
Mental Health Issue on South Main Street			
6/12/21 23:20	21BA004697	Traffic Stop	Maple Ave
Traffic Stop on Maple Avenue for Speeding.			
6/12/21 22:57	21BA004696	Welfare Check	Newton St
Welfare check Newton Street.			
6/12/21 22:53	21BA004695	Traffic Stop	N Main St
Traffic stop on N. Main St.			
6/12/21 22:33	21BA004694	Assist - Other	Fourth St
Information regarding missing person received on Fourth Street			
6/12/21 22:21	21BA004693	Traffic Stop	S Main St / Cumberland Farms
Traffic stop on S. Main St near Cumberland Farms			
6/12/21 22:09	21BA004692	Assist - Other	Brook St
Juvenile Problem on Brook Street.			
6/12/21 21:09	21BA004691	Noise	Washington St
Noise Complaint On Washington Street			
6/12/21 20:53	21BA004690	Traffic Stop	N Main St
Traffic stop on N. Main St for defective equipment			
6/12/21 20:46	21BA004689	Traffic Stop	Summer St
Traffic Stop for Starting Parked Vehicles on North Main Street.			
6/12/21 20:20	21BA004688	Suspicious Event	Gallow Ave
6/12/21 19:55	21BA004687	Domestic Disturbance	South Main Street
6/12/21 19:31	21BA004686	Traffic Stop	S Barre Rd / Lowery Auto
Traffic stop on S. Main St.			
6/12/21 19:15	21BA004685	Traffic Stop	South Barre Road
Traffic stop on N. Main St. for expired inspection.			
6/12/21 18:51	21BA004684	Traffic Stop	S Barre Rd / Bridge St
Traffic stop for expired inspection sticker			
6/12/21 18:00	21BA004701	Directed Patrol - Motor Vehicle	Fourth St.
An Officer conducted a directed patrol under the Vermont State Highwa Safety Office grant			
6/12/21 16:23	21BA004683	Mental Health Issue	South Main St

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ORI: VT0120100		<u>Barre City Police Department</u>	
Mental health issues S. Main St.			
6/12/21 15:56	21BA004682	911 Hangup	Skyline Drive
911 hang up highgate drive			
6/12/21 15:38	21BA004681	Suspicious Person	Blackwell St Bridge
suspicious person blackwell st			
6/12/21 15:08	21BA004680	Assist - Public	Brook St
public assist brook st			
6/12/21 14:42	21BA004679	Disorderly Conduct	Seminary St / Brook St
Dc seminary st			
6/12/21 14:12	21BA004678	Drugs - Intel received	Fourth St
drug intel barre city			
6/12/21 12:45	21BA004677	Alarm - Security	Parkside Ter
alarm parkside terrace			
6/12/21 12:05	21BA004676	Disturbance	N Main Street
disturbance n main st			
6/12/21 11:52	21BA004675	Traffic Stop	Maple Ave
traffic stop maple ave			
6/12/21 11:29	21BA004674	Directed Patrol - Motor Vehicle	Maple Ave / Seminary St
directed patrol maple ave			
6/12/21 11:08	21BA004673	Assist - Public	N Seminary St
public assist seminary st			
6/12/21 10:25	21BA004672	Assault - Simple	Fourth St
6/12/21 10:14	21BA004671	Parking - General Violation	Windsor Ter
parking problem windsor terrace			
6/12/21 9:40	21BA004670	Directed Patrol - Motor Vehicle	N Main St / Merchant St
directed patrol n main st			
6/12/21 9:12	21BA004669	Suspicious Event	N Main St
suspicious event n main st			
6/12/21 9:08	21BA004668	Traffic Stop	Merchants Row
traffic stop merchants row			
6/12/21 8:53	21BA004667	Directed Patrol - Motor Vehicle	S Main St
directed patrol s main st			
6/12/21 8:42	21BA004666	Welfare Check	Maple Ave
welfare check barre city			
6/12/21 7:56	21BA004665	Training-In-Service	Fourth Sreet
6/12/21 5:57	21BA004664	Directed Patrol - Motor Vehicle	West Patterson Street
An Officer conducted a directed patrol of West Patterson St.			
6/12/21 5:02	21BA004663	Directed Patrol - Motor Vehicle	Washington St / Hill St

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ORI: VT0120100 Barre City Police Department			
An Officer conducted a directed patrol of Washington St. in response to speeding complaints.			
6/12/21 4:45	21BA004662	Alarm - Security	North Main St / Brook St
An Officer investigated a car alarm on N. Main St.			
6/12/21 4:07	21BA004661	Assist - Agency	Fisher Road
An Officer provided a courtesy ride.			
6/12/21 2:45	21BA004660	Suspicious Vehicle	Green St
Suspicious vehicle parked on Green St.			
6/11/21 23:18	21BA004659	Suspicious Event	N Main St
Suspicious Event on North Main Street			
6/11/21 22:55	21BA004658	Directed Patrol - Other	Washington Street
Directed Patrol on Washington Street.			
6/11/21 19:38	21BA004657	Custodial Interference	Tremont St
Civil Custodial Issue on Tremont Street			
6/11/21 18:33	21BA004656	TRO/FRO Service	S Main St
TRO service on Highgate Drive.			
6/11/21 17:22	21BA004655	Animal Problem	Playground 2000
Animal Problem on Parkside Terrace.			
6/11/21 16:47	21BA004654	Suspicious Event	N Main St
Vandalism at the Court House in Barre City.			
6/11/21 15:53	21BA004653	Traffic Stop	Seminary St / N Main St
traffic stop n main st			
6/11/21 15:35	21BA004652	Parking - General Violation	Mt Vernon Pl
parking problem mt vernon place			
6/11/21 14:28	21BA004651	Assist - Public	Fourth St
public assist barre city			
6/11/21 13:33	21BA004650	Parking - General Violation	Mt Vernon Pl
parking problem mt vernon place			
6/11/21 13:28	21BA004649	Animal Problem	Westwood Pkwy
animal problem westwood parkway			
6/11/21 12:36	21BA004648	Assist - Agency	N Seminary St
agency assist seminary st			
6/11/21 12:14	21BA004647	Motor Vehicle Complaint	North Main St
Motor vehicle complaint on North Main St.			
6/11/21 10:53	21BA004646	Mental Health Issue	Church St / Washington St
MH issue washington st			
6/11/21 10:52	21BA004645	Assault - Simple	N Seminary St
Assault report on N. Seminary St.			
6/11/21 10:30	21BA004644	Motor Vehicle Complaint	W Patterson St
A concenred citizen reported a vehicle travelling the wrong way on a one way street.			
6/11/21 10:25	21BA004643	Assist - Agency	S Main St
agency assist s main st			

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ORI: VT0120100 Barre City Police Department			
6/11/21 10:06	21BA004642	Motor Vehicle Complaint	North Main St / Berlin St
mv complaint barre city			
6/11/21 10:01	21BA004641	Welfare Check	Orange St
Agency assist on Orange St.			
6/11/21 9:56	21BA004640	Disturbance	N Main St
disturbance n main st			
6/11/21 9:16	21BA004639	Threats/Harassment	Fourth St
threats/harassment barre city			
6/11/21 8:26	21BA004638	Alarm - Security	N Main St
alarm n main st			
6/11/21 7:35	21BA004637	Drugs - Intel received	Fourth St
drug intel barre city			
6/11/21 6:22	21BA004636	Traffic Stop	VT Rt 62 / Berlin St
6/11/21 6:12	21BA004635	Suspicious Person	Railroad St
An Officer responded to a suspicious complaint on Railroad St.			
6/11/21 2:09	21BA004634	Suspicious Person	Laurel St
An Officer responded to a suspicious complaint on Laurel St.			
6/10/21 23:35	21BA004633	Disturbance	North Main St
6/10/21 23:17	21BA004632	Noise	Franklin St
Loud noise on Franklin Street.			
6/10/21 22:53	21BA004631	Accident - LSA	Maple Ave / Seminary St
Report of single car accident on Maple Ave.			
6/10/21 21:58	21BA004630	Fireworks	Seminary St / Laurel St
Report fireworks in the area of Seminary and Laurel Street.			
6/10/21 21:49	21BA004629	Disturbance	N Main St / Washington St
Report of a male disturbing the construction workers on N Main Street.			
6/10/21 21:02	21BA004628	Assist - Agency	Valley View Circle
Agency assist Barre Town			
6/10/21 20:41	21BA004627	Accident - LSA	Highgate Apts
Reported Leaving the Scene of Accident on Skyline Drive.			
6/10/21 19:19	21BA004626	Traffic Stop	Summer St
Traffic stop for speeding on Maple Ave.			
6/10/21 19:10	21BA004625	Directed Patrol - Motor Vehicle	Maple Ave
Directed patrol- Traffic enforcement on Maple Ave.			
6/10/21 18:24	21BA004624	Trespass	N Main St / Beach
Trespassing on N Main Street.			
6/10/21 18:13	21BA004623	Disturbance	Blackwell St / under pass
Disturbance reported on Blackwell Street.			
6/10/21 15:18	21BA004622	Suspicious Person	Seminary St / Summer St

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ORI: VT0120100		<u>Barre City Police Department</u>	
suspicious person summer st			
6/10/21 14:46	21BA004621	<i>Suspicious Event</i>	Washington St / Perry St
suspicious event washington st			
6/10/21 14:24	21BA004620	<i>Drugs - Intel received</i>	Fourth St
drug intel barre city			
6/10/21 12:43	21BA004619	<i>Assist - Public</i>	Fourth St
public assist barre city			
6/10/21 12:24	21BA004618	<i>Disturbance</i>	North Main St
disturbance n main st			
6/10/21 12:01	21BA004617	<i>Assist - Public</i>	Fourth St
public assist barre city			
6/10/21 10:08	21BA004616	<i>Welfare Check</i>	Maple Ave
welfare check barre city			
6/10/21 10:03	21BA004615	<i>Disturbance</i>	North Main St
disturbance n main st			
6/10/21 8:45	21BA004614	<i>TRO/FRO Service</i>	East St
TRO service east street			
6/10/21 7:09	21BA004613	<i>Parking - General Violation</i>	Essex St
An Officer responded to a parking complaint on Essex St.			
6/10/21 7:01	21BA004612	<i>Traffic Stop</i>	Hill St / Elmwood Cemetery
Traffic stop on Washington St. for a speeding violation.			
6/10/21 6:42	21BA004611	<i>Traffic Stop</i>	Hill St / Elmwood Cemetery
Traffic stop for speeding on Hill Street.			
6/10/21 6:39	21BA004610	<i>Traffic Stop</i>	Washington St / Elmwood Cemetery
Traffic stop on Washington St.			
6/10/21 6:30	21BA004609	<i>Traffic Stop</i>	Washington St / Champlain Farms
Traffic stop on Washington St.			
6/10/21 6:24	21BA004608	<i>Traffic Stop</i>	Elmwood Cemetery
Traffic stop for speeding on Hill Street.			
6/10/21 6:21	21BA004607	<i>Traffic Stop</i>	washington st / poulin auto
6/10/21 6:05	21BA004606	<i>Directed Patrol - Motor Vehicle</i>	Washington St
Directed patrol of Washington St. in response to speeding complaints.			
6/10/21 5:57	21BA004605	<i>Directed Patrol - Motor Vehicle</i>	Hill Street
Traffic enforcement on Hill Street.			
6/10/21 5:27	21BA004604	<i>Assist - Agency</i>	Hill St / Barre City Line
Assisted Barre Town PD with traffic stop with suspected possible drug activity.			
6/10/21 4:10	21BA004603	<i>Supervisory Duties - Case Review</i>	Fourth St
Supervisory Duties- Case Review			
6/10/21 2:30	21BA004602	<i>Suspicious Event</i>	N Main St

Media Log Report

Rev.01/26/12

From: 06/10/2021 0:52

To: 06/17/2021 0:34

Date/Time	Incident #	Call Type	Location
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ORI: VT0120100

Barre City Police Department

6/10/21 2:07	21BA004601	<i>Intoxication</i>	N Main St
Officers responded a residence on N. Main St. for the report of an intoxicated person.			
6/10/21 1:26	21BA004600	<i>Noise</i>	Highgate Dr
Officers responded to a noise complaint at the Highgate apartment complex.			
6/10/21 0:52	21BA004599	<i>Disturbance</i>	Averill St
disturbance averill street			

Total Incidents 227