

**COUNTY OF SUSSEX**  
**Request for Proposals Number #2016-02**  
**General Reassessment Services**

**GENERAL INFORMATION**

The County of Sussex, Virginia is located in the southeastern portion of the Commonwealth of Virginia with a population of approximately 12,000. The county has 9,529 parcels of real estate at the time of this request for proposal and of that number 8,940 is taxable and 589 is non-taxable. The County has been on a six (6) year reassessment cycle with the last general assessment effective for the tax year January 1, 2012. However, with this request, the County has moved to a four (4) year general assessment cycle. The successful appraisal firm shall perform and provide all the services and products required for the completion and delivery of the property assessment of all real property within the County of Sussex, effective for the tax year 2018 including all necessary technical and administrative assistance services in connection with such undertaking.

The Appraiser shall make a complete, uniform reassessment of all real property within the County, excluding public service properties and including the inventory and valuation of all non-taxable (exempt) properties and the classification of all real property in accordance with the requirements of the State of Virginia. The values to be estimated in all cases shall be 100% fair market value as required by the Virginia Constitution and applicable Virginia statutes. Generally, the Courts of Virginia have defined fair market value as follows:

"The fair market value of a property is the price which it will bring when offered for sale by one who desires, but is under no duress to sell and is brought by one who is under no undue necessity of buying, with both buyer and seller being knowledgeable of the uses to which the property is adaptable."

The Appraiser's role is to work with the County of Sussex and serve as a professional assessor in order to establish the fair market value of each of the properties within the County, and with the understanding that in all cases, uniformity and equality are required under the laws of the State of Virginia with respect to class and/or property. All aspects of this reassessment program shall be conducted in accordance with the laws of the State of Virginia. The property reassessment will begin within fifteen (15) days from the awarding of the contract and will be completed by December 31, 2017 with any extensions only as necessary and authorized under the Code of Virginia.

**SCOPE OF WORK**

The Appraiser agrees to perform the following general reassessment services for the County of Sussex, Virginia. The Appraiser will conduct a comprehensive sales data analysis which shall include, but not be limited to, a review of all real estate sales and/or transactions from the various classes of real estate within the County, which shall be made prior to any real property. These sales shall be divided into two categories and ratio studies shall be performed for each class of houses and land. The two categories are (1) building sales; and (2) land sales:

- 1) The Building Sales review shall be as stated above and shall additionally be reviewed and analyzed by quality of construction, type, age and location. Photos shall be taken, and made available to the County and shall become the property of the County, of homes used in the sales analysis.
- 2) The Land Sales Review shall be reviewed as stated above and shall additionally be reviewed and analyzed by their location, zoning, classification and size. Photos shall be taken, and made available to the County and shall become the property of the County.

The Appraiser shall, at the completion of the reassessment, provide to the County all sales analysis, and all documents and pictures generated from the studies. These sales analysis and all documents (manual and electronic) shall become the sole and exclusive property of the County. This information will be made available to the Commissioner of the Revenue during the reassessment program. The Appraiser, at the written or oral request of the County at any time during the previously stated reassessment period, shall forthwith make the completed or partially completed sales analysis or any part thereof designated by the County, available to the Board of Equalization or any other County agency or department designated by the County.

An appraisal manual shall be prepared from the previously stated data and analysis and this manual shall be used throughout the general reassessment as well as the interim period following this and the next general reassessment. Two copies, at the sole expense of the firm shall be provided to the Sussex County Commissioner of the Revenue's Office on dates as agreed upon by the Appraiser and the Commissioner of the Revenue. Thereafter, all copies of said manual shall be delivered to the Commissioner of the Revenue. The manual so prepared shall be the sole and exclusive property of the County.

The Appraisal Manual shall also include the guidelines for appraisal or the various classes of timber and the methods used to define these categorical breakdowns and/or classifications.

Property record cards shall be prepared and designed so as to show all items of information, including but not limited to, depreciation and pricing data for each building together with the owner's names, address, legal description of the real estate parcel, map number, et cetera. Additionally, this property record card shall show all criteria used in determining land value and classification, plus an area on said individual card for recording total land and building values.

The firm's certified appraisal personnel shall make a personal inspection of each parcel of property and any improvements or other elements prior to the placement of value thereon or thereupon. If practicable, the property owner should be interviewed and any and all data which shall be necessary for a fair and equitable assessment of each real estate parcel should be collected.

The minimum field inspection data to be collected shall include the measuring of all buildings, coded and prepared for computer entry for all parcels in the County. A parcel, for purposes of this document, shall be defined as each line used on the land book. A complete exterior and reasonable interior inspection shall include the measuring of and sketching of each residence and any other major building and improvements. Further, a digital photograph, which shall become the sole and

exclusive property of the County, shall be taken of all major improvements which exists on the property and shall include any outbuilding valued over five thousand (\$5,000.00) dollars.

In addition to the above required data, types of construction shall be recorded by component parts, such as foundations, basement areas, wall construction, insulation, roof, floors, interior finish, heating systems, fireplaces plumbing fixtures, number of rooms, number of bedrooms, number of bathrooms, year built, year remodeled, exterior and interior condition, physical depreciation, functional and economic obsolescence, general quality of construction and recent sales data. All information so gathered shall be recorded on appraisal cards. The minimum field inspection data to be collected shall be all buildings measured, coded and prepared for computer entry for all parcels in the County. A parcel, for purposes of this document, shall be defined as each line used on the land book. A complete exterior and reasonable interior inspection shall include the measuring of and sketching of each residence and other major buildings and improvements. Certified appraisal personnel of the firm shall view the property prior to the preparation of a market assessment.

On improved properties where no one is found to be at the property, a door hanger, as provided by the County, shall be left informing the owner that a reassessment is being conducted and requesting any needed information on the property. The firm's personnel shall make a notation on the field card and the property shall be appraised based on the best information available at that time.

Mandatory Appraisal Requirements regarding assessment of certain properties shall be as follows:

- a) **Manufactured/Mobile Homes:** The appraiser shall appraise all manufactured/mobile homes as real estate if the manufactured/mobile home is sitting on a permanent foundation with the hitch removed.
- b) **Residential Properties:** The appraiser shall be responsible for making a complete exterior and reasonable interior inspection which shall include measuring and sketching each residence and other major building improvements. The type of construction shall be recorded by component parts, such as foundations, basement area, wall construction, insulation, roof, floors, interior finish, heating system, fireplaces, plumbing fixtures, number of rooms, number of bedrooms and bathrooms, year built, year remodeled, exterior and interior conditions, physical depreciation, functional and economic obsolescence, general quality of construction and recent sales data.
- c) **Rural Properties:** Suburban and farm dwellings shall be visited and inspected in the same manner as residential buildings. All farm buildings and structures shall be measured, spotted and numbered in relation to the main dwelling on the fieldwork sketch card and listed according to their use, type of construction, size, age and condition. These improvements shall be appraised at their fair market value.
- d) **Commercial and Industrial Properties:** These properties shall be handled in the same manner and methodology as used in the appraisal of residential property. New construction and additions 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 shall be used where applicable and available in assessing the properties.

- e) Apartment Buildings: All apartments of four or more dwelling units designed or redesigned for such occupancy, and all groups of apartment buildings are to be classified as analysis of income and expense data, if obtainable. The income approach to value must be considered in apartment appraisals and where actual rents are not available, economic rental shall be used.
- f) Industrial Plants: All industrial plants shall be appraised in the same manner as commercial properties. All yard improvements shall be listed individually and shall be priced and numbered; (A) Small Industrial Plants shall be appraised in the same manner as other commercial properties; (B) Major Industrial Complexes considered to be major industrial complexes, shall require a complete and separate report which shall be summarized, typed and bound and furnished to the County. This report shall include a building by building component part description of construction and fixed equipment taxable as real estate and shall show 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 size with the name of the building as known to the industry shown. The market and income approach to value shall be used if applicable; (C) All other properties not covered previously and required by law to be appraised, shall be appraised at market value using the acceptable appraisal standards. Timber shall be set out as a separate value; (D) New construction constructed during 2017 shall be appraised through December 31, 2017.

Prior to any informal administrative or other hearing, the Appraiser shall prepare and mail reassessment notices to all affected real property owners. This shall include the stuffing of all envelopes and the sorting of zip codes by the personnel of the appraisal firm.

Prior to any informal administrative or other hearing, when requested by the County, the Appraiser shall prepare for and conduct any informal hearing regarding this general reassessment, by furnishing qualified firm representatives to conduct the same, at a mutually agreed upon location in the County of Sussex, Virginia as furnished by the County. The Appraiser shall furnish written recommendations to the County for the disposition of any complaints made as a result of this general reassessment within ten (10) days of any such informal hearing.

The Appraiser shall furnish written recommendations to the County for the disposition of any complaint as a result of this general reassessment upon request of the County within ten (10) days of such request.

In the event of an appeal to any Court in the Commonwealth of Virginia, the Appraiser shall furnish such competent witness or witnesses and supporting evidence as may be required to defend the valuation(s) of the property in question.

The Appraiser or his designated agent shall meet with the Board of Equalization on an as- needed basis during the time period specified in the agreement between the County and the Appraiser, if so requested.

### **APPRAISER'S PERSONNEL AND WORK SPACE**

The Appraiser shall use only qualified appraisers of good character with a minimum of ten (10) years of appraisal experience and shall use an adequate number in order to expeditiously perform the work called for in this Request for Proposal. The Appraiser and its employees are not employees or agents of the County. The Appraiser agrees that all of its employees shall have sufficient skills and experience to properly perform the work assigned, by the Appraiser to them, under this Request for Proposal.

All employees performing these appraisals and other skilled workers shall not be less than twenty-one (21) years of age and shall have sufficient education, training and experience in any phrase of the work assigned to them so as to perform properly and satisfactorily in the manner prescribed by this Request for Proposal.

Upon request of the County, any employee shall provide, through the Appraiser's company, satisfactory proof, by verified affidavit, as to his or her appraisal experience in a particular field.

Complete instructions and directions of all personnel of the Appraiser connected with the reassessment program shall be supplied by the Appraiser, subject to the advice and review of and by the County.

All clerical personnel involved in the property reassessment shall be the responsibility of the Appraiser. The County shall furnish, as available, all necessary office space with furnishing. All data processing, including the appraisal cards, reassessment book and notices shall be provided by the County.

### **INSURANCE**

The Appraiser shall carry public liability, Workmen's Compensation and any other job related insurance designed to save and hold harmless the County, its officers and/or officials from all claims, demands, suits, actions, recoveries, judgments of any kind and description brought or recovered against them by reason of any act of the Appraiser, the Appraiser's agents, employees or subcontractors during the execution of the work project.

In addition to the insurance requirements as stated, the Appraiser shall also provide liability coverage. All insurance coverage shall name the County as an additional insured for this project. The limit of liability shall be at least one million (\$1,000,000.00) dollars.

### **AVAILABILITY OF FUNDS**

The County shall be bound only to the extent of the funds available or which may hereafter become available for the purpose of this project.

## **FEDERAL AND STATE AGREEMENT REQUIREMENTS**

The Appraiser agrees to abide by and conform to all federal, state and local laws and regulatory requirements, including but not limited to, the federal Civil Rights Act of 1964, as amended, the Federal Immigration Reform and Control Act of 1986, as amended, and the Virginia Fair Employment Contracting Act of 1975, as amended.

## **PROPOSAL FORMAT**

Each proposal should include and be organized in a format similar to the following:

1. Description of the firm to be involved in the project, including current declaration page of professional liability, malpractice or error and omissions insurance indicating policy limits.
2. Description of the firm's concept of this project, methodology and time frame for accomplishing this scope of work.
3. Description of the firm's experience in performing similar types of work.
4. Provision of resumes for the persons to be assigned to the project along with their responsibilities.
5. List a minimum of three (3) reference (localities); identifying their lead staff person and providing phone numbers and/or email addresses, for whom the firm has been, or is, providing these same or similar services.

## **SELECTION PROCESS**

Sussex County staff will perform the following:

1. Preliminary review - County staff in conjunction with representatives from the Sussex Board of Supervisors will review all proposals and select a minimum of three for interviews.
2. Interviews - County staff and/or representatives from the Board of Supervisors will interview the selected firms and rank them according to the following criteria:
  - a. The firm's understanding of the work to be performed.
  - b. The proposed methodology for performing the work.
  - c. The results of reference checks on past work.
  - d. The firm's overall background and experience conducting this type of work. The county prefers a firm conducting this type of work exclusively for the public sector.
3. At this time, firms will be requested to provide non-binding cost estimates for the project and staff hours to perform the task.
4. Final Selection - County staff will rank the firms and will negotiate a contract pursuant to the procedures set forth in the Virginia Public Procurement Act.
5. Award - County staff will recommend to the Sussex County Board of Supervisors the awarding of the contract. With the awarding of the contract by the Board of Supervisors, the selection process is concluded.

## **ADMINISTRATIVE MATTERS**

- A. Interested firms must submit one (1) original and four (4) copies of their proposal no later than 4:30 p.m., Friday, July 8, 2016 to Patricia B. Poole, Sussex County Administrator's Office, Post Office Box 1397, Sussex, VA 23884 (physical address: 20135 Princeton Road, Stony Creek VA 23882). Phone (424) 246 1000
- B. Any request for clarification of any information contained in the RFP must be made in writing to the County Administrator at the address set out in subsection A. Any substantive clarifications will be mailed to all firms requesting the RFP. The County will not be responsible for any oral communications.
- C. Proposals received after the deadline of 4:30 p.m., Friday, July 8, 2016 or proposals that are faxed, emailed or telephoned will not be accepted. An original ink signature of an authorized principal of the firm and four (4) copies of the proposal must be submitted. The proposal must contain the full name of every person, firm or corporation involved and the address of the person, firm or corporation or firm submitting the proposal. If incorporated, identify the state in which incorporated.
- D. Proposals must be delivered by the stated deadline. Proposals arriving after the specified hour will not be accepted. Should a firm submitting the proposal finds any discrepancies or omissions in the proposal documents, the County Administrator shall be informed in writing. The County will not be responsible for any oral communications.
- E. Sussex County reserves the right to reject any and all proposals. Any proposal not in conformity with the Request For Proposal will not be considered.
- F. Sussex County will not be responsible for any expense incurred by the firm in preparing and submitting a proposal in response to this request, nor shall the County be responsible for any cost associated with negotiating an agreement with the selected firm. All proposals become the property of Sussex County.

Thank you for your interest in Sussex County, Virginia.