

County of Charlotte  
 PO Box 608  
 250 LeGrande Ave; Suite A  
 Charlotte Court House, VA 23923



**Request for Proposals for  
 General Real Estate Reassessment Services**

**Note: This public body does not discriminate against faith-based organizations in accordance with the Code of Virginia, § 2.2-4343.1 or against a bidder because of race, religion, color, sex, national origin, age, disability, or any other basis prohibited by state law relating to discrimination in employment.**

<u>Bid Number</u>	<u>Bid Due Date and Hour (Local Time)</u>	<u>Date Initiated</u>
<b>037-206</b>	<b>May 1, 2017 at 2:00 p.m.</b>	<b>April 4, 2017</b>

This solicitation is subject to the provisions of the General Terms and Conditions and any Special Terms and Conditions included herein. This RFP, your proposal, and modifications or additions to either shall constitute an entire integrated contract.

**Address All Inquiries and Correspondence to:**

County of Charlotte P.O. Box 608 250 LeGrande Avenue; Suite A Charlotte Court House, VA 23923	Monica L. Elder, Purchasing Agent Phone: (434) 542-5117 Fax: (434) 542-5248 Email: <a href="mailto:melder@charlotteva.com">melder@charlotteva.com</a>
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**Special Instructions:**

- Responses must be signed below in ink.
- Responses will be accepted until the date and hour shown above.
- This inquiry incurs no obligation on the part of the County of Charlotte.
- All proposals are considered firm for our acceptance within **60 days** after the due date.
- Charlotte County may cancel or withdraw a solicitation in whole or in part and reject any and all bids or proposals at any time prior to an award (Section 2.2-4319-Code of Virginia).

***In Compliance With This Request For Proposal No. 037-207, And To All The Conditions Imposed Therein, The Undersigned Offers And Agrees To Furnish Products/Services In Accordance With The Attached Signed Proposal Or As Mutually Agreed Upon By Subsequent Negotiation.***

SCC Number: \_\_\_\_\_

Name & Address of Offeror: \_\_\_\_\_

License Number: \_\_\_\_\_

\_\_\_\_\_ Date: \_\_\_\_\_

\_\_\_\_\_ Name (Print): \_\_\_\_\_

\_\_\_\_\_ Signature: \_\_\_\_\_

\_\_\_\_\_ Zip Code: \_\_\_\_\_ Title: \_\_\_\_\_

FIN: \_\_\_\_\_ Phone: (     ) \_\_\_\_\_

E-mail: \_\_\_\_\_ FAX: (     ) \_\_\_\_\_

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**I. PURPOSE**

The Board of Supervisors of Charlotte County, Virginia, herein referred to as "the County," is soliciting sealed proposals for the services of a qualified contractor to perform a general reassessment of all real property located in the boundaries of Charlotte County to become effective July 1, 2019. This reassessment shall include taxable and nontaxable parcels. In addition, the selected Offer shall be responsible for providing new construction appraisals during the contract term. All services shall be provided in accordance with the specifications herein and subsequent negotiations.

It is Charlotte County's intent that this Request for Proposal is part of a competitive procurement process which helps to serve the County's best interests while providing firms with a fair opportunity for their products and services to be considered. The process of competitive negotiation being used in this case should not be confused with the process of "competitive sealed bidding." Price is not required to be the determining factor, although it may be, and the County may negotiate with one or more firms to arrive at a mutually agreeable relationship.

**II. BACKGROUND**

Charlotte County is a rural jurisdiction located in South Central Virginia. The County is comprised of approximately 475 square miles and had an estimated population of 12,201 in 2015. Four incorporated towns, Charlotte Court House, Drakes Branch, Keysville and Phenix, are located within the County. These towns make up approximately 10.4 square miles of the County's total area and had a combined estimated population of 2,786 according to the US Census Bureau's 2015 American Community Survey. Properties within the towns shall be included in the reassessment.

There are approximately 12,886 taxable parcels and 552 non-taxable parcels listed with the Charlotte County Commissioner of the Revenue. General reassessments are conducted at six year intervals and the last reassessment for the County was effective July 1, 2013.

The County has a twice billing tax system based on the County's fiscal year (July 1st through June 30th.) Under this system, real estate & personal property values are assessed as of July 1st and taxes are due on December 5th and again on June 5th.

**III. SCOPE OF WORK**

Charlotte County is interested in reviewing/comparing options for traditional reassessment services involving field visits to all properties and image aided work approaches with reduced fieldwork. Firms should address both types of services, if offered, in their proposals.

#### A. Scope of Work

1. The Offeror shall be certified as qualified by the Department of Taxation. Failure on the part of the Offeror to demonstrate that he/she possesses the required certification shall constitute sufficient justification to render his/her proposal non-responsive and provide grounds for denial of a contract award.
2. The selected appraisal firm may begin work once the contract award is made. Offerors shall provide a projected work schedule, to include an estimated project completion date, in their proposals.
3. 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.
4. The appraisal firm shall provide a professional assessor, certified by the Department of Taxation, to serve in lieu of a Board of Assessors in accordance with the Code of Virginia. Said assessor shall oversee all work and instruct, supervise and direct all staff in connection with the reassessment. The professional assessor must be acceptable to the Charlotte County Board of Supervisors and shall be assigned to the County for the duration of the reassessment project.
5. The appraisal firm 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 past two years and shall include all classes of real estate. The sales analysis should be completed by the Offeror and reviewed by the County prior to the commencement of field work. Appraisals shall be based on these findings and the completed study shall become the property of Charlotte County upon the completion of the reassessment.
6. The appraisal firm shall cooperate fully with the offices of the County Administrator and the Commissioner of the Revenue to control work quality and deal with other relevant issues. In order to ensure consistency with the assessments, the appraisal firm shall limit the number of employees undertaking the fieldwork.
7. The appraisal firm shall assign only qualified personnel to conduct appraisals. If, for any reason, any member of the firm's staff is deemed to be unacceptable to the County, the staff member shall be removed from the project immediately.
8. The appraisal firm shall be responsible for tools of the trade, living expenses, travel and any other expenditures necessary for completion of the project. Under no circumstances are the appraisal firm's employees to be considered employees of the County.
9. The appraisal firm shall advertise in the local newspapers to inform taxpayers of the reassessment and the firm 's intent to inspect each property.

10. All taxable and nontaxable properties shall be visited and all elements of value appraised. The County encourages the use of new technologies and techniques that will maximize consistency of field work, improve efficiency and minimize field staff. Offerors are asked to provide a detailed description of these procedures in their proposal.
11. The appraisal firm shall record the following information for each visit: the date, time, name of appraiser, and person(s) interviewed and shall make said information available to the County.
12. If no one is available to answer questions at a property, a doorknob hanger shall be left notifying the resident of the reassessment and requesting any needed information.
13. If the appraisal firm is refused admittance or information by a property owner, the appraiser shall notify the Commissioner of Revenue. In such cases, appraisals shall be based on the information available.
14. The appraisal firm's staff shall deal with the public in a courteous and professional manner at all times. All employees of the firm shall maintain confidentiality of private records, including property values, until such time as they are mailed out to property owners.
15. While in the field, the appraisal firm's staff shall wear appropriate identification badges that clearly identify themselves to citizens. All vehicles used for data collection shall be clearly marked with decals provided by the appraisal firm and must be on file with local law enforcement.
16. The appraisal firm shall ensure that appraisal personnel are accessible to the Commissioner of the Revenue and the public when necessary.
17. The appraisal firm shall verify E-911 addresses for all improved properties and shall verify all existing property records for accuracy. Where no sketches exist, the appraisal firm shall develop sketches from actual field measurements and enter them in the CAMA system. The appraisal firm shall make every effort to collect any descriptive data not presently shown on the County field cards.
18. 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.

19. All apartments or two or more dwelling units designed 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.
20. The appraisal firm shall appraise all tax-exempt property on the same basis and in the same manner as taxable property. A summary of values and/or replacement costs on all County owned property shall be provided to the office of the County Administrator.
21. The appraisal firm shall provide a digital photograph (5 megapixel minimum) of each property, to include mobile homes, where no such photo exists or where significant upgrades have occurred. All photos taken pursuant to this RFP shall become the property of Charlotte County.
22. The appraisal firm shall produce a listing, where no such listing exists, and an appraisal of all manufactured or mobile homes in the County. The listing shall include, but is not limited to, the make, size, condition, model, year of manufacture, value, owner's name, physical address and location by tax map number.
23. The appraisal firm shall coordinate the assessment of new construction and new property divisions occurring during the contract period with the Commissioner of the Revenue, establishing guidelines and procedures to avoid duplications or omissions.
24. All appraisal data and any corrections to existing data identified by the appraiser will be coded and entered into the CAMA system by the appraisal firm.
25. Reassessment notices shall be prepared and mailed by the appraisal firm to all real property owners once appraisals are complete and before hearings are conducted.
26. The appraisal firm shall be responsible for printing the reassessment land books.
27. After completion of the appraisal work and at a time agreed upon by the appraisal firm and the County, reassessment hearings shall be conducted by the appraisal firm. Hearings shall include at least eight (8) sessions with some evening sessions and shall be held over a period of at least two weeks. Appraisers will be available at all hearings to provide information and or/review appraisals when requested by owners.
28. The appraisal firm will assist the Board of Equalization in the review of appraisals and property as needed or requested for up to ten (10) days or as otherwise needed.
29. The appraisal firm shall prepare and provide a comprehensive "appraisal manual" for the exclusive use of the County and the Commissioner of the Revenue detailing all formulas, classifications, codes, grades, charts, adjustment factors, tables and values used in the reassessment determinations for all property classes.

30. The appraisal firm shall furnish competent witnesses and supporting evidence as may be required to defend the valuations of any properties in question before the Board of Equalization. The Offeror shall also furnish said witness or witnesses and evidence for all court appeals filed within three (3) years from the effective date of the tax appraisal at no additional cost to the County.

**B. The County will provide the following:**

1. Adequate office space with basic office furniture to include desks, chairs & filing cabinet; telephone and phone service; and internet service for use by the appraisal firm's staff in conjunction with the reassessment;
2. Computer support services, forms, notices, the reassessment book, and comparative listings;
3. All maps, sketches, plats, tax records, data, photos and other information in possession of the County pertaining to properties covered by these specifications and all information concerning transfers and/or updates during the contract period. Offerors shall specify in their proposal if hard copies of property record cards will be needed.
4. All mailing costs (including postage for the reassessment notices) and advertising costs associated with the reassessment and hearings;
5. A copy of the Reassessment Manual from the County's last reassessment. This manual shall remain the property of Charlotte County and shall be returned to the County upon completion of the reassessment;

**IV. PRE-BID CONFERENCE**

Offerors are responsible for familiarizing themselves with the conditions and objectives of the proposed scope of work and the county's environment. A pre-bid conference will not be held.

**V. SUBMISSION OF PROPOSALS**

**A. Submission Procedures**

To receive consideration your proposal with original signature along with two (2) copies must be received in the Charlotte County Administrator's Office no later than **2:00 pm on Monday, May 1, 2017.**

The submission of proposals by fax, phone, e-mail, or verbal offer will not be accepted. All proposals must be in a sealed envelope clearly marked "REASSESSMENT PROPOSAL." Any offers or amendments received by the County after the date and time specified for the scheduled opening of proposals will not be considered. It is the responsibility of each Offeror to see that his/her offer is in the Office of the County Administrator by the specified date and time. Date of postmark will not be considered. There will be no extensions and no exceptions.

**Proposals can be hand-delivered or mailed to the following address:**

Charlotte County Administrator's Office  
Attention: Monica Elder, Purchasing Agent  
P. O. Box 608  
250 LeGrande Avenue, Suite A  
Charlotte Court House, Virginia 23923

*\*Please note that overnight courier services may not guarantee delivery to Charlotte County by 2:00 p.m. and plan accordingly.*

**B. Proprietary Information**

All proposals submitted under this RFP shall become the property of the County of Charlotte and will be subject to public inspection in accordance with the *Virginia Freedom of Information Act*. Trade secrets or proprietary information submitted by an Offeror shall not be subject to public disclosure under the *Virginia Freedom of Information Act*. However, the Offeror must invoke the protections of Section 2.2-4342F of the *Code of Virginia*, in writing, either before or at the time the material is submitted. The written notice must specifically identify the materials to be protected and state the reasons why protection is necessary. The proprietary or trade secret material submitted must be identified by some distinct method, such as highlighting or underlining, and must indicate only the specific words, figures or paragraphs that constitute trade secret or proprietary information. The classification of an entire proposal document as proprietary or trade secrets is not acceptable and will result in rejection of the proposal.

**C. Proposal Content**

All proposals submitted shall contain the following:

1. Completed cover page of this RFP
2. A narrative explaining the Offeror's expertise and experience, specifically relating to the services outlined in this RFP.
3. A description of the proposed project approach(es) with proposed work plan(s) including a tentative schedule and estimated completion date and a price per parcel for reassessment services to include all costs associated with specifications outlined in this RFP.
4. References from at least three recent projects for which the Offeror provided services similar in scope and complexity. Include contact's name, address, telephone number, description of services performed, and date of services.
5. Resumes of all key personnel who will be involved in this project.

6. Disclosure of any review or disciplinary action taken by the Virginia Real Estate Board (or the equivalent board of another jurisdiction, if applicable) during the past five (5) years with regard to any certificates & professional licensure of all key personnel.
7. Completed copy of all addenda issued.
8. Although this RFP is intended to cover all required items, if an Offeror's services require an item not mentioned, the Offeror must inform the county of such item, with a description, pricing and any other details required for successful implementation.

D. Additional Information

Offerors are requested and advised to be as complete as possible in their response. The County may:

- Contact the Offeror to clarify any response
- Contact current users of an Offeror's services
- Solicit information from available sources concerning any aspect of the proposal
- Seek and review any information deemed pertinent to the evaluation process

## VI. QUESTIONS & ADDENDA

A. Questions

1. All questions regarding this RFP must be submitted in writing via e-mail, fax, or hand-delivery to the Charlotte County Purchasing Agent and must be received by the County no later than 2:00 pm on April 19, 2017.
2. All responses to questions will be provided in an official written addendum.
3. Oral instructions do not become part of the proposal documents.

B. Addenda

All addenda issued shall become part of this RFP. It is the responsibility of each Offeror to ensure that they obtain a copy of all addenda. Addenda will be posted on eVA and the Charlotte County website, [www.charlotteva.com](http://www.charlotteva.com).

## VII. EVALUATION OF PROPOSALS AND SELECTION PROCEDURE

The evaluation and selection processes will be governed by and completed in accordance with the Virginia Public Procurement Act (VPPA). If any provision of this Request for Proposal is found to be inconsistent or in conflict with such policy, the terms of the VPPA shall govern.

A. Proposal Evaluation Criteria:

The following criteria will be used to review and evaluate proposals:

1. Experience and Qualifications (30%) - The experience of the Offeror in providing reassessment services similar in scope and complexity for other rural localities and the qualifications of appraisers and other staff assigned to the project and their familiarity and knowledge of reassessment requirements and procedures, rural real estate, and taxation concerns
2. Work Approach (30%) – Offeror's understanding of the scope of work, the project approach, the project schedule, ability to provide organized and professional quality services, demonstrated solutions to achieving a cost-effective project, and record for completing projects in a timely manner.
4. Cost (40%) – The best value to the County for the services to be provided.

B. Selection Process

1. Using the proposal evaluation criteria specified above, the County will review all proposals received.
2. After review of the proposals, the County shall engage in discussion meetings and/or interviews with two or more of the Offerors who have been deemed to be fully qualified, responsible, responsive, and suitable to provide the services set forth by this Request for Proposal. Such discussions will be used to gather additional information regarding Offerors' qualifications, expertise, and experience. In addition, the selection committee may pursue alternative concepts and approaches for the project.
3. Using information obtained during the proposal review and the discussion and interview phase, the County will rank the Offerors. Cost estimates shall be considered, but need not be the sole determining factor. The County will then select, in order of preference, two or more Offerors whose professional qualifications are deemed most meritorious. Negotiations will be conducted beginning with the Offeror ranked first. If a contract satisfactory and advantageous to the County can be negotiated at a price considered fair and reasonable, the award will be made to that Offeror. Otherwise negotiations with the Offeror ranked first will be formally terminated and negotiations will be conducted with the Offeror ranked second, and so on until such a contract can be negotiated at a fair and reasonable price.
4. Should the Charlotte County Board of Supervisors determine in writing and in its sole discretion that only one Offeror is fully qualified, or that one Offeror is clearly more qualified than the others under consideration, a contract may be negotiated and awarded to that Offeror.

**VIII. PAYMENT**

After work commences, invoices will be submitted monthly to the County up to 90% of the contract amount, with a 10% retainer as a performance guaranty. The amount of each monthly invoice shall be based on the amount of work completed in the previous calendar month. The 10% retainer shall be payable upon delivery of all appraisal work and completion of the public hearings.

**IX. SPECIAL TERMS AND CONDITIONS**

A. Termination of Contract

Should the Offeror fail to perform the work according to accepted methods, the County has the right to terminate the contract immediately. Upon such termination of the contract, the Offeror shall immediately cease work and deliver to the County any and all materials and/or information kept on file, created or obtained on behalf of the County. The County shall complete the remaining work by whatever method it may deem expedient. In the event of termination pursuant to this paragraph, the Offeror shall be paid for all services provided through the date of termination less any fines, remedial costs or other fees that may be withheld.

B. Insurance

The successful Offeror shall purchase and maintain sufficient insurance to protect him from claims in the following amounts:

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

The successful Offeror shall also maintain professional liability coverage for errors and omissions. A Certificate of Insurance shall be required within ten (10) days of the date of the award. The certificate must contain indicate that coverage will not be canceled unless a minimum of fifteen (15) days prior written notice has been given to the County.

**X. GENERAL TERMS AND CONDITIONS**

- A. All proposals must be submitted in accordance with this RFP. All information received shall become part of the proposal.
- B. The Offeror certifies that he/she knows of nothing that could raise the issue of conflict of interest with regard to this RFP.

- C. A contract shall be deemed executory only to the extent of appropriations available for the purchase of such the same or similar goods or services as requested in this proposal. Future obligations shall be subject to future appropriations, if any, by the Board of Supervisors. Nothing contained herein shall be construed to require any future obligation by the Board of Supervisors.
- D. The award of a contract shall be at the sole discretion of the County Board of Supervisors. The award shall be based upon the evaluation of all information as made available to the County. The Board reserves the right to enter into any contract deemed to be in its best interest. The County shall not be obligated to furnish a statement of the reason why a proposal was not deemed to be the most advantageous.
- E. An officer of the proposing firm must sign the proposal and all issued addenda. Such signature shall bind the firm to all obligations under this RFP.
- F. By submitting a response to this RFP, the Offeror acknowledges and agrees that:
  - 1. The RFP is understood and the Offeror is fully informed of the intent of the RFP and the completeness and quality of the products, materials and services sought.
  - 2. The vendor's proposal will constitute a "bid" and offer for contract, which shall remain irrevocable for a period of 60 days from the date of the opening of the bids.
  - 3. The RFP and bid responses will be incorporated into and made part of any contract award to the successful Offeror.
- G. The County shall not be responsible for any expense incurred by any Offeror in preparing and submitting a proposal or participating in the interview and negotiation processes.
- H. All proposals shall become the property of Charlotte County. They will not be open for public inspection prior to final selection by the Board of Supervisors.
- I. The Charlotte County Board of Supervisors reserves the right to accept or reject any or all proposals in whole or in part and to waive any informality in the RFP.
- J. This RFP, any subsequent contract and the work performed there under shall be governed in all respects by the laws of the Commonwealth of Virginia. The Offeror shall comply with applicable federal, state, and local laws and regulations.
- K. The Offeror shall not assign, transfer, convey, sublet, or otherwise dispose of any award, or any or all of its rights, obligations, or interests under this contract, without the prior written consent of the County.
- L. The Offeror shall indemnify and save harmless Charlotte County, its supervisors, officers, agents, servants, and employees from and against any and all liability, claims, losses, suits,

legal proceedings, and costs, including but not limited to attorney's fees, arising or resulting from any cause whatsoever in any work required by this RFP.

- M. The Offeror shall agree to the nondiscrimination provisions set out in § 2.2-4311, Code of Virginia.
- N. The Offeror shall agree to the drug-free workplace provisions set out in § 2.2-4312, Code of Virginia.
- O. The Offeror shall agree to comply with all federal immigration laws. The Offeror shall not knowingly employ an unauthorized alien immigrant as defined in the Federal Immigration Reform and Control Act of 1986.
- P. **Proof of Authority to Transact Business in Virginia**  
In accordance with §2.2-4311.2, Code of Virginia, Offerors organized or authorized to transact business in the Commonwealth pursuant to Title 13.1 or Title 50 shall include the identification number issued to it by the State Corporation Commission. Any Offeror not required to be authorized to transact business in the Commonwealth as a foreign business entity under Title 13.1 or Title 50 or as otherwise required by law shall include a statement describing why they are not required to be so authorized.