

Business Item Description:	Attachments:
Subject: Hiring of a Contract Assessor	1. Resolution 24-01-1084 2. Appraisal Company of Alaska RFP 3. Appraisal Company of Alaska Contract
Originator: Manager	
Originating Department: Administration	
Date Submitted: 01/18/24	

Full Title/Motion:
Motion: Adopt Resolution 24-01-1084

Administrative Recommendation:

Fiscal Impact:			
Expenditure Required	Amount Budgeted	Appropriation Required	Projected Impact to Future Operating Budgets
\$ 50,000	\$ 0	\$ 0	N/A

Comprehensive Plan Consistency Review:	
Comp Plan Goals/Objectives:	Consistent: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No

Summary Statement:

Referral:	
Referred to:	Referral Date:
Recommendation:	Meeting Date:

Assembly Action:	
Meeting Date(s): 01/23/24	Public Hearing Date(s):
	Postponed to Date:

DRAFT

HAINES BOROUGH
RESOLUTION No. 24-01-1084

A Resolution of the Haines Borough Assembly authorizing the Borough Manager to enter into a Professional Services Agreement with Appraisal Company of Alaska, LLC to provide contract Assessor Services for the Haines Borough.

WHEREAS, due to the loss of the Haines Borough Assessor, the Haines Borough needs a contract Assessor to assist the Borough with consulting and administration of the ad valorem property tax assessments for the Haines Borough in 2024 and 2025; and

WHEREAS, Appraisal Company of Alaska, LLC has assessment contracts with several municipalities similar to the Haines Borough and

WHEREAS, Company President Michael Renfro is familiar with the Haines Borough; and

WHEREAS, the services Appraisal Company of Alaska, LLC proposes to provide to the Haines Borough are:

1. **Assessments**- Produce the assessment roll for the next two years, including administration and attendance at the Board of Equalization;
2. **Documentation**- Documentation of existing approach to assessment in the Haines Borough and communicate the assessment approach publicly;
3. **System Review and Design**- Review current assessment practices and help develop a transition plan;
4. **Technology Utilization** - Identify and/or implement the technology aspects of an assessment system;
5. **Training** - Provide training to Borough staff; and

WHEREAS, time is of the essence since the appraisal date is January 1, 2024; and

WHEREAS, Appraisal Company of Alaska, LLC proposes to provide services to the Haines Borough at a rate not to exceed \$50,000 for 2024 and \$100,000 for 2025; and

WHEREAS, Appraisal Company of Alaska, LLC shall be allowed to use a Borough vehicle for work as specifically authorized by this resolution per HBC 14.12.0IO(B) Personal Property or equipment; and

WHEREAS, the funding for these services will be achieved via line item transfer within the Lands Department,

NOW, THEREFORE, BE IT RESOLVED that the Haines Borough Assembly authorizes the borough manager to enter into a professional services agreement with Appraisal Company of Alaska, LLC to provide contract Assessor Services for the Haines Borough.

Adopted by a duly-constituted quorum of the Haines Borough Assembly on this 23rd day of January, 2024.

**A PROPOSAL FOR
Haines Borough, Alaska
PROFESSIONAL ASSESSMENT SERVICES**

January 12, 2024

**PREPARED BY:
MICHAEL C. RENFRO, PRESIDENT**

**APPRAISAL COMPANY OF ALASKA, LLC
405 W. 27th Ave.
ANCHORAGE, ALASKA 99503
(907) 562-2424**

Fax
(907) 563-1368

Telephone
(907) 562-2424

Appraisal Company of Alaska LLC

405 W. 27th Ave.
ANCHORAGE, ALASKA 99503
office@appraisalalaska.com
EIN#26-2071908

January 12, 2024

Tom Morphet
Haines Borough
103 Third Ave. S.
Po Box 1209
Haines, Alaska 99872

Re: RFP for Contract Assessment Services
Years 2024, 2025, 2026

Dear Mr. Morphet:

As you have requested, the Appraisal Company of Alaska, LLC submits the following proposal to the Haines Borough for Professional Assessment and CAMA Services.

The Appraisal Company of Alaska, LLC is fully prepared to meet the project objectives.

This proposal is presented by:

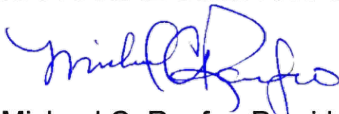
Michael C. Renfro, President
Appraisal Company of Alaska, LLC
405 W. 27th Ave.
Anchorage, Alaska 99503

Telephone: (907) 562-2424
Fax: (907) 563-1368
email: mrenfro@appraisalalaska.com

Thank you for the opportunity to submit our proposal. If you have any additional questions, please call me.

Sincerely,

APPRAISAL COMPANY OF ALASKA, LLC



Michael C. Renfro, President

MCR:tif

TABLE OF CONTENTS

Professional Staff.....01

Statement of Experience.....11

Valuation Method.....13

Financial Resources.....14

Relevant Work and References.....15

Cost Proposal, Assessment Reviews, CAMA Cost Proposal, Scanning of paper
cards.....21

Significant Engagements.....22



PROFESSIONAL STAFF

CONTRACT ADMINISTRATOR AND PRINCIPAL PERSONNEL

A brief narrative discussion of the Plan Administrator and principal personnel is as follows. Complete resumes are located toward the end of this section.

Michael C. Renfro: The Plan Administrator will be Michael C. Renfro, President of Appraisal Company of Alaska. He has extensive experience working in Cordova and has administered the complete assessments on ten communities and Boroughs in the State. Mike has supervised the implementation of the conversion to assessment CAMA Systems in seven communities and Boroughs throughout the state. He has assisted in writing courses for the State Assessor that have been presented at the Alaska Municipal League conferences and will be on hand to oversee the assessment process.

Adam Verrier: Adam is an assessor and an appraiser with appraisal experience throughout the State over the past twenty years. He is a licensed appraiser and has applied for his Level III Assessor Certification with the Alaska Association of Assessing Officers.

Arne Erickson: Staff assessor with extensive experience in Urban Planning and nineteen years' experience working in Cordova.

Martins Onskulis: Staff assessor with four years' experience throughout the state. He has applied for his appraisal trainee license, and is well versed in the Alaska CAMA System.

Other Staff: Appraisal Company of Alaska is a full service appraisal company. In addition to the Assessing Staff are two support personnel.

QUALIFICATIONS OF APPRAISER

MICHAEL C. RENFRO

EDUCATION:

2021 27 Hour Continuing Education Sponsored by Appraisal Institute, Chicago, IL

2021 7 Hour Uniform Standards & Professional Appraisal Practice 2021 Update

2018 7 Hour Uniform Standards & Professional Appraisal Practice 2018 Update

2015-2017 27 Hour Continuing Education Sponsored by Appraisal Institute, Chicago, IL

2013-2015 27 Hour Continuing Education Sponsored by Appraisal Institute, Chicago, IL

2011 27 Hour Continuing Education Sponsored by Appraisal Institute, Chicago, IL

2009 27 Hour Continuing Education Sponsored by Appraisal Institute, Chicago, IL

2007 27 Hour Continuing Education Sponsored by Appraisal Institute, Chicago, IL

2005 27 Hour Continuing Education Sponsored by Appraisal Institute, Chicago, IL

2003 The Road Less Traveled; Special Purpose Properties by Appraisal Institute, Girdwood, Alaska

2003 Appraisal of Non-Conforming Uses by Appraisal Institute, Girdwood, Alaska

2003 Partial Interest Valuation Dividend; Appraisal Institute, Girdwood, Alaska

2003 Subdivision Analysis; Appraisal Institute, Girdwood, Alaska

2002 Introduction to Real Estate Econometrics with a Trend Analysis Application; sponsored by Appraisal Institute of Alaska, Anchorage, Alaska

2002 IAAO Course 102 – Income Approach to Valuation; sponsored by AAAO, Anchorage, Alaska

2001 Seminar on Partial Interest Valuation – Divided; sponsored by Appraisal Institute of Alaska, Anchorage, Alaska

2001 Seminar on Partial Interest Valuation – Undivided; sponsored by Appraisal Institute of Alaska, Anchorage, Alaska

2000 Standards of Professional Practice, Part C, sponsored by Appraisal Institute of Alaska, Anchorage, Alaska

1999 On-Line Residential Design and Functional Utility, sponsored by Appraisal Institute, Chicago, IL

QUALIFICATIONS

MICHAEL C. RENFRO pg. 2

EDUCATION (Continued):

- 1997 IAAO Course 311: Residential Modeling Concepts, sponsored by the Alaska Association of Assessing Officers, Anchorage, Alaska
- 1995 Standard of Professional Practice, Course 410 & 420, sponsored by the Appraisal Institute, Anchorage, Alaska
- 1995 IAAO Course 630: Personal Property Auditing, sponsored by the Alaska Association of Assessing Officers, Anchorage, Alaska
- 1994 Valuing Property Affected by Environmental Contamination sponsored by the International Association of Assessing Officers, Seattle, Washington
- 1993 IAAO Course 301: Mass Appraisal of Residential Property, sponsored by the Alaska Association of Assessing Officers, Anchorage, Alaska
- 1993 IAAO Course 1: Fundamentals of Real Property Appraisal, sponsored by the Alaska Association of Assessing Officers, Prudhoe Bay, Alaska
- 1993 IAAO Course 4: Assessment Administration, sponsored by the Alaska Association of Assessing Officers, Anchorage, Alaska
- 1991 An Introduction to the Appraisal of Conservation Easements and Restricted Lands, sponsored by the Lincoln Land Institute, Phoenix, Arizona
- 1991 Valuation of Wetlands, sponsored by the Alaska Association of Assessing Officers, Fairbanks, Alaska
- 1991 Valuation Of Contaminated Properties and the Effect On Assessed Values, sponsored by the Alaska Association of Assessing Officers, Fairbanks, Alaska
- 1991 Standards of Professional Practice, sponsored by the Appraisal Institute, Anchorage, Alaska
- 1989 Seminar, The Appraisal of Possessory Interests for ad valorem tax purposes sponsored by the Alaska Association of Assessing Officers
- 1989 ANSCA 1991 Amendments workshop sponsored by the Alaska Association of Assessing Officers
- 1989 Seminar, Methods and Techniques Appropriate for the Development of a True Computer Assisted Mass Appraisal System for Commercial Properties and the Usefulness of a Graphic Information System.

MICHAEL C. RENFRO pg. 3

EDUCATION (Continued):

- 1987 Cash Equivalency Seminar sponsored by the American Institute of Real Estate Appraisers
- 1983 Condominium Seminar, Society of Real Estate Appraisers
- 1979 Attended Society of Real Estate Appraisers' Narrative Report Writing Seminar
- 1979 Completed Society of Real Estate Appraisers R-2 (Residential Narrative) Examination
- 1972-1974 Western State College of Colorado, Degree Bachelor of Arts in Business Administration
- 1971 Completed Course 1A, "Real Estate Appraisal" Basic Principles, Methods and Techniques, American Institute of Real Estate Appraisers, Chicago, Illinois
- 1966-1968 Drake University, Des Moines, Iowa

EXPERIENCE:

- 2019-Present Appraiser, Appraisal Company of Alaska, LLC Owner
- 1976-2019 Appraiser, Appraisal Company of Alaska, LLC Owner/Partner
- 1974-1976 Real Estate Appraiser with Gebhart and Peterson, Inc.
- 1969-1971 Staff Real Estate Appraiser with Alaska Mutual Savings Bank

PROFESSIONAL AFFILIATIONS:

Residential Real Estate Appraiser; State of Alaska Certificate No. APRR-114

Alaska Association of Assessing Officers, Alaska Certified Assessor Appraiser, Level II - Certificate No. 129

International Association of Assessing Officers

OTHER:

Past member of the Matanuska Susitna Borough Board of Equalization

Qualified as an expert witness in the State of Alaska Superior Court and the United States Federal Court

QUALIFICATIONS OF APPRAISER

ADAM B. VERRIER

EDUCATION:

- 2012-2023 Continuing Education USPAP Update Courses Alaska Chapter of the Appraisal Institute, Anchorage, Alaska
- 2011 Loss Prevention for Real Estate Appraisers – Liability Administrators Insurance, Santa Barbara, CA
- 2011 Uniform Standards of Professional Appraisal Practice Update - William King & Associates, Federal Way, WA
- 2011 Energy Efficient Heating & Hot Water – Alaska Craftsman Home Program, Anchorage, AK
- 2011 Energy Efficient Lighting & Appliances – Alaska Craftsman Home Program, Anchorage, AK
- 2011 Ventilation in Homes – Alaska Craftsman Home Program, Anchorage, AK
- 2011 Energy Efficient Doors & Windows – Alaska Craftsman Home Program, Anchorage, AK
- 2011 Building Science Basics – Alaska Craftsman Home Program, Anchorage, AK
- 2011 Air Tightness in Homes – Alaska Craftsman Home Program, Anchorage, AK
- 2011 Ice Dams – Alaska Craftsman Home Program, Anchorage, AK
- 2009 Introduction to Valuing Green Buildings - Appraisal Institute, Chicago, IL
- 2009 Valuation of Green Residential Properties – Appraisal Institute, Chicago, IL
- 2009 Eminent Domain and Condemnation - Appraisal Institute, Chicago, IL
- 2009 Uniform Standards of Professional Appraisal Practice Update - William King & Associates, Federal Way, WA
- 2007 Course 400: USPAP Update Course – Alaska Chapter of the Appraisal Institute; Anchorage, Alaska
- 2005 Course 400: USPAP Update Course – Alaska Chapter of the Appraisal Institute; Girdwood, Alaska
- 2005 Rates & Ratios: Making Sense of GIMs, OARs, and DCF – Alaska Chapter of the Appraisal Institute; Girdwood, Alaska

QUALIFICATIONS (PAGE 2)
ADAM B. VERRIER

EDUCATION
CONTINUED:

- 2005 Residential Design & Functional Utility – Appraisal Institute; Chicago, Illinois
- 2005 The Professional's Guide to the Uniform Appraisal Report – Appraisal Institute; Warwick, Rhode Island
- 2002 IAAO Course 102 – The Income Approach to Valuation; Anchorage, Alaska
- 2001 The Technical Inspection of Real Estate - The Beckman Company; Anchorage, Alaska
- 2000 IAAO Course 400 – Assessment Administration; Anchorage, Alaska
- 2000 Introduction ACCESS 2000; Anchorage, Alaska
- 2000 IAAO Workshop 151 - Standards of Practice and Professional Ethics; Durham, New Hampshire
- 2000 IAAO Workshop 155 - Depreciation Analysis; Durham, New Hampshire
- 1999 IAAO Course 300 - Fundamentals of Mass Appraisal; Anchorage, Alaska
- 1999 Real Estate Appraisal - Case Studies, University of Alaska; Anchorage, Alaska
- 1998 Real Estate Appraising, University of Alaska, Anchorage, Alaska
- 1993 B.A. Psychology, University of Wyoming, Laramie, Wyoming

EXPERIENCE:

- 1998 to Present Residential Real Estate Appraiser; Assessor; Appraisal Company of Alaska
- 1997 Construction Contractor Assistant; Ed Sanderson, Anchorage, Alaska

PROFESSIONAL AFFILIATIONS:

- Alaska Association of Assessing Officers; Alaska Certified Assessor Appraiser Level III; Certificate #194
- Certified Residential Real Estate Appraiser, State of Alaska Board of Certified Real Estate Appraisers; License #326
- Member, U.S. Ski Team 1994-1995
- Member, U.S. Olympic Ski Team, 1994 Olympics, Lillehammer, Norway

**QUALIFICATIONS OF
ARNE G. ERICKSON**

EDUCATION:

- 2008 Course Completion - Fundamentals of Real Property Appraisal.
Sponsored/conducted by AAAO.
- 2002 to
Present Appraisal Company of Alaska; Assessing Department
- 1983 Masters of Urban & Regional Planning; Eastern Washington University
- 1996 to
1997 Appraisal Company of Alaska; On-the-Job Training
- 1975 to
1980 Alaska Municipal League Sponsored Municipal Assessment Courses
- 1974 Bachelor of Arts – Community Planning; Eastern Washington University
- 1972 Bachelor of Arts – Political Science and Economics; University of Alaska

EXPERIENCE:

- 2002 to
Present Municipal Assessor; Appraisal Company of Alaska
- 1997-2002 Community Development Director; Bristol Bay Borough
- 1996-1997 Municipal Assessor; Appraisal Company of Alaska
- 1996-1990 EMS/HHS Coordinator; City of Unalaska, Alaska
- 1990-1983 Director of Planning; City of Unalaska, Alaska
- 1982- 1983 Assistant County Planner; Franklin County, Washington
- 1980-1982 Research Fellowship/Lecturer; Eastern Washington University
- 1975-1980 Administrative Assistant; Bristol Bay Borough
- 1974-1975 County Planner; Franklin County, Washington
- 1974 Community Planner; City of Winthrop, Washington
- 1966-1969 United States Lieutenant – Forward Support Platoon Leader

Qualifications of

Martins Onskulis

PROFESSIONAL SUMMARY

I am a recent graduate from the University of Alaska Anchorage with Master's in Business Administration – Statistics/DataAnalytics and with a bachelor's degree in aviation and Business Administration and additionally being the captain of the University Ski Team. I am an active volunteer for many organizations helping people in rural Alaska. I'm well-versed in negotiations, planning and development, relationship management, operations, and logistics coordination and scheduling. I am a hard worker, passionate skier, and amateur hockey player. Throughout my college and athletic career, I have learned the importance of hard work, honesty, and being grateful for what I have. Those principles and values have helped me to succeed in athletics and college. Since the age of 16, I have spent every summer working many different jobs, which has provided me with vast experience of problem-solving in ever-changing environments. In the past I have worked as a Management Intern at the Merrill Field Airport, where I gained practical skills, as well as a nuts & bolts perspective of what it takes to operate an airport. Currently I am working as an Assessor at Appraisal Company of Alaska and Alpine Ski Coach for Alyeska Ski Club.

PROFESSIONAL EXPERIENCE

FIS U19 Alpine Coach, 09/2019 to current

- Responsible for each athlete's development to her/his full potential by offering an appropriate blend of guided free- skiing, skill enhancement, technical improvement, and racecourse tactics in an atmosphere of fun and encouragement. Other tasks include creating outstanding citizens and expert, versatile skiers who would eventually become outstanding racers. Areas of focus include mental/physical preparation and course tactics.

APPRAISAL COMPANY OF ALASKA - ANCHORAGE

Assessor Trainee/Intern, 09/2018 to 09/2019; Assessor 09/2019 to current

- Responsible for determination of the taxability and value of properties, field inspection, structural measurement, calculation, sales analysis, market trend studies, and income and expense analysis. I am also responsible for preparing and maintaining current data on each parcel assessed, including maps of boundaries, inventories of land and structures, property characteristics, and any applicable exemptions. GIS mapping and analysis.

MERRILL FIELD AIRPORT - ANCHORAGE

Management Intern, 05/2017 to 08/2017

- I worked on multiple tasks, projects, and activities. Most of the projects and activities can be divided into daily tasks that involve office work, and the on-site activities. The description of my work, activities, and assignments existed from; observing and researching, developing new ideas and suggestions, assisting office staff with many activities, and attending meetings.

LLC SANITEX - RIGA

Plumber, 07/2016 to 07/2016

- Responsible for installing and repairing water supply lines, waste disposal systems, and related appliances and fixtures.

LLC BILD - RIGA

Equipment Manager, 05/2016 – 06/2016 and 05/2015 – 07/2015

- Responsible for planning, coordinating and directing the operations of all equipment for effective maintenance and repair programs, equipment safety programs and equipment use on company jobsites.
- Part time technical adviser on all equipment issues and assists the management team with equipment budgets and potential equipment purchases.

LLC ABRASIV – RIGA

Asphalt Paver, 06/2011 – 08/2011

- Responsible for placing the asphalt in hoppers or tanks.
- Monitor the machine's settings and the asphalt temperature.

LLC ABRASIV – RIGA

Asphalt Paver, 06/2010 – 08/2010

- Responsible for loading equipment and materials on trucks at the end of the day.
- Set up the equipment as needed, inspect it, clean it and perform routine maintenance or minor repairs.
- Responsible for traffic control, using flags or signs to direct traffic around the work area.

LLC ABRASIV – RIGA

Paver, 06/2009 – 08/2009

- Responsible for repairing and framing the work area.
- Inspect the ground for instability and, drain weak, soaked soils.
- Cutting and setting of the segments, correct spacing and alignment.

EDUCATION

Master's in Business Administration, Business Intelligence and Business Analytics, May - 2020

- GPA: 3.92/4.0
- Member of University Ski Team

Bachelor of Science in Aviation Management and Business Administration, May – 2018

- GPA: 3.65/4.0
- Member of University Ski Team

VALMIERA STATE GYMNASIUM – VALMIERA, LATVIA

High School Diploma, May – 2012

- GPA: 3.84/4.0
- Member of Soccer Team
- President of the Student Union

CERTIFICATION

- USSA Alpine Level 200 Coach
- USSA Alpine Competition Official Level 1
- USSA Alpine Referee Level 1
- Basic Appraisal Procedures
- Trainee Appraisal Course
- Basic Appraisal Principles
- 15-Hour Equivalent USPAP Course
- Certified Level 1 Appraiser (Alaska Association of Assessing Officers; Certificate 295)

ACCOMPLISHMENTS

- Member of Latvian National Men's Alpine Ski Team
- Participated in Winter Olympic Games in Sochi 2014.
- Participated in World Championships in Schladming 2013, Austria, World Championships in Beaver Creek 2015, USA. And many higher-level competitions.
- Volunteer for Alaska Special Olympics, Crow Creek Pass Run, Iditarod Dog Sled Race, Ski4Kids and SkiKu skiing program (around 340 hours). Most of the volunteering activities include North Slope communities – Barrow, Anaktuvuk Pass, and other places.

PRIMARY STAFF FOR HAINES BOROUGH ASSESSMENT PROJECT

LEAD APPRAISER: Michael C. Renfro – Supervisor/Valuations

STAFF: Arne Erickson – Field Work/Valuations

Martins Onskulis – Field Work/CAMA Systems

Sara Moore – Records Support for CAMA System

Michael Renfro, Arne Erickson and Martins Onskulis will be available for the 2024 BOE.

STATEMENT OF EXPERIENCE

The Appraisal Company of Alaska is a full service statewide real estate appraisal company that has been in business since 1976 under the current owner. The principal is Michael C. Renfro.

In addition to complete fee appraisal services on a statewide basis, the Appraisal Company of Alaska, under the direction of Michael C. Renfro, is the only firm in the state that maintains full-time ad valorem staff providing contract assessment and related appraisal services to communities throughout the state.

Appraisal Company of Alaska has, over the past 30 years, worked in all areas of the assessment field for twelve different communities and boroughs throughout the state of Alaska.

Appraisal Company of Alaska's areas of expertise range from field and construction inspections, valuations for difference communities and personal property assessment and valuations, including the Bristol Bay and Dillingham Drift Net fleets. In addition, we provide valuable expertise in Municipal valuation and lands issues with the addition of Arne Erickson, a graduate urban planner with past experience as the planner for the City of Unalaska and the Bristol Bay Borough.

As the assessment department is a major portion of our overall business, the staff and manager participate in continuing education in the ad valorem field to stay abreast of current technological changes. These include membership in the International Association of Assessing Officers (IAAO), the Alaska Association of Assessing Officers (AAAO) and the State of Alaska licensing program for real estate appraisers.

Michael C. Renfro is the overall General Manager and supervisor of the Ad Velorem department.

In addition, the Appraisal Company of Alaska has installed the ALASKA CAMA COMPANY, CAMA System in eight communities in the state.

As part of our statewide service, the Appraisal Company of Alaska maintains databases in the following communities, which are outside our principal areas of operation in Anchorage, Eagle River, Girdwood, Whittier and the Matanuska Susitna Valley:

1. All of the North Slope Borough including Barrow, Wainwright, Pt. Hope, etc.
2. Kotzebue
3. Nome
4. Unalaska and other Western Alaska, and Aleutian Communities
5. Dillingham
6. Bristol Bay Borough, Naknek and King Salmon
7. Valdez
8. Cordova
9. Yakutat
10. Wrangell
11. Petersburg

All of these communities and areas are serviced out of our Anchorage office.

The Appraisal Company of Alaska's main office is located in Anchorage, Alaska. The staff includes 10 full time and part time staff, appraisers and assessors. The office is automated with up to date computer systems and software. We use a la Mode (Wintotal) residential appraisal software with the Mercury Data system. We are completely EDI capable. The office runs on Microsoft software and ALASKA CAMA Company, CAMA software. To service our rural customers the Company maintains an in-state (800) number (1-800-478-4787).

VALUATION METHOD

At the award of the contract, the Appraisal Company of Alaska staff will review the 2023 sales ratio study to determine the level of assessment. Based on this study, the staff will determine those areas and type (residential by neighborhood, vacant land, industrial and commercial) of property which fall outside the acceptable valuation parameters.

The appropriate adjustments will be applied to raise or lower these values as determined by the sales ratio study. At the start of Appraisal Company of Alaska's tenure as Contract Assessor for The Borough, we will begin collecting data for our ongoing sales ratio analysis. The sales ratio analysis will be researched and updated throughout our tenure as Borough Assessor and will be used to verify and adjust the assessment ratio. The method of valuation based on the Sales Ration Study is the Market driven cost approach using the Marshall & Swift valuation tables and multipliers.

For 2024 due to limited time to print and mail notices, The Appraisal Company will work with the Borough Staff to identify issues in 2023. We will work to correct as many of these issues as possible and be available to communicate with the public. Prior to submitting this proposal, we have had several discussions with the Borough staff to identify the assessment issues.

FINANCIAL RESOURCES AND CERTIFICATE OF INSURANCE

The Appraisal Company of Alaska has been in business since 1976. All of our banking has been is now with Wells Fargo Bank. For verification of our credit worthiness or additional financial information regarding Appraisal Company of Alaska, call Michael C. Renfro at (1-800) 478-4787 If required, I will provide financial statements for Appraisal Company of Alaska but not for public disclosure. In the pas 40 plus years, the Company has completed all assessment assignments for up to twelve communities per year for the bid amount.

A certificate of insurance will be provided at the acceptance of this proposal.

RELEVANT WORK AND REFERENCES

Following are references from the various communities in which Appraisal Company of Alaska has performed assessment work and CAMA installation and conversion over the years. In each of these communities the Appraisal Company has also performed additional appraisal assignments.

CITY	ASSESEMENT REAL	PERSONAL PROPERTY	FEE APPRAISALS	INSURANCE VALUATION
Unalaska	X		X	X
Bristol Bay Borough	X	X	X	X
North Slope Borough	X	X		X
Valdez	X		X	X
Wrangell	X		X	X
Petersburg	X		X	X

*North Slope Borough has their own in house CAMA System.



REFERENCE

NAME OF CITY: City of Unalaska
CONTACT PERSON: Marjorie Veeder, Assistant City Manager
PHONE NUMBER: (907) 581-1252
MAILING ADDRESS: P.O. Box 610 - Unalaska, Alaska 99685-0610
DATES OF CONTRACTS: 1986 through 2024
NUMBER OF PARCELS: 932

DESCRIPTION OF WORK: Complete assessment duties including a reinspection of all improved parcels over the past six years. In addition, we have installed and updated the assessment rolls to a CAMA System. Additional services have included business personal property valuation (now done by the City staff), designing business personal property return forms. We have also completed substantial title research to update property records for both taxable and exempt properties.

Today the City runs their own GIS system and has developed a custom tax roll program that interfaces with Microsoft Access.

REFERENCE

NAME OF CITY: Bristol Bay Borough
CONTACT PERSON: Stephen Wilson, Finance Director
PHONE NUMBER: (907) 246-4224
MAILING ADDRESS: P.O. Box 189 - Naknek, Alaska 99633
DATES OF CONTRACTS: 1987 through 2024
NUMBER OF PARCELS: 1,881

DESCRIPTION OF WORK: Complete assessment duties including a reinspection of all improved parcels. We have assisted in the computerization of the tax roll for both real and personal property. In addition, we have printed and mailed the assessment notices and bills for two years during personnel transition. Additional services have included assisting the reinventory of all boats and the development of a standard boat valuation format, personal property valuation and use of the ALASKA CAMA COMPANY, CAMA Systems for real property valuation.

REFERENCE

NAME OF CITY: City of Valdez
CONTACT PERSON: Barb Rusher, Comptroller
PHONE NUMBER: (907) 835-4313
MAILING ADDRESS: P.O. Box 307 - Valdez, Alaska 99686
DATES OF CONTRACTS: 1982 through 2024
NUMBER OF PARCELS: 2,440

DESCRIPTION OF WORK: Complete assessment duties including four complete revaluations. Over the years, we have completely reinspected all the improved parcels and rewritten most of the assessment cards, now converted to the ALASKA CAMA COMPANY, CAMA System.

REFERENCE

NAME OF CITY: North Slope Borough
CONTACT PERSON: Mari Moore, Assessor
PHONE NUMBER: (907) 561-5144
MAILING ADDRESS: P.O. Box 69 - Barrow, Alaska 99723
DATES OF CONTRACTS: 1980 through 2024
NUMBER OF PARCELS: 5,348

DESCRIPTION OF WORK: Complete assessment duties including complete revaluations. Over the years we have reinspected all of the improved parcels and rewritten most of the assessment cards and the conversion of these cards to the Patriot CAMA System. Other duties include personal property valuations, review of all AS 43.56 properties within the Borough and insurance valuations of all Borough owned real property for Lloyds Insurance Group – London, England. We have become fully versed in the Borough Patriot CAMA valuation system.

REFERENCE

NAME OF CITY: City of Wrangell
CONTACT PERSON: Mason Villaroma, Financial Director
PHONE NUMBER: (907) 874-2381
MAILING ADDRESS: P.O. Box 531 - Wrangell, Alaska 99929
DATES OF CONTRACTS: 1990 through 2024
NUMBER OF PARCELS: 2,562

DESCRIPTION OF WORK: Work has included reinspection of all the Wrangell real property and several revaluation cycles. Also included was tracking sales during the closure of the Wrangell Lumber Mill, the largest local employer. We helped to develop an interface between the tax roll and the Accounting System. Also converted all assessment records to the ALASKA CAMA COMPANY, CAMA System.

COST PROPOSAL

The following fee schedule is a not-to-exceed cost per year to include all expenses and the Board of Equalization.

Year	Assessments	
2024	Update/BOE	\$50,000
2025	Update/Revalue	\$100,000
2026	Update/Revalue	\$75,000

Ownership of Work Products:

Ownership of all work products will be the Haines Borough.

SIGNIFICANT ENGAGEMENTS

City of Unalaska:

Scope	Date	Consultants	Contact
Assessments Valuation CAMA System installation	1986/Present	None	Majorie Veeder (907) 581-1251

North Slope Borough:

Scope	Date	Consultants	Contact
Assessments Insurance Valuations	2000/Present	None	Mari Moore (907) 852-0423

City of Valdez:

Scope	Date	Consultants	Contact
Annual Revaluation CAMA System installation	1982/Present	Yes, Oil and Gas Properties	Barb Rusher (907) 835-4313

City of Wrangell:

Scope	Date	Consultants	Contact
Assessments Revaluation Possessory Interest CAMA System installation	2000/Present	None	Mason Villarma (907) 874-2381

For 2024 the Appraisal Company will assist the Borough staff in updating the 2023 tax roll using the MARS CAMA program. We will review as many questioned properties as possible and be available to meet the public both before and after the assessment notices are sent out. Any changes to value will be supported by a complete sales ratio study. The Appraisal Company will have staff available to handle all the appeals, and we will meet with all appellants. We will coordinate and handle all appeals that go to the BOE. All work will be coordinated with the Borough staff.

If the Borough considers extending the contract for 2025, the Appraisal Company proposes the following.

The Appraisal Company will set up a systematic inspection schedule for all properties in the Borough. We will work with the staff throughout the year to field inspect as many properties as possible. We will update the MARS CAMA system and provide instruction to the staff on its use and operating system. All or any valuation changes will be based on an updated sales ratio study. In addition, we will work with Gary Greenburg to update the Borough's GIS system and parcel identification.

In 2026 the Appraisal Company will finish any work not completed in 2025. This also includes updating the MARS database. Continued instruction on the use of the MARS CAMA system with Borough Staff, and updating any valuations based on a current sales ratio study.

In every year the Appraisal Company staff will be available to meet with the public and represent the Borough at the annual Board of Equalization. Our goal is to assist the Borough in a systemic update of its assessment and assessing system. In addition to meeting with the Assembly and concerned citizens to answer questions about the assessment process and property valuations.



Haines Borough

Professional Services Agreement Assessment Services

AGREEMENT BETWEEN OWNER AND CONSULTANT

This Agreement is effective **January 24, 2024** and is between the **Haines Borough**, a municipal corporation organized under the laws of the State of Alaska with its principal place of business at 103 Third Avenue S., Haines, Alaska 99827 (“the Borough”) and **Appraisal Company of Alaska LLC**, a company with its place of business at 405 W. 27th Ave., Anchorage, Alaska 99503 (“the Consultant”). The Borough and the Consultant are sometimes collectively referred to as “Parties.”

The Parties agree as set forth below.

Article I - Contract Documents

1.1 The Contract Documents consist of this Agreement, Appraisal Company of Alaska’s January 12, 2024 proposal, and all modifications issued after execution of this Agreement. The Contract Documents shall form the Contract and are fully incorporated into this Agreement, and shall be a part thereof as if fully set forth herein. If anything in the Contract Documents is inconsistent with this Agreement, the Agreement shall govern.

Article II - The Work

2.1 The Consultant shall provide consulting and administrative services for the ad valorem property tax assessments for the Haines Borough per the attached proposal.

Article III - Time of Commencement and Contract Term

3.1 1. Terms of Agreement. This Agreement shall commence as of **January 24, 2024**, and shall continue to and including **July 1, 2025**. This Agreement may automatically be **renewed year-to-year so long as mutually agreeable and subject to satisfactory contractor performance and funding availability**. Contract conditions and rates may be renegotiated prior to any contract renewal. Either party may cancel the written contract by providing a minimum 30-day notice, in writing, with or without cause.

Article IV - Cost of the Work

4.1 The Consultant agrees to submit periodic invoices for work performed. The Consultant agrees to a budget not to exceed \$50,000 for the contract term of January 24-June 30, 2024 and \$100,000 for the contract term of July 1, 2024-June 30, 2025. Invoices shall be payable by the Borough according to its regular accounts payable schedule.

4.2 Additional Costs. The Haines Borough shall be responsible to provide the use of a Borough vehicle, when available.

Article V - Changes in the Work

5.1 The Borough may make changes in the work as provided in the Contract Documents. The Consultant may be reimbursed for changes in the work on the basis of negotiations between the Borough and the Consultant. The Consultant may be reasonably compensated for profit and overhead on changed work items.



Haines Borough

Professional Services Agreement

Assessment Services

Article VI - Subcontracts and Other Agreements

6.1 The Borough shall be notified in advance by the Consultant of any work being contemplated for assignment to any sub-Contractor and shall approve such tasks being contemplated prior to commencement of any sub-contractor work. The Borough reserves the right to reject or modify any sub-contract assignments, through direction to the Consultant.

6.2 All subcontracts shall conform to the requirements of the Contract Documents.

Article VII - Insurance

7.1 The Consultant and all subcontractors shall maintain the following types of insurance coverage and shall list the Haines Borough as an additional insured:

- a) General Liability
- b) Automobile Liability
- c) Errors & Omissions

Article VIII - Termination of Contract

8.1 The Borough retains the right to terminate the contract at any time for any reason, at the convenience of the Borough. If the Borough terminates the contract, it shall reimburse the Consultant for any unpaid cost of the work due. The Borough shall further assume and become liable for obligations, commitments, and unsettled claims that the Consultant has previously undertaken or incurred in good faith in connection with the work. The Consultant shall assign all interests or rights as the Borough may require for the purpose of vesting in the Borough the rights and benefits of the Consultant under such obligations or commitments.

Article IX - Miscellaneous Provisions

9.1 The Borough's representative under this agreement shall be the Borough Manager.

9.2 Consultant agrees to obtain and/or furnish to the Haines Borough a copy of its State of Alaska and Haines Borough business license.

9.3 This contract was approved by the Haines Borough Assembly per Resolution 22-12-1014 on January 23, 2024.

HAINES BOROUGH

CONSULTANT

Annette Kreitzer
Borough Manager
Date Signed _____

Michael C. Renfro, President
Appraisal Company of Alaska, LLC
Date Signed _____

Attest:

Alekka Fullerton, Borough Clerk