



"The Countrie it selfe, I must confesse is a very pleasant land, rich in commodities; and fertile in soyle..."

Samuel Argall, ca. 1609

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REQUEST FOR PROPOSALS
RFP #TH015-001

Surry County is now accepting competitive sealed proposals for the services of a qualified contractor to perform a general reassessment of real property to become effective January 1, 2016. This reassessment shall include taxable and nontaxable parcels and exclude the reassessment of public service properties. The County may chose to award a contract for up to 2 reassessment cycles.

I. Background

Surry is a rural county strategically located 10 miles south of Williamsburg, 50 miles southeast of Richmond and 50 miles northwest of Norfolk. The County comprises 279 square miles and has a population of just under 7,000. There are approximately 6,270 parcels of property listed with the Commissioner of the Revenue. Surry County includes the incorporated towns of Surry, Claremont and Dendron, which shall be included in any reassessment contract.

The County maintains an IBM AS/400 that networks the offices of the County Administrator, Finance, Commissioner of the Revenue, Treasurer and Building Inspections. The Bright and Associates Municipal software is used. Currently, real estate appraisal records are maintained in the Tyler Technology's Eagle Software. However, the County is researching the potential purchase of new appraisal software. This will be discussed in detail during the informal interviews.

II. Scope of Work

A. The contractor shall be certified as qualified by the Virginia Department of Taxation in order to be appointed by the Board of Supervisors to perform the reassessment. In all cases uniformity and equality are required under the laws of the Commonwealth of Virginia with respect to each class of property. All aspects of this general reassessment shall be conducted in accordance with the laws of the Commonwealth of Virginia.

B. The reassessment shall be conducted in a manner consistent with all applicable laws, regulations, rules, standards and case law. Appraisals shall be complete, uniform and at 100% fair market value. All taxable and nontaxable properties shall be visited and all elements of value appraised.

C. The contractor shall provide a professional assessor, certified by the Virginia Department of Taxation, to serve in lieu of a Board of Assessors in accordance with the *Code of Virginia, 1950, as amended*, §58.1-3275. The professional assessor shall be

approved by the Surry County Board of Supervisors and shall be assigned to the County for the duration of the reassessment project.

D. The contractor shall be expected to coordinate the activities of its employees to ensure timely completion of the work. It shall be required that the contractor cooperate fully with the offices of the County Administrator, Finance and Commissioner of the Revenue to control the quality of the work as well as deal with other relevant issues affecting the work.

E. The contractor shall perform a comprehensive sales data analysis prior to the appraisal of any real property in the County. This analysis will contain a sufficient number of valid real estate sales and/or transactions from the various classes of real estate within the County. This sales analysis shall become the property of the County at the completion of the general reassessment.

A separate sales study should be completed for commercial property, including water and wastewater availability and a differentiation of properties with and without water and wastewater systems.

F. All maps, sketches, plats, tax records, data and information in possession of the County pertaining to properties covered by these specifications will be made available to the contractor. This is to include the use of all information on property record cards.

G. The contractor's staff shall at all times be expected to display courtesy and professionalism in dealing with citizens, County staff, members of the Board of Supervisors and the Board of Equalization.

H. While in the field, the contractor's staff shall wear appropriate identification badges on their shirts to clearly identify themselves to citizens.

I. In those cases where the homeowner is not available and the contractor's employee cannot obtain all necessary information, a notice shall be left notifying the homeowner of the visit and requesting the homeowner to furnish the information.

J. The County will be responsible for providing furnished office space (if needed), computer support services, office supplies, postage, telephone service, information on previous reassessments, advertising any public hearings as required and conducting such hearings in accordance with the requirements of the *Code of Virginia, 1950, as amended*. The County will also provide maps to the contractor for use during the reassessment.

K. The contractor shall provide the following:

1. All necessary personnel, including appraisers and support staff; this shall include supervision for all said staff. The contractor shall also be responsible for staffing this office during regular County business hours. Additionally, the

contractor shall provide tools of the trade, living expenses, travel and any other expenditure necessary for completion of the reassessment.

2. The processing and mailing of reassessment notices;
3. Available staff for Board of Supervisors and/or Board of Equalization meetings on an as-needed basis;
4. The printing of the reassessment books;
5. Testimony and/or other assistance with any subsequent legal matters.

L. The contractor shall be responsible for making a complete exterior and reasonable interior inspection, which shall include measuring and sketching each residence and other major building improvement. The type of construction shall be recorded by component parts, including but not limited to foundations, basement area, wall construction, insulation, roof, floors, interior finish, heating system, fireplaces, plumbing fixtures, number of rooms, number of bedrooms, year built, year remodeled, exterior and interior condition, physical depreciation, functional and economic obsolescence, general quality of construction and recent sales data.

Suburban and farm dwellings shall be visited and inspected in the same manner as other residential buildings. All other farm buildings and structures shall be measured and numbered in relation to the main dwelling on the fieldwork card sketch and listed according to their use, type of construction, size, age and condition. These improvements shall be appraised at their fair market value.

M. Commercial properties shall be handled in the same complete manner as residential properties. Buildings shall be accurately measured and a complete description shown for each. The basic cost data shall be applied to existing construction for the determination of accurate and consistent replacement costs, less any physical depreciation, functional or economic obsolescence. In addition, income and expense data and market data will be used where applicable and available to assist in appraising the properties. Larger commercial properties should be valued using a recognized pricing guide manual.

All apartments or two or more dwelling units designed or redesigned for such occupancy and all groups of apartment buildings are to be classified as apartment properties. The appraisal of apartments shall be complete with analysis of income and expense data, if obtainable. The income approach to value shall be considered in apartment appraisals and where actual rents are not available, economic rental estimates will be used.

N. Small industrial plants shall be appraised in the same manner as other commercial properties. For the more complex industrial properties --- a complete, separate report, summarized, typed and bound shall be furnished. This report shall include a building-by-

building component part description of construction and fixed equipment taxable real estate, showing individual replacement value and depreciation for each. All yard improvements shall be listed individually and shall be priced and depreciated separately. Drawings of all buildings shall be made with buildings numbered and shown in their proper location and size with the name of the building as known to the industry shown. The market and income approach to value should be utilized, if applicable.

O. All other real property not covered previously and required by law to be appraised by the County will be appraised at fair market value using acceptable appraisal standards.

P. The contractor shall prepare a listing and appraisal of approximately 415 manufactured homes situated in the County. This listing should include, but is not be limited to, the make, size, condition, model, and year of manufacture, value, owner and location by tax map number.

Q. Prior to the informal hearings, reassessment notices shall be prepared by the contractor and mailed to all real property owners. All stuffing of envelopes and sorting of zip codes shall be completed by the contractor's staff. The informal public hearings will be conducted by qualified firm representatives in a room designated in the Government Center. The County will give public notice of these meetings.

The chief assessor and sufficient other qualified personnel satisfactory to the County shall be assigned to explain, discuss and hear all questions and concerns pertaining to the values established. The contractor shall immediately make any necessary field reviews of all properties of disputed value. They shall also be expected to substantiate the assessed value in question and the methods employed in the reappraisal as a whole. Additionally, they shall provide recommendations for the resolution of any such complaints.

R. The contractor shall furnish competent witnesses and supporting evidence as may be required to defend the valuations of any properties in questions before the Board of Equalization.

The contractor shall also furnish said witness or witnesses and evidence for all court appeals filed within 3 years from January 1 of the year in which the tax appraisal is effective without additional cost to the County.

S. The contractor shall pick up all new construction for the tax year 2016.

III. Specific Terms and Conditions

A. Potential contractors needing special assistance under the Americans With Disabilities Act shall contact Terri E. Hale, Finance Director, on or before Tuesday, January 6, 2015. Every reasonable effort will be made to allow every qualified vendor to participate in the competitive process.

B. Questions will be accepted in writing via email through the end of the business day Thursday, January 22, 2015. Written responses in the form of an addendum will be faxed to all vendors that received proposal information on Monday, January 26, 2015.

C. All submissions shall include a written narrative detailing the approach to the completion of the reassessment, the qualifications of the firm, resumes of the key staff and references from 3 similarly completed projects. **Attachment A, Contractor Data Sheet must be included in all submissions.**

D. Five copies of the proposal shall be received by the Finance Department on or before the closing date and time of Thursday, January 29, 2015, 3:00 PM. Proposals not received by the Finance Department by this date and time will be deemed undelivered and not accepted. "Sealed Proposal-Reassessment" should be noted on the outside of all submissions.

E. Ten percent of each invoice approved for payment shall be retained to insure satisfactory compliance and performance from the contractor.

F. Reassessment work should begin no later than July 1, 2015 and be substantially completed no later than December 31, 2015.

G. The contractor shall purchase and maintain sufficient insurance to protect him from claims in the following amounts:

Workers' Compensation	State of Virginia requirements
General Liability	\$1,000,000 per occurrence
	\$2,000,000 annual aggregate
Automobile	\$1,000,000 per occurrence
Professional Liability	\$1,000,000 per occurrence

A Certificate of Insurance naming Surry County as an additional insured shall be required within 10 days of the date of the award. The certificate must contain a provision stating that the coverages will not be canceled unless a minimum of 15 days prior written notice has been given to the County.

H. The contractor shall indemnify and hold harmless Surry County, its agents and employees from and against all claims, damages, losses and expenses, including but not limited to attorney's fees arising out of or resulting from the negligence the of contractor, his agents or employees during the performance of this contract.

IV. General Terms and Conditions

A. Anti-Discrimination:

By submitting bids or proposals, bidders, offerors or contractors certify to Surry County that they will conform to the provisions of the Federal Civil Rights Act of 1964, as amended, the Virginia Fair Employment Act of 1975, as amended, where applicable,

the Virginians With Disabilities Act, the Americans With Disabilities Act and Section 2.2-4311 of the Virginia Public Procurement Act, which provides:

1. During the performance of this contract, the contractor agrees as follows:

a. The contractor will not discriminate against any employee or applicant for employment because of race, religion, color, sex, national origin or disabilities, except where religion, sex, national origin or disability is a bona fide occupational qualification reasonably necessary to the normal operation of the contractor. The contractor agrees to post in conspicuous places, available to employees and applicants for employment, notices setting forth the provisions of this nondiscrimination clause.

b. The contractor, in all solicitations or advertisements for employees placed by or on behalf of the contractor, will state that such contractor is an equal opportunity employer.

c. Notices, advertisements and solicitations placed in accordance with Federal law, rule or regulation shall be deemed sufficient for the proposed of meeting the requirements of this section.

2. The contractor will include the provisions of the foregoing paragraphs a, b and c in every subcontract or purchase order of over \$10,000, so that the provisions will be binding upon each subcontractor or vendor.

B. Ethics in Public Contracting:

By submitting a bid or proposal, bidders, offerors or contractors certify that their bids or proposals are made without collusion or fraud and that they have not offered or received any kickbacks or inducements from any other bidder, offeror or contractor, supplier, manufacturer or subcontractor in connection with their bid or proposal and that they have not conferred on any public employee having official responsibility for this procurement transaction any payment, loan subscription, advance, deposit of money, services or anything of more than nominal value, present or promised, unless consideration of substantially equal or greater value was exchanged.

C. Immigration Reform and Control Act of 1986:

By submitting a bid or proposal, bidders, offerors or contractors certify that they do not and will not, during the performance of this contract, employ illegal alien workers or otherwise violate the provisions of the Federal Immigration Reform and Control Act of 1986.

D. Policy on Drug and Alcohol Abuse:

Surry County has adopted a Policy on Drug and Alcohol Abuse. The County's goal is to provide a safe workplace by eliminating the hazards to health and job safety created by alcohol and other drug abuse. This policy is intended to apply to contractors, subcontractors and employees of firms doing business with the County while on County

premises. By submitting a bid or proposal, bidders, offerors or contractors certify full compliance with this policy. A copy of the policy is available upon request.

E. Receipt of Bids/Proposals:

To be considered, bids or proposals must be received at the location provided and within the time period specified in the Invitation for Bids (IFB) or the Request for Proposals (RFP). Responses received after the specified date and time shall be returned unopened.

F. Acceptance/Rejection of Bids/Proposals:

Surry County reserves the right to accept or reject any or all bids or proposals or portion of any bid or proposal and to reissue said bid or proposal. The County reserves the right to award a contract based on a lump sum or per item basis or a sample provided.

G. Clarification of Terms:

Prospective bidders, offerors or contractors may submit questions in writing concerning the specifications or other solicitation documents no later than 7 working days before the due date. Any revisions to the IFB or RFP will be issued as an addendum.

H. Precedence of Terms:

Paragraphs A - G of these General Terms and Conditions shall apply in all instances. In the event there is a conflict between any of the other General Terms and Conditions and any Special Terms and Conditions in this solicitation, the Special Terms and Conditions shall apply.

I. Use of Brand Names:

Unless otherwise provided in this solicitation, the name of a certain brand, make or manufacturer does not restrict bidders, offerors or contractors to the specific brand, make or manufacturer named; it conveys the general style, type, character and quality of the article desired. Any article which the County, in its sole discretion; determines to be the equal of that specified, considering quality, workmanship, economy of operation and suitability for the purpose intended, shall be accepted.

J. Firm Prices:

Prices and all associated charges shall be firm for 60 days after the due date of the bids or proposals unless otherwise stated by Surry County.

K. Taxes:

Surry County (Federal I.D. #54-6001638) is exempt from Federal, State and local taxes. Taxes included on invoices will be deducted from the payment amount. Tax-exempt forms will be completed for a vendor upon request.

L. Delivery:

All costs and other charges associated with the delivery of a good or non-professional service shall be included in the bid or proposal. The County reserves the

right to cancel all or any part of a contract without obligation if delivery is not made within the time period specified in the bid or proposal document.

M. Required Signature:

All bids and proposals shall be signed with the firm name, Federal identification Number and by a representative possessing the authority to bind said firm with his/her signature. The County may request documentation of the signer's authority.

N. Qualifications of Bidders, offerors or contractors:

Surry County may make such reasonable investigations as deemed proper and necessary to determine the ability of a bidder, offeror or contractor to perform the work or supply the goods. The bidder, offeror or contractor shall furnish to the County all such information and data for this purpose as may be requested. The County reserves the right to inspect the bidder's, offeror's or contractor's physical facilities prior to award to satisfy questions regarding the bidder's, offeror's or contractor's capabilities. Further, the County reserves the right to reject any bid or proposal if the evidence submitted by, or investigations of such bidder, offeror or contractor fails to satisfy the County that such bidder, offeror or contractor is properly qualified to carry out the obligations of the contract and to complete the work or supply the goods.

O. Changes to the Contract:

Changes can be made to the contract in one (1) of the following ways:

1. The Finance Department may order changes within the general scope of the contract at any time by written notice to the contractor. Changes within the scope of the contract may include, but are not limited to, the method of packing or shipment or the place of delivery or installation. The contractor shall comply with the notice upon receipt. The contractor shall be compensated for any additional costs incurred as the result of such order and shall give the Finance Department a credit for any savings. Said compensation shall be determined by one of the following methods:

a. By mutual agreement between the parties in writing;

b. By agreeing on a unit price or using a unit price set forth in the contract, if the work to be done can be expressed in units and the Contractor accounts for the number of units of work performed, subject to the Finance Department's right to audit the Contractor's records and/or to determine the correct number of units independently;

c. By ordering the contractor to proceed with the work and to keep a record of all costs incurred and savings realized. A markup for overhead and profit may be allowed if provided by the contract. The same markup shall be used for determining a decrease in price as the result of savings realized. The contractor shall present the Finance Department with all invoices or other records of expenses incurred and savings realized. The Finance Department shall have the right to audit the records of the contractor as it deems necessary to determine costs or savings. Any claim for an adjustment in price

under this provision must be asserted by written notice to the Finance Department within 30 days from the date of receipt of the written order from the Finance Department.

P. Payment Terms:

All approved invoices will be paid within 45 days of receipt.

Q. Default:

In the case of failure to deliver goods or services in accordance with the contract terms and conditions, Surry County, after due oral or written notice, may procure them from other sources and hold the contractor responsible for any resulting additional purchase and administrative costs. This remedy shall be in addition to and cumulative with any other remedies the County may have under Federal, State and local law.

V. Evaluation and Award

Proposals will be evaluated as provided in Section 2.2-4302.2, in the Virginia Public Procurement Act and as provided below:

A. An Evaluation Committee consisting of the Commissioner of the Revenue and administrative staff shall be formed to review all submittals.

B. Each submittal will be reviewed according to the following criteria:

1. Qualifications of the firm and key personnel assigned for the duration of the project;
2. Specific approach to the completion of the project;
3. Cost of services;
4. References, including experience in localities with similar demographics;
5. Estimated workloads during the life of the project.

C. Following the review of the written proposals, the Evaluation Committee may engage in individual discussions with 2 or more offerors deemed fully qualified and best suited among those submitting proposals. If the committee chooses to conduct negotiations, they will be scheduled for the week of February 9, 2015 with each of the offerors selected. After negotiations have been conducted with each selected offeror, the Evaluation Committee shall select the offeror, which, in its opinion, has made the best proposal, and recommend that the Surry Board of Supervisors award the contract to that offeror.

D. At the conclusion of the negotiations, the project will be awarded by the Board of Supervisors on Thursday, March 5, 2015 at 7:00 PM.

**ATTACHMENT A
CONTRACTOR DATA SHEET**

**TO BE COMPLETED AND RETURNED BY THE CONTRACTOR
FAILURE TO FURNISH THIS DATA MAY RESULT IN DECLARING YOUR
QUOTE NONRESPONSIVE**

1. **QUALIFICATION OF CONTRACTOR:** The Contractor certifies that they have the capability and capacity in all respects to fully satisfy all of the contractual requirements.

2. **TYPE OF ORGANIZATION:** (check one) Individual Sole Proprietor
 Partnership Corporation Government Other

3. **YEARS IN BUSINESS:** Indicate the length of time in business providing this type of equipment and service: _____ years. Type of business:
_____.

4. **CONFLICT OF INTEREST DISCLOSURE STATEMENT:** Does any officer or employee of Surry County, Virginia, or member of their immediate family, have a personal interest in this contract? **YES / NO**

Personal interest shall exist by reason of (I) ownership of more than 3% of the total equity of the business; (II) annual income that exceeds, or may reasonably be anticipated to exceed \$10,000 from ownership in real or personal property in a business; (III) salary, other compensation, fringe benefits, or benefits from the use of property, or any combination thereof, paid or provided by a business that exceeds, or may reasonably be anticipated to exceed, \$10,000 annually; (IV) ownership of real or personal property if the interest exceeds \$10,000 in value and excluding ownership in a business, income, or salary, other compensation, fringe benefits or benefits from the use of property; or (V) personal liability incurred or assumed on behalf of a business if the liability exceeds 3% of the asset value of the business.

5. **CERTIFICATION:** The Contractor certifies by their signature below that the information provided is true, correct and complete.

Contractor's Name:	By (Signature in Ink):
Complete Address:	Name (please print) and Title:
	Date:
City/State/Zip:	Federal Identification Number:
Telephone Number:	Facsimile Number: