



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

Samuel Argall, ca. 1609

Surry County
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REQUEST FOR PROPOSALS
RFP #TH15-002

Surry County is now accepting competitive sealed proposals for the purchase and installation of new real estate assessment software. A general reassessment of real property will become effective January 1, 2016. All data entry, including sketches and photos, will utilize the new software.

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, including approximately 130 commercial parcels, of property listed with the commissioner of the revenue. Surry County includes the incorporated towns of Surry, Claremont and Dendron, these property values are maintained by the commissioner.

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 (BAI) Municipal software is used. Real estate appraisal records have been maintained in the Tyler Technology's (Eagle Computer Systems) CAMA+plus, AIMS+plus and Query +plus since 2004. Some of this information is then downloaded to BAI for billing and collection functions. Apex version 2 is used for sketching.

II. Scope of Work

A. The contractor shall provide a turn-key job, including installation, training, testing and data conversion. This coincides with a general reassessment, which will require the contractor to work closely with appropriate county and reassessment staff as needed.

B. 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 commissioner of the revenue, county administrator and finance to control the quality of the work as well as deal with other relevant issues affecting the work.

C. Hardware costs should be priced separately. The county may choose to purchase its own equipment in accordance with the contractor's hardware requirements. Minimal hardware requirements are provided in **ATTACHMENT A**.

D. System support should be described in detail, along with any annual maintenance costs.

E. Any costs, one-time or recurring, should be itemized and described in detail.

F. Preferred software capabilities are provided in **ATTACHMENT B**.

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, March 17, 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 Monday, March 30, 2015. Written responses in the form of an addendum will be emailed to all vendors that received proposal information on Wednesday, April 1, 2015.

C. All submissions shall include a written narrative detailing the approach to the installation and testing of the software, the qualifications of the firm, resumes of the key staff and references from 3 similarly completed projects. **Attachment C, 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, April 9, 2015 at 3:00 PM. Proposals not received by the Finance Department by this date and time will be deemed undelivered and not accepted. "Sealed Proposal-Appraisal Software" should be noted on the outside of all submissions.

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

F. Work should begin no later than June 1, 2015 and be substantially completed no later than August 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.

R. Cooperative Procurement:

Other governmental agencies may purchase from any contract resulting from this RFP.

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, county administrator, finance director, network administrator and other appropriate administrative staff shall be formed to review all submittals.

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

1. Applicability, ease of use and support of the proposed software;
2. Qualifications of the firm and key personnel assigned for the duration of the project;
4. Cost of services;
5. References, including experience in localities with similar demographics.

C. Following the review of the written proposals, the Evaluation Committee will 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 April 20, 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, May 7, 2015 at 7:00 PM.

ATTACHMENT A

Hardware and (non-appraisal) software requirements:

Six computers with widescreen monitors, wireless keyboard & mouse and CD writing capability, USB ports and speakers. It may be possible to reuse a few of the monitors for the part-time help computer & public use computers.

Current Windows operating system and Office Professional software.

Appropriately sized database server with shared drive.

Backup system with backup tape, online backup and iCloud capabilities. Also need 7 backup tapes or other media chosen. We currently have Brightstor ARCserve backup up system with tape drive.

LaserJet printer with duplexer and extra paper tray, similar to an HP LaserJet 425 DN. We currently have a HP LaserJet 4200 PCL6.

Any cables required for installation.

An appropriate system-wide battery backup.

ATTACHMENT B

New Assessment Program Requirements

- Compatible with Bright and Associates Municipal software
 - Map Numbers have to be compatible with BAI (up to 15 digit field length for map numbers including hyphens)
 - Roll values into BAI for billing and tax collections
 - Ability to roll owner name, mailing address, map number, district code, description, land value, improvement value, total value, acres, class code, deed book/page, will book/page, plat book/page, consideration and transfer date into Bright to create land book.
 - Ability to provide year end reporting to balance with BAI land book that is created from rolled data
 - Support a process to cross-reference parcel data in Bright to ensure all parcels are accounted for and valued.
- GIS data
 - Ability to interface with Worldview for the online GIS site. Ability to be linked to GIS to provide data such as dwelling features, out buildings, land descriptions, etc.
- System
 - Ability to maintain look up tables
 - Ability to search/query by owner name, map number, street address, mailing address, account number, deed book/page, etc.
 - Ability to see each change/version of updates including user initials, time & date of change.
 - Ability to work in system with different time periods (prior, current & future year) while still assessing in current year.
 - Ability to delete parcels but still retain historical data
 - Ability to view value after adjustment is made
- Sketching – Currently using Apex
 - Want an easy to use sketching program
 - Ability to sketch angles
 - No limit to # of measurements or size for sketch of larger houses
 - Ability for square feet to be calculated from sketch or user defined
 - Ability to change sketch as needed
 - Ability for each section of a building to be described separately
 - Ability to recalculate the appropriate sections due to sketch being changed.
 - Ability to enter comment on Sketch
 - Store sketch in history to capture changes.
 - Ability to copy sketch from one parcel to another
- Building Permits & New Construction
 - Ability to enter permit #, type, date issued, permit amount, description, status & comments and remarks.
 - Track Building Permits & create reports.
 - Possibility to dump building permits from BAI to real estate system
 - Ability to provide a report of new construction/demolition totals.
 - Ability to generate a notice of value change letter to owner at any time
 - Ability to assess new construction according to the percent complete
- Parcel & Ownership Data
 - Fields for owners name & mailing address.
 - Situs/911 address fields including city and zip code
 - Private Field for e-mail & telephone numbers.
 - Private field for ownership notes
 - Ability to click on or view additional owners when “ET ALS” is used for ownership
- Sales Data/Transfers/Plats & other recorded documents
 - Enter grantor/grantee, DB, PB, WB, instrument #, sales amount, type of deed/sale, qualified or unqualified sale
 - Ability to view or track deed book & page, info. wills, plats. etc.

- Public & Private comment field.
- Ability to calculate assessment to sale ratio
- Ability to create & manipulate a Virginia Sales Ratio File
- Ability to create reports using sales data-including historical sales data
- Ability to indicate parcels that were split, consolidated and/or subdivided
- Dwellings, Land, Outbuildings, Commercial & Other Improvements
 - Dwellings
 - Ability to assess dwelling features like fireplaces, attached garages, decks, attics and basements, septic & well etc.
 - Dwelling story, grade, depreciation, functional & economic obsolescence, etc.
 - Dwelling features such as heating type, air conditioning, frame, architectural style, exterior wall, year built, dormers, number of bedrooms & rooms, septic & well. These features may or may not change value
 - Assess multiple buildings per parcel
 - Land
 - Ability to assess land by acreage, lot or by lot dimensions (plus allow for adjustments).
 - Ability for multiple land descriptions per parcel such as home site, residual, cropland, waterfront, etc.
 - Outbuildings & Other Features
 - Assessment of outbuilding such as detached garages, sheds, barns. Etc
 - Ability to store outbuilding type, year built, condition, depreciation dimensions, price per square foot, etc.
 - Allow adjustment for depreciation, functional & economic obsolescence
 - Assessment of site improvements such as bulkhead/rip rap, mobile home hookups
 - Commercial
 - Ability to assess commercial structures by sketch & square footage.
 - Ability to adjust for depreciation, functional & economic obsolescence
- Assessment cards
 - Ability to print screen assessment card on computer instead of printing paper copy.
 - Ability to print multiple assessment cards at one time
 - Ability to print assessment cards from different years
 - Ability to e-mail and fax assessment card without having to print hard copy
- Help Desk or support
 - Help features in software
 - Support from Software provider
 - Remote access as needed
- Appraiser and Assessment Data
 - Ability to enter private appraiser notes
 - Ability to enter appraiser initials, date of visit, and if taxpayer is home
 - Ability to attach scanned documents that are not public information.
 - Ability to produce & store assessment change notices that include the immediately prior two tax years' final assessments on the notices. Allow or notices to be sent out for those parcels with value changes or to be sent to all parcels.
 - Allow notices that have been returned by the post office to be reprinted with corrected addresses for a second mailing attempt
- Reports/Queries/Letters
 - Standard built in reports such as sales reports
 - Ability to create & print other reports or queries as needed.
 - Display report of land, improvements and total for a parcel across multiple years.
 - Ability to export selected records and fields to MS Office software
 - Ability to produce assessment totals and books
 - Ability to create and generate various letters to taxpayers
- Flags
 - Flag assessor and BOE hearings & changes

- Flag and track appeals
 - Flag Building permits
 - Other flags as needed such as timber deeds, conservation easements
- Codes
 - County district codes
 - State Classification codes
 - Owner transfer codes
 - Neighborhood codes
 - Acreage codes
- View only use for public & other department use that has limited access to specific data
- Ability to attach documents, correspondence & photos to individual parcels
- Places to add public and private remarks
- Ability to maintain legal description

**ATTACHMENT C
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:	Email Contact