

Town of Belgrade  
Attn: Ms. Lorna Dee Nichols  
990 Augusta Road  
Belgrade, ME 04917

RE: Tax Assessor's Agent Position

Dear Ms. Nichols,

Please find enclosed a cost estimate for the RFP for Assessor's Agent found on MMA's website. Total cost of the proposal is **\$23,400**.

Our team consists of 4 Certified Maine Assessors (main staff Biographies below), a Residential/Commercial Property Lister and a GIS/Mapping Coordinator with a combined 25+ years' experience. We look forward to not only handling the assessing needs of your town, for the next year, but establish a well-run department and an equitable valuation of Belgrade for years to come. Thank you again for your consideration in this matter and we look forward to discussing this further with you.

**Current Client List:**

- Town of Corinth
- Town of New Limerick
- Contracted Revaluation firm for Town of Holden & Town of Hampden
- Completed Revaluations for Town of Milo (2021) and Town of Corinth (2023)

Respectfully,



Josh Berry, CMA - CEO - LPI  
President

## PROPOSAL

TO: Town of Belgrade

FROM: RCS Assessment Services, INC

RE: Tax Assessor's Agent

DATE: December 1<sup>st</sup>, 2023

Services provided by RCS Assessment Services:

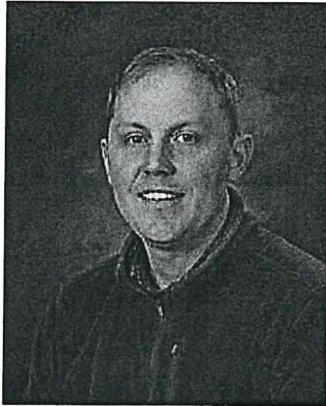
- All administrative work for the assessing department as outlined in the RFP. This will include, but not limited to, preparation of town valuations, appraisal and assessment record keeping, assisting in printing of tax bills, updating tax maps, performing appropriate field work, preparation of reports necessary to meet requirements of Maine State Law. For example, annual Municipal Valuation Return, Sales Analysis Return, annual Tree Growth report and assisting the public with real and personal property valuations.
- Provide all other assessing functions that cannot be performed by Town Staff.
- Be available a minimum of 2 days per month to hold office hours and meet with the public regarding property valuations or other concerns. An additional 12 undesignated days for field work, site visits and following up on building permits. (Some of these remote, depending on time of year)
- Provide General Liability Insurance, Professional Liability Insurance (Errors and Omissions Insurance), Vehicle Insurance and Workers Compensation Insurance for RCS employees.

**Cost Estimate for Services: \$23,400**

**6 Month Work Plan**

<p style="text-align: center;"><b><u>1<sup>st</sup> Month</u></b></p> <ul style="list-style-type: none"> <li>• Meet with town staff to determine immediate assessing needs</li> <li>• Process Deeds/Update Transfers</li> <li>• Review Real Estate Assessments</li> <li>• Review previous years Personal Property and BETE/BETR info</li> </ul>	<p style="text-align: center;"><b><u>2<sup>nd</sup> Month</u></b></p> <ul style="list-style-type: none"> <li>• Run Sales Ratios</li> <li>• Review Building Permits and perform necessary field work</li> <li>• Review Commercial Accounts</li> <li>• Send out Personal Property Notices</li> </ul>
<p style="text-align: center;"><b><u>3<sup>rd</sup> Month</u></b></p> <ul style="list-style-type: none"> <li>• Bring Transfers and Deeds up to date</li> <li>• Run valuation reports</li> <li>• Personal Property Data Entry</li> <li>• Update Mobile Home info</li> <li>• Adjust Commercial Cost Files</li> </ul>	<p style="text-align: center;"><b><u>4<sup>th</sup> Month</u></b></p> <ul style="list-style-type: none"> <li>• Make Land Schedule and Real Estate cost adjustments</li> <li>• Finalize Commercial Accounts</li> <li>• Run Sales Ratio Studies</li> <li>• Finalize Personal Property</li> </ul>
<p style="text-align: center;"><b><u>5<sup>th</sup> Month</u></b></p> <ul style="list-style-type: none"> <li>• Review Real Estate/Personal Property Assessments with Tax payers.</li> <li>• Assist Business owners with BETR applications</li> <li>• Process Deeds/Update Transfers</li> </ul>	<p style="text-align: center;"><b><u>6<sup>th</sup> to 8<sup>th</sup> Month</u></b></p> <ul style="list-style-type: none"> <li>• Prepare to run Commitment</li> <li>• Prepare to fill out MVR</li> <li>• Prepare information for annual State Audit</li> <li>• Prepare Sales Analysis Return</li> <li>• Finalize all other paper work with State of Maine/Complete LD1</li> </ul>

## Staff Biographies



Josh Berry  
CMA/CEO/LPI

- Owner RCS Assessment Services, INC
- 2023- Present: Town Manager, Town of Hermon
- 2016- 2023: Assessor and Code Enforcement Officer for Town of Hermon
- Completed an in-house revaluation for the Town of Hermon in fall of 2018
- 2008-2016: Worked in the construction/carpentry industry



Lil Smith  
CMA

- 2014 - Present: Assistant Assessor/ Appraiser for Town of Bradford, Old Town and RCS Assessment Services
- 2011 to 2015: Assistant Assessor/ Appraiser for Towns of Veazie, Orono and Old Town
- 1978 to 2006: Appraiser/ Appraisal Tech for City of Bangor
- Extensive knowledge of TRIO, BETE and BETR programs. Obtained CMA in 1996.

**Professional Work  
References**

- 1.) **Stephen Fields**  
Town Manager  
Corinth  
207-285-3271
  
- 2.) **Judy Nightingale**  
Town Manager  
New Limerick  
207-532-3303
  
- 3.) **Ben Birch**  
Former Supervisor  
Multiple Towns  
207-571-4905

**Attachment C**

**REQUEST FOR PROPOSAL TAX  
ASSESSOR SERVICES**

Assessor's Name: Josh Berry

Address: 45 Hillcrest  
Drive, Hermon,  
ME 04401

Telephone: 207-852-7121

I have read the 'Request for Proposals for Tax Assessor Services' specifications, and I submit the following bid prices:

**Rate for Services:**

A. Number of days per contract year to perform services: 36

B. My per-day rate to perform these services: \$650

C. Total annual cost to perform services: \$23,400

D. My per-day rate for any additional days requested by the town over the amount listed above in item A. \$650

**Optional Services:**

A. Total cost to perform town-wide revaluation, if required: TBD

**Other Expenses:**

The Town of Belgrade will provide office space, desktop computer, internet/network connection, printer/copier/fax, desk, phone, and other standard office supplies, such as paper and pens, for the contract assessor. Please indicate whether you will be providing the following items for yourself or if you expect the town to incur approximate dollar amounts for each. These other expenses will factor into the town's selection criteria.

<u>Item</u>	<u>I will provide</u>	<u>Town must provide</u>	<u>Estimated cost to town</u>
Laptop	<u>X</u>	<u>      </u>	<u>      </u>
Mobile Phone	<u>X</u>	<u>      </u>	<u>      </u>

Training/Conference	<u>  X  </u>	_____	_____
IAAO Dues	<u>  X  </u>	_____	_____
MAAO Dues	<u>  X  </u>	_____	_____
Other	_____	_____	_____
Other	_____	_____	_____
Other	_____	_____	_____
<b>TOTAL EST. COST TO TOWN</b>			<u>  23,400  </u>

If I am selected as the winning bidder, I can provide assessing services beginning on January 1, 2024. I will provide written proof of liability and worker's compensation insurance (if applicable) to the town before the start of work.

Date:   Nov 29, 2023  

Signed:                     *Josh Berry*                    

Printed name:           Josh Berry



# State of Maine

Having successfully demonstrated proficiency in the field of Property Tax Administration

This is to certify that

*Josh Berry*

Is hereby issued this Certificate of Eligibility

as a

*Certified Maine Assessor*

As evidence of qualification to perform the assessment function in any assessing Jurisdiction  
in the State of Maine.

*[Signature]*  
Chief of Training and Certification, Maine Revenue Services

No. 921

*[Signature]*  
Director, Property Tax Division, Maine Revenue Services

Date: 08/05/2016