



Ad-Hoc Reappraisal Committee Meeting - February 28th @ 5:30 PM in the Champlain Room, 3rd Floor City Hall and ****REMOTE**** 2/28/2023

AD-HOC REAPPRAISAL COMMITTEE

Tuesday, February 28, 2023

Champlain Conference Room and via Zoom

DRAFT MINUTES

Members Present: James Unsworth, Chris Haessly, Alan Bjerke, Kevin Stapleton, Jonathan Chapple-Sokol, David Edwards, Dan Kirk, Joan Shannon

Staff Present: John Vickery (City Assessor), Joseph Dempsey (City Attorney's Office Staff)

Others in Attendance: (None)

Meeting called to order at 5:35 PM.

1.0 Agenda

1.01 Motion to Adopt Draft Agenda

Motion by Chris Haessly, Seconded by Alan Bjerke.

Final Resolution: Motion Passes.

Yes: Unanimous.

2.0 Adopt Minutes from 12/01/2022

2.01 Motion to Adopt Minutes from 12/01/2022

Motion to Adopt Minutes from 12/01/2022.

Motion by Chris Haessly, Seconded by Kevin Stapleton.

Final Resolution: Motion Passes.

Yes: Unanimous.

3.01 Public Comment

No members of the public present.

4.0 Committee Discussion

4.01 Legislature's Proposal for the State to Cover Appraisals



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James Unsworth: The Ways and Means Committee has been taking testimony and having hearings regarding this. Half the municipalities in the state are going to need a reappraisal.

Alan Bjerke: is there a bill number?

David Edwards: So is the issue that all the municipalities are having these issues and it isn't Burlington in particular?

John Vickery: It is a lagging study so we will be in this position in a few years, not immediately. Chittenden County is appreciating at a higher rate than much of the state.

David Edwards: Chittenden County has a lot of the state's parcels.

James Unsworth: To get Joan up to speed, the legislature is working on this issue and seeing if the state will take over this burden.

Joan Shannon: Will this not be handled by the CLA?

John Vickery: I don't know about that. There are so many towns that need to do reappraisals that there are simply not enough professionals to do it.

David Edwards: I don't know if the CLA is state-wide.

John Vickery: They equalize every town when they do education funding.

David Edwards: When they equalized education, they must have started comparing towns.

Joan Shannon: They weren't saying that Stowe is worth more than Stannard, but rather the property taxes are higher so they have more revenue for education versus a less valued town. It is a complicated equation, but there is a method to it. Some towns are in different phases of reappraisal too which feeds into how towns are equalized.

Jonathan Chapple-Sokol: CLA helps to balance between towns for education, but at 85% the town has to reappraise.

John Vickery: I think towns should be making efforts to reappraise. I hope they improve this system.

James Unsworth: I think the state will take a few years to figure out this issue.

Alan Bjerke: does it make sense to reference this in our report?

James Unsworth: Yes, there are large implications from this. What I propose is that a cover letter to this report states that the testimony and discussion was done before this proposal.

Joan Shannon: We can identify problems and pass along our recommendations.

James Unsworth: The City Council could send the recommendations to the Ways and Means Committee as they are working on this same issue.

Alan Bjerke: It would be appropriate for the City's lobbyist to get on the Ways and Means Committee to let them know our recommendations.

Jonathan Chapple-Sokol: Would it be too forward for us to make a public comment about local control? It seems like it would be harder to do reappraisals if Montpelier were part of the discussion.

James Unsworth: Right now, local folks do the appeals, etc. so do we want Montpelier to be in charge?



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Alan Bjerke: The legislation will likely change and does not even have a bill number.

James Unsworth: Yes, this should be in the cover letter to the report that we are apprehensive about letting reappraisals leave local control.

Joan Shannon: We are apprehensive about giving up local control? We are?

David Edwards: We would not have to abandon local assessors, and could we have a less local appraisal but keep control through our own assessor?

Kevin Stapleton: We should mention how these issues are being discussed in Montpelier. We are making assumption about how this legislation could end up.

Alan Bjerke: The second level of appeal is already at the state level.

Joan Shannon: The appeals process was such a burden and Alan Bjerke did a great job by stepping up to take on that task. Many of the people were volunteers and put in the time. Locals know the appellants and might be sympathetic or not because it is a small town. The appeals process wasn't bad because it was in Montpelier, it was bad because it was poorly done.

John Vickery: The major model around the entire US is county-wide or market district. Vermont is quite unique. Most assessors in VT don't want total state control or even county-wide. The process could be better and more professional if done at a larger area.

Kevin Stapleton: Local control issues seem to be on the forefront.

James Unsworth: Do we agree that there are too many moving pieces to make accurate predictions on the legislature at this time, but hopefully our recommendations can go to Montpelier and see how they could be incorporated.

4.02 Finalizing the Committee's Report to the City Council

James Unsworth: Any issues with the final draft that we've prepared beyond grammar?

Alan Bjerke: The report should have an appendix with the educational materials we put out previously.

Shannon: People might feel unheard if we quote too many people but not them. We should probably generalize more so it is less personal, including our own thoughts on the issues.

Bjerke: I think we could just cut it out, but I do think the direct quotes are helpful.

Jonathan Chapple-Sokol: I agree, I think the direct quotes are helpful. We could say that these are the kind of the things that we heard.

Kevin Stapleton: De-individualizing the quotes would be great, but keep the general quote. Not to take anything away from your report, James.

James Unsworth: So we'll de-individualize it, do we agree?

Alan Bjerke: There are some baseless accusations.

Joan Shannon: I don't think we should include baseless accusations or things that are just totally non-fact based. It might be helpful to consolidate all of the recommendations at the end. The structure might need to be made consistent since we have multiple authors.



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James Unsworth: Anyone else can adjust anything in the report if they care to. Do we want to agree on a format now?

Alan Bjerke: My two sections are consistent and the third is not. I don't see a fourth section here.

James Unsworth: Alan, should the two of us work on this one last time to create a solid final draft for everyone to review.

Jonathan Chapple-Sokol: I have a few comments. Including a full, comprehensive timeline of the appraisal process and appeal process before everything begins would be a good idea. The informal appeal is done without a timeline.

Alan Bjerke: I think it was because of COVID and we did not have the ability to have informals.

Jonathan Chapple-Sokol: I think informals should be a required portion of this appeals timeline.

John Vickery: We had to forego it with the time crunch in this last appraisal.

Jonathan Chapple-Sokol: With that step, I think our process would have been much better.

James Unsworth: Yes, it has been there in the past. Do you want to put together a paragraph to include?

Alan Bjerke: We followed the statute guidelines.

Jonathan Chapple-Sokol: Yes, but I think the timeline was flawed, unfortunately.

James Unsworth: The informals would allow owners to get the numbers explained before the formal appeal process.

Joan Shannon: The assessor's office can handle the day to day, so who is doing the informals?

John Vickery: Tyler did in the past. In a good year, the process works pretty well and most people are left satisfied. We used our deputy assessor and assistant assessor in the informals too.

Joan Shannon: So much time and money went to Tyler and they made large errors and were not satisfactory. So much seemed to be ignored by the contractor. The hearing officers were unprepared and had not read anything in advance. Then the superior of the hearing officer would reject the appeal despite not hearing the appeal in the first place.

Jonathan Chapple-Sokol: The contractor did the Board of Assessors appeals and it was a failure. Informals would have remedied many of them.

Joan Shannon: We put lots of effort and money into the process and the contractor was unprepared and insufficient.

Jonathan Chapple-Sokol: The informals didn't really happen and the BOA appeals didn't really happen. The state is not prepared to hear such a volume of appeals from the local level and everything got tied up.

Joan Shannon: The informals should be with the contractor and not volunteers.

John Vickery: I gave Tyler warnings about the volume and they said they were prepared, but evidently were not. The contract has all the details in it and perhaps the next contract should be even more detailed in what we want.

James Unsworth: Part of our recommendation is to keep assessment in-house and not rely on contractors. There should be an informal process with locals before we get to the appeals.

Kevin Stapleton: For John, do you agree that Tyler was derelict in their duties?

John Vickery: I think they have competent people but were not ready for what we needed. They did not have enough





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people in the call center, everything was virtual because of COVID.

Kevin Stapleton: So should we change or improve the RFP process to try to improve things?

John Vickery: The RFP could be better and require more on-site staffing, that kind of thing. The pandemic really messed things up for Tyler.

Joan Shannon: Some hearing officers were better than others, but they did listen to people's complaints. Those officers then have their recommendations overruled by a supervisor. I think the hearing officer should have the final say and the City could be the 'supervisor.'

Chris Haessly: Should we set a time so we know we want to get together?

Joan Shannon: Maybe we should talk more about the informals and the hearing process overall.

James Unsworth: We will continue to work on this draft.

Jonathan Chapple-Sokol: This may sound odd, but if there is another pandemic or emergency I think we ask the state for a delay so we're not doing a reappraisal in an emergency.

David Edwards: We would also need proper language in our contract to make sure that we aren't on the hook for the cost if there is an emergency.

John Vickery: There were some site visits during a normal reappraisal, but obviously none during the pandemic.

Alan Bjerke: We need to be planning way ahead to get the RFP and contract done way ahead of time with a lot of foresight.

Joan Shannon: Another complaint was about the frequency and this past year was actually the largest increase in property values.

James Unsworth: So I think we would have to look into how we could ask the state for a delay in an emergency. Who would be in charge of allowing that?

Alan Bjerke: Don't you get penalized for having a particularly out-of-whack CLA?

John Vickery: I've never heard of that before myself.

5.0 Other Committee Business

Chris Haessly: I would suggest we meet 2 weeks from tonight to get back together to review the final draft.

James Unsworth: If people know their calendars, could we set a time in 3 weeks? 5:30 on the 23rd? Let's plan for then.

6.0 Adjournment

Motion to Adjourn by Chris Haessly, Seconded by Jonathan Chapple-Sokol.

Yes: Unanimous.

Committee Adjourned at 6:33 PM.



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