



Request for Proposal (RFP)# 25-08

for

General Reassessment Services

Issue Date: March 13, 2025

Proposal Due Date and Hour: April 16, 2025 3:00 p.m.

Last Day for written questions: March 31, 2025

Montgomery County Purchasing Department
755 Roanoke Street, Suite 2C
Christiansburg, VA 24073-3179

TABLE OF CONTENTS

Request for Proposal Number 25-08

General Reassessment Services

<u>Section #</u>	<u>Description</u>	<u>Page Number</u>
I	Purpose.....	4
II	Background.....	4
III	Statement of Need	5
IV	Proposal Preparation and Submission Requirements.....	14
V	Evaluation and Award of Contract	17
VI	Price Schedule	18
VII	Pre-proposal Conference.....	18
VIII	Reservation of Rights	18
IX	Contract Administration.....	19
X	Payment Procedures	19
XI	Contract Period.....	20

ATTACHMENT A: Terms and Conditions

ATTACHMENT B: Montgomery County Standard Contract (sample)

ATTACHMENT C: Certification Criteria for Contracted Virginia Real Estate Assessment Professionals (Effective January 1, 2025)

ATTACHMENT D: Sample Appraisal Cards

COUNTY OF MONTGOMERY, VIRGINIA
RFP # 25-08

ISSUE DATE: MARCH 13, 2025
 General Reassessment Services

(TO BE COMPLETED AND RETURNED)
GENERAL INFORMATION FORM

QUESTIONS: All inquiries for information regarding this solicitation should be directed to: Jeff Groseclose, CPPB, VCO, VCA, Procurement Manager, Phone: (540) 382-5784; faxed to (540) 382-5783, or email: mcpurchasing@montgomerycountyva.gov.

DUE DATE: Sealed Proposals will be received until **April 16, 2025** up to and including **3:00PM**. Failure to submit proposals to the correct location by the designated date and hour will result in disqualification.

ADDRESS: Proposals should be mailed or hand delivered to: **Montgomery County Purchasing Department, 755 Roanoke Street, Suite 2C, Christiansburg, Virginia 24073-3179**. Reference the Due Date and Hour, and RFP number in the lower left corner of the return envelope or package.

COMPANY INFORMATION/SIGNATURE: In compliance with this Request for Proposal and to all conditions imposed herein and hereby incorporated by reference, the undersigned offers and agrees to furnish the services and goods in accordance with the attached signed proposal or as mutually agreed upon by subsequent negotiation.

Full Legal Name (print)		Federal Taxpayer Number (ID#)	Contractor's Registration N/A
Business Name / DBA Name / TA Name and Address		Payment Address	Purchase Order Address
Contact Name/Title		Signature (ink)	Date
Telephone Number	Fax Number	Toll Free Number	E-mail Address

COUNTY OF MONTGOMERY
RFP# 25-08
 General Reassessment Services

I. PURPOSE: The intent and purpose of this Request for Proposal (RFP) is to establish a contract with through competitive negotiation with a professional appraisal firm to complete a general reassessment of real estate in the County of Montgomery County, Virginia herein after referred to as “County.”

II. BACKGROUND:

A. General Background: Montgomery County is located in the southwestern part of Virginia in the region known as the New River Valley. This region takes its name from the New River, the nation's oldest and the world's second oldest river, and includes the counties of Floyd, Giles, Montgomery, Pulaski, and the City of Radford. The County has a land area of approximately 395 square miles and lies in the broad picturesque area between the Appalachian Plateau and the Blue Ridge Mountains. Topography varies from gently rolling to steep mountainous terrain, with elevations varying from 1,300 to 3,700 feet above sea level. The majority of the County is at an elevation of 2,000 feet.

Today the Towns of [Blacksburg](#) and [Christiansburg](#), the County seat, are the population centers of the County and are located approximately 35 miles southwest of the City of Roanoke. Blacksburg is home to [Virginia Polytechnic Institute and State University](#) (Virginia Tech). Founded in 1872 as a land-grant college, Virginia Tech is the second largest public university in Virginia and one of the country's leading research institutions. The County had a 2020 population of 100,839. (This includes two incorporated towns, Blacksburg and Christiansburg, with a combined population of approximately 67,365.)

The County is governed by an elected seven member Board of Supervisors that appoints a County Administrator.

B. Specific Background: Montgomery County is approximately 395 square miles. It has approximately 40,444 real estate parcels including approximately 1,727 non-taxable parcels. The last general assessment began in 2021, and was effective January 1, 2023. The Commissioner of the Revenue is Brenda H. Winkle. The current total value of taxable real estate is over \$12.4 billion. General property tax collections amounted to \$78.4 million in FY23 and \$83.4 million in FY24.

C. Properties: The County contains the following number of properties as of January 1, 2025.

1. Residential total	33,003
2. Commercial and Industrial total	2,729
Agricultural 20 ac+	2,225
Multi-Family	712
Minerals	48
Tax Exempt Real Property	1,727
Approximate # of mobile homes	3,287
TOTAL	43,731

D. Technical Information: The County uses Tyler Technologies automated mass appraisal system, known as IASWorld for their Integrated Assessment System (IAS).

III. STATEMENT OF NEED: The County desires the services of a Contractor that can provide a complete reassessment of all property within Montgomery County, Virginia, and the classification of all real property in accordance with State requirements, excluding public service properties. Values shall be at one hundred percent (100%) of fair market value as required by the laws of the Commonwealth of Virginia.

Offerors are being requested to provide line item pricing, breaking down and defining each component/item. The Contractor must be able to use the County software - IASWorld. The County will provide computer hardware, access to the County's software, and office space. Offerors are requested to include a per parcel rate to be used for invoicing purposes if the Contractor completes more or less parcels than listed in the above total. Offerors are requested to include a "not to exceed" price to complete all work for this project.

A. CONTRACTOR REQUIREMENTS:

1. Tasks: The Contractor, as a minimum, will be responsible for the following requirements. Each Offeror is requested to submit their proposal methodology, operational plan, and pricing, outlining how each of the following requirements will be met. Offerors are requested to include their definitions for each of these components.

- a) Project Planning.
- b) Neighborhood identification as defined by IASWorld. This includes, but is not limited to, the following tasks:
 1. Review/update neighborhood pricing tables.
 2. Update Neighborhood and Land Models in IASWorld
- c) Perform Market/Sales Data Analysis.
- d) Calibrate Cost and Depreciation Tables.
- e) Field Work/Data Collections.
 1. On Site Visits to all properties is required to for the collection of field data of all residential, commercial properties, and manufactured homes, taxable and nontaxable.
 2. Photos taken of each parcel, including manufactured homes.
 3. Data entry of all missing fields and update information in IASWorld, including any missing sketches, additions, out buildings, decks, etc.
 4. General values and perform statistical analysis.
- f) Evaluation Review & Proofing.
- g) Monthly Status Reports for County.
- h) Preliminary Evaluation.
- i) Miscellaneous Project Completion.
- j) Informal Assessor Hearings.
- k) Administrative support for formal Hearings with Board of Equalization. The County prefers the same staff that will work on the reassessment.

2. Schedule/Time frame: Offerors are to state their proposal schedule for completing the tasks as outlined above. The entire reassessment process must be completed by December 31, 2026. All

fieldwork and preliminary appeals must be completed and complete reassessed values must be to the Board of Equalization (BOE) upon their appointment in January 2027. Payment will be denied for all parcels without a final assessment as of December 31, 2026. The 5% retainer will be withheld if all work is not finished by December 31, 2026.

3. **Median Level:** Of utmost importance in this contract is the quality of work performed by the Contractor and to that end, this contract will be deemed acceptable provided the coefficient of dispersion about the median does not exceed 20% for commercial property, 10% for residential property and the median level of assessment is greater than 90% after a sales ratio study has been conducted. A 95% + median level is preferred. Offerors are to submit a proposed timeline for meeting this requirement and suggested consequences if it is not met. Provide the final date new parcels and new construction will be evaluated by the Contractor.
4. **Delays:** The Contractor will not be held responsible for any delays resulting from hardware or software failures caused by the County.
5. **Neighborhood Grouping:** The Contractor will review the neighborhood codes assigned to each property to assure proper grouping and assign neighborhood codes to properties missing a code. A neighborhood is defined as the environment of a subject property that has a direct and immediate effect on value and the properties share important economic characteristics. A single economic neighborhood may include more than one physical area. All areas of the County are delineated into neighborhoods for the purpose of analysis.
6. **Sales Data:** The Contractor will complete a comprehensive sales analysis prior to the appraisal of any real property in the County. This analysis will contain sufficient number and variety of valid real estate transactions to establish a basis of comparability. Pertinent information regarding these transactions will be recorded in a format agreed upon by the contractor and the County, and the results will be presented to the County as agreed upon in their Contractor's proposed time frame as accepted by the County. This sales analysis will be available for public inspection and shall become the property of Montgomery County at the completion of the reassessment. This work will be done in Phase I of this contract and will be ongoing to include valid sales up to September 2026.
7. **Sales and Feature Tables:** The reassessment will be conducted using the County's computerized property valuation system. The County uses Tyler Technologies IASWorld software as their Integrated Assessment System (IAS). The Integrated Assessment System (IAS) will be used as designed. The IAS program value over rides will not be allowed. The Contractor will be required to become sufficiently familiar with this system in order to update the system's various sales and features tables and to establish assessed value from factors within the computer database.
8. **Appraisal Cards:** The County will provide digital/PDF field appraisal cards from IASWorld. The cards will be provided at the beginning of the project and all appraisals will be recorded using these cards. Samples of these cards are included in this RFP as Attachment D. The cards shall show factors upon which value is based, such as, construction, age, size; condition, depreciation, of each building or structure. The cards may also contain an outline or sketch of all major building improvements and will also display pricing data for each building along with the owner's name, address, legal description and map number. Some data required by the IAS system may not be

included on the cards. The Contractor will be required to gather this data as part of their fieldwork. Clerical staff, under the supervision of the contractor, will be responsible for updating the County's assessment data files, and new values will be generated solely from the computerized assessment system. County reserves the right to periodically check Contractor's work for accuracy and conformance with County's requirements.

9. **Mobile Homes:** The County will provide digital/PDF field record cards for all mobile homes assessed in the County. **The contractor shall conduct a field inspection of all mobile homes to verify the make, size, condition, model; year of manufacture, owner and location of mobile homes.** The location shall be identified by tax map number and/or site address. Mobile homes must be appraised by the contractor. The Contractor shall provide the County with a monthly report indicating those mobile homes that are not found. The Contractor shall also generate a new field appraisal card showing the make, size, condition, estimated model year of manufacture, owner, site address, tax map number of any mobile homes found by the Contractor that have not been placed on record by the County at the time of the contractor's field inspection. Copies of these new field appraisal cards shall also be provided to the County on a monthly basis.
10. **Residential Properties:** **The Contractor shall make a physical field inspection on all residential properties.** The contractor shall complete an exterior inspection of each residence. The inspector will confirm, correct, or gather information to complete all information requested on the IAS field appraisal cards, including the exterior dimensions which produce the sketch. The Contractor will observe and adjust for such factors as exterior condition, physical depreciation, functional and economic obsolescence, and general quality of construction. All information so gathered shall be recorded on the field appraisal cards.
11. **Rural Properties:** **Suburban and farm dwellings shall be visited and inspected in the same manner as other residential buildings.** The Contractor will confirm, correct, or gather information to complete all fields on the IAS field appraisal cards, including the exterior dimensions which produce the sketch. All farm buildings and structures will be noted as additional features on the card, and these improvements shall be appraised at their fair market value. Farms that exceed four (4) structures shall require a plot plan and multiple cards.
12. **Commercial Properties:** **Commercial properties shall be visited and inspected in the same manner as residential properties.** The Contractor will confirm, correct or gather information to complete all fields on the IAS field appraisal cards. To the extent that such information is available replacement cost, less any physical depreciation, functional or economic obsolescence; income and expense data; and market data will be used in combination to assist in appraising with the property. The Contractor shall review and update the improvement name as it appears on the Commercial Building Screen in IASWorld (screen CA31).
13. **Apartments:** All apartments of four or more connected dwelling units designed or redesigned for rental occupancy and all groups of apartment buildings are to be classified as apartment property. The appraisal of apartments is to be complete with analysis of income and expense data, if such data is obtainable. The income approach to value must be considered in apartment appraisals, and where actual rents are not available, economic rental estimates will be used. The inspector will confirm, correct or gather all information necessary for the IAS system.

14. **Industrial Properties:** The Contractor shall make a physical field inspection on all **Industrial Properties**. Small industrial plants shall be appraised in the same manner as other commercial properties. All yard improvements shall be listed individually and a sketch 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 approaches to value shall be utilized if applicable. The Contractor will confirm, correct or gather all information necessary for the IAS system.
15. **Tax Exempt Properties:** Tax Exempt properties shall be visited and inspected in the same manner as residential and commercial properties. The Contractor will confirm, correct or gather information to complete all fields on the IAS field appraisal cards. To the extent that such information is available replacement cost, less any physical depreciation, functional or economic obsolescence; will be used in combination to assist in appraising tax exempt properties
16. **Condominiums:** Condominiums shall be visited and inspected in the same manner as residential and commercial properties. The Contractor will confirm, correct or gather information to complete all fields on the IAS field appraisal card. The value for Common Area elements will be entered under “other building and yard improvements” on the CA24 screen using the CAE code, rather than as a land value.
17. **Mineral Rights and Mineral Lands:** The Contractor will confirm, correct or gather information to complete all fields on the IAS field appraisal card.
18. **Cell Towers:** Cell towers shall be appraised at market value in the same manner as Commercial properties using acceptable appraisal standards. The County will provide the contractor with a listing of cell towers that differentiate between those towers assessed locally and those towers assessed by the SCC.
19. **New Construction/Property Splits/Boundary Adjustments:** The Contractor shall coordinate efforts with the County Assessor in appraising new construction, additions, property splits, and boundary line adjustments. Every reasonable effort will be made to ensure that this function is not duplicated by the firm or by the jurisdiction or omitted by both. The proposal shall include an estimated deadline for completion of these adjustments by the Contractor.
20. **Notification:** Residents will be notified, either in person or by printed material left on the property when their dwelling/property is inspected by an appraiser. Printed material must indicate a contact person’s name with a listed phone number indicating where to reach the appraiser.
21. **Contractor Qualifications and Personnel:** The County shall have the right to review and approve all personnel involved in the appraisal of real property in Montgomery County. It should be noted that all appraisers serve at the discretion of Montgomery County and the terms of the final contract between the contractor and the County of Montgomery shall clearly empower the County to remove unsatisfactory appraisers from the project. The Contractor shall meet qualifications and criteria established for such work by the Commonwealth of Virginia.
 - a) The Contractor must employ a sufficient number of qualified and experienced employees, at all times, to perform the work expeditiously on a timely and controlled basis. Complete

instruction and direction of all members of the personnel connected with the reassessment shall be supplied by the Contractor. (Offerors are requested to include in their proposal the names and qualifications of individuals who will be working on this project).

- b) The Contractor shall make personnel available on-site during normal working hours in the office provided by the County.
- c) No employee of the Contractor is to be deemed an employee or agent of the County and is not entitled to any benefits from the County. The Project Manager in charge of this appraisal program and other key personnel shall not be transferred away from the County and the work to be performed under this contract, or shifted, or replaced, without the written consent of the County having been first obtained. The County has the right to approve or reject all personnel working on the project.
- d) All field personnel shall display a personal identification badge that shall include name, photograph, company name, County name and employee's title and signature.
- e) All field personnel shall be employees of the Contractor. The County Assessor, including any assistants, will work closely with the Contractor's employees.
- f) The Contractor's appraisal personnel responsible for final values should preferably have a minimum of three (3) years of experience in providing services similar to County requirements. Other field personnel not responsible for actual values, may be employed at the discretion of the contractor, without the 3 year experience requirement. The Contractor shall provide the name, title, address, email address and telephone/facsimile number of the primary contact for our account if awarded the contract.
- g) The Contractor must be licensed by the Virginia Department of Professional and Occupational Regulation (DPOR) to perform appraisal and reassessment services as required by the applicable rules, regulations, and laws of the Commonwealth of Virginia, as amended. The Contractor must hold a current certification from the Virginia Department of Taxation ("Virginia Tax") for Contracted Virginia Real Estate Assessment Professionals per the Code of Virginia, as amended. The Certification Criteria effective January 1, 2025 is included in this RFP as Attachment C.

22. **Laws to be Observed:** The Contractor is assumed to be familiar with all Federal, State and local laws, codes, ordinances and regulations which in any matter affect those engaged or employed in the work or in any way affect the conduct of work. No plea of understanding or ignorance on the part of the Contractor will in any way serve to modify the provisions of the contract.

The Contractor shall at all times observe and comply with all Federal, State, and local laws, orders, codes, ordinances and regulations in any manner affecting the conduct of the work and the Contractor shall indemnify and save harmless the County, its officers, agents and servants against any claim or liability arising from or based on the violation of any such law, ordinance, regulation, order of decree, whether by Contractor or its employees, or anyone acting in the Contractor's behalf.

23. **Vehicle Identification:** All vehicles used by the personnel of the Contractor in performance of duties herein described shall be identifiable by signs located on each side of said vehicle, which signs shall meet the following requirements:

- a) Letters at least 2" tall
- b) Contain words "County Reassessment"
- c) Variations only as directed by the County

The Contractor shall submit a listing of all regularly used vehicles, driver's name, description and vehicle tag number to the Montgomery County Sheriff's Office, The Blacksburg Police Department and the Christiansburg Police Department at the beginning of the job. Vehicles shall be provided by Contractor.

24. **Public Relations:** The Contractor and its employees shall endeavor to promote friendly relations with taxpayers and the general public. Any news releases, media interviews, brochures and other publicity or public information must be approved by or issued by the County.

25. **Public Input: Pursuant to the requirements of Section 58.1-3330 of the Code of Virginia, 1950, as amended,** all property owners in Montgomery County shall be notified of changes in assessed values of their property. Following this notification, the appointed Contractor shall hold informal hearings to meet with property owners in order to explain, discuss and hear appeals concerning values established. An ample number of hearing days shall be allotted by the Contractor to handle the entire number of appeals filed by property owners and include a minimum of fifteen-days (15) days following the mailing of notices of the change in assessed value. Property owners shall be able to file their appeals of their assessments via phone call, letter, in person, or electronically. The Contractor shall keep a log/spreadsheet of all appeals received indicating property owner, date of appeal, method of appeal and disposition of appeal. The Contractor shall respond to all appeals received, postmarked, or time stamped within the allotted fifteen-days (15) days or additional time if warranted due to a heavy volume of appeals. It is the intent of the County that all appellants shall receive an informal hearing prior to an appeal to the Board of Equalization. A minimum of fifteen (15) minutes shall be allotted by the Contractor for each appeal according to the number and type of properties they are appealing. An ample number of qualified assessors shall be on-site to hear appeals. Hearing dates and times shall be varied during the appeal period. A minimum of two (2) weekdays shall include night hours until 7 p.m. and at least two (2) Saturdays shall be provided for appeals of at least four (4) hours each. The Contractor shall ensure that assessors hearing appeals endeavor to explain and demonstrate to each appealing property owner how they arrived at the changes in assessed values. The Contractor shall use sales studies, aerial photography, sales of comparable properties among other things to demonstrate how the appealed assessed value was reached. Appealing property owners shall be advised when to expect a notice from the assessor(s) of any changes or no changes to assessed values due to the filed appeal.

Following such meetings with property owners, the Contractor shall make any necessary field reviews of disputed properties and shall make any appropriate adjustments in value. Notices of any changes/no changes in assessed values as a result of the filed appeals shall be mailed to the property owners before December 15, 2026.

26. Board of Equalization:

Following the general reassessment, the County is required by law to appoint a Board of Equalization (BOE). The BOE shall establish meeting dates, times and places, to receive feedback and questions from property owners regarding appraised values. The Project Manager or representative will be available as needed for consultations and questions resulting from the meetings of the BOE and all informal hearings following the completion of the work until all questions/appeals are heard and disposed of, to assist in the settlement of complaints and to defend the values placed upon the various properties. These services shall be provided at no additional cost to the County in the case of complaints as to assessed valuations. The County prefers the

same Project Manager/representatives that will work on the reassessment.

27. **Printing:** Except as previously noted, the Contractor shall be responsible for the printing cost associated with the reappraisal project. Printing shall include notices of value and other required forms. Public information pamphlets, if done, are the County's responsibility. It shall be the joint responsibility of the County and the Contractor to design these items. The County shall have all final approval on all materials sent to County residents

28. **Valuation Methodology:**

A. Valuation General

The contractor shall compute to the nearest one-hundred dollars (\$100) the value of all properties identified in these specifications.

A minimum of two approaches to value from the following three: market, cost or income, must be employed for all income-producing property. Income-producing property includes, but is not necessarily limited to, the following types: primarily commercial multiple-use properties; apartments over eight units; hotels and motels; storage, warehouse and distribution facilities; discount and department stores; shopping centers and malls; supermarkets; small retail properties; office buildings; medical office buildings; research and development facilities; and properties within industrial parks.

All valuation testing must be reviewed and approved by the assessors before the commencement of valuation production.

The requirements for each of the three major approaches to value, land valuation and personal property valuation are outlined in the following:

1. Residential Property

a) Comparable Sales

The contractor shall employ a comparable sales valuation approach. The contractor's analysis of the factors used to select comparable sales shall be provided to the assessor for their review prior to valuation.

b) Cost Approach

The contractor shall analyze local building costs and trends and shall revise the replacement cost pricing schedules to be used in determining the valuation of appropriate properties.

Subsequent to the selection of replacement cost pricing schedules and the establishment of land values, the contractor shall analyze the sales of improved properties in order to derive an estimate of physical and functional depreciation and economic obsolescence.

After this analysis, depreciation tables, based upon the condition, desirability, and usefulness of a building relative to its actual age, shall be revised as

necessary. After approval by the assessors, these tables shall be used to estimate the depreciation of comparable subject properties.

2. Commercial/Industrial Property

a) Cost Approach

The contractor shall analyze local building costs and trends and shall revise the replacement cost pricing schedules to be used in determining the value of appropriate properties.

Subsequent to the selection of replacement cost pricing schedules and the establishment of land values, the contractor shall analyze the sales of improved properties in order to derive an estimate of physical and functional depreciation and economic obsolescence.

After this analysis, depreciation tables, based upon the condition, desirability, and usefulness of a building relative to its actual age, shall be revised as necessary. After approval by the assessors, these tables shall be used to estimate the depreciation of subject properties.

b) Income Approach

The contractor shall review and analyze current income and expense information furnished by parcel owners, prepared as a result of property owner interviews or obtained from third party sources, giving due consideration to factors affecting the valuation of income-producing properties. A report containing documentation to support the development and derivation of rent schedules, expense ratios and capitalization rates shall be submitted to the assessors for review prior to the commencement of valuation field review activities. The Contractor will be responsible for mailing requests for income data.

A value determined by any of the accepted methods for the income approach to valuation shall be made for each income-producing property.

c) Comparable Sales

The contractor shall employ a comparable sales valuation approach. The contractor's analysis of the factors used to select comparable sales shall be provided to the assessors for their review prior to valuation.

d) Land Valuation

The contractor shall analyze recent sales of comparable properties either within the County, or within an agreed upon area of the state, and/or land residuals if there are insufficient sales. The contractor shall evaluate all factors affecting the market value of lots and parcels including the quality of the neighborhoods, zoning restrictions, size, frontage, depth, shape,

topography and all other factors considered relevant in the establishment of land values.

Based on this analysis, the contractor shall develop appropriate land base unit values and shall establish land valuations for each parcel of real property within the scope of these specifications

29. **Postage:** The Contractor will be responsible for the mailing of the notices of change in assessed value after said notices are prepared, including postage costs.

B. COUNTY REQUIREMENTS: The County will provide with the following:

1. **Office Space:** Offerors are requested to submit a recommendation as to their estimated requirements for office arrangements. The County will be responsible for providing the agreed upon office arrangements. The County will furnish all necessary utilities such as power, water, heat, air conditioning, computer hardware and local telephone service.
2. **Computer Workstations:** Offerors are requested to submit a recommendation as to their requirements for computer workstations. The County will be responsible for providing the agreed upon computer workstations. A workstation will be provided for clerical staff.
3. **Forms and appraisal cards:** The County will provide the Contractor with appraisal cards and data collection forms as described above.
4. **Tax Maps:** A complete set of digital/PDF tax maps for use by the contractor and access to map updates and property records.
5. **Pictometry, Topography, Flood Plain Maps:** Access to these can be provided by the County. Pictometry is detailed oblique 3-D aerial photography that shows buildings, land, etc. from multiple sides at a one foot minimum resolution. Measurements including height, length, and width can be taken directly from the Pictometry but shall not be used to replace an on-site field inspection.
6. **Training:** The County may provide training for Tyler Technologies IASWorld, the IAS system used by the County.

C. TERMINATION OF CONTRACT: The contract may be terminated by the County for the following reasons:

1. Failure of the Contractor to start the work on the date specified.
2. Reasonable evidence that the progress being made by the Contractor is insufficient to complete the work within the specified time at the sole discretion of the County.
3. Failure on the part of the Contractor to comply with any requirement of the contract.

Before the contract may be terminated, the Contractor and its surety must be notified in writing by the County of the conditions which make termination of the contract imminent. Ten (10) days after

this notice is given, if a satisfactory effort has not been made by the Contractor or its surety to correct the condition, the County may declare the contract terminated, notify the Contractor and its surety accordingly, and pursue any right and remedy under the contract and bond (s).

In the event the contract is terminated, the County reserves the right to take possession of all completed work, work in progress, material, software, documentation, or any other part of the work, to account for said work and material and to use the same to complete the project in accordance with the contract specifications and the provisions and conditions of the bond (s) attached to the contract.

IV. PROPOSAL PREPARATION AND SUBMISSION REQUIREMENTS:

A. GENERAL REQUIREMENTS:

1. RFP Response: In order to be considered for selection, Offerors must submit a complete response to this RFP to include:

a. **One (1) original and four (4) paper copies of the entire proposal INCLUSIVE OF ALL ATTACHMENTS.** Any proprietary information should be clearly marked.

b. **One (1) electronic copy** in WORD format or searchable PDF (USB/Flash Drive) of the entire proposal as one document, **INCLUSIVE OF ALL ATTACHMENTS** mailed along with the hard copy above. Any proprietary information should be clearly marked.

c. Should the proposal contain **proprietary information**, provide:

i. **One (1) redacted paper copy** of the entire proposal inclusive of all attachments. **All identified proprietary information should be blacked out.** This copy should be marked **“Redacted Copy”**

ii. **One (1) redacted** electronic copy in WORD format or searchable PDF (USB/Flash Drive) of the entire document **INCLUSIVE OF ALL ATTACHMENTS.** **All identified proprietary information should be blacked out.** This USB/Flash Drive should be marked **“Redacted Copy”**.

d. Response shall be submitted to:

Jeff Groseclose, CPPB, Procurement Manager
Montgomery County Purchasing Department
755 Roanoke Street, Suite 2C
Christiansburg, VA 24073

Identify on outside of envelope: **Sealed RFP # 25-08**

RFP due date and hour: **April 16, 2025, 3:00 P.M.**

- e. Offerors may choose to submit required electronic copies through the eVA Electronic Submission process by the date and time identified herein. Offerors must still submit required paper copies described above. In order to submit an electronic proposal, the offeror **must be properly registered with eVA**. Registration may be accomplished through this site: <https://eva.virginia.gov/register-now.html>. It is strongly encouraged that registration be completed well in advance of the submission deadline to avoid any delays in the process. Montgomery County will not be able to assist offerors with their submissions. Offerors must contact eVA with any questions or needs for assistance with submission. Upon successful submission, the offeror should receive confirmation of the submission through eVA. The County will not confirm receipt of the proposal. For a tutorial on how to view and respond to a solicitation, visit: <https://www.youtube.com/watch?v=KSxcAkOekW0>. Montgomery County is not responsible for delays, miscommunications, or transmission errors that may occur during the electronic submission process. This includes, but is not limited to issues related to internet connectivity, email servers, or other technical malfunctions. It is the sole responsibility of the Offeror to ensure the proposal is submitted on time.

The Offeror shall make no other distribution of the proposal.

2. Proposal Preparations:

- a. Proposal shall be signed by an authorized representative of the Offeror. All information requested should be submitted. The Procurement Manger will review all proposals to ensure required information is included. Failure to submit all information requested may result in a request to submit the missing information. Proposals which are substantially incomplete or lack key information may be rejected as incomplete. Mandatory requirements are those required by law or regulation or are such that they cannot be waived and are not subject to negotiation.
- b. Proposals will be reviewed and evaluated by a Committee as designated by the County.
- c. Proposal should be prepared simply and economically, providing a straight forward, concise description of capabilities to satisfy the requirements of the RFP. Emphasis should be placed on completeness and clarity of content.
- d. Proposals should be organized in the order in which the requirements are presented in the RFP. All pages of the proposal should be numbered. Each paragraph in the proposal should reference the paragraph number of the corresponding section of the RFP. It is also helpful to cite the paragraph number, subletter, and repeat the text of the requirements as it appears in the RFP. If a response covers more than one page. the proposal should contain a table of contents which cross references the RFP requirements. Information which the offeror desires to present that does not fall within any of the requirements of the RFP should be inserted at an appropriate place or be attached at the end of the proposal and designated as additional material. Proposals that are not organized in this manner risk elimination from consideration if the evaluators are unable to find where the RFP requirements are specifically addressed.

- e. Each copy of the proposal should be bound or contained in a single volume where practical. All documentation submitted with the proposal should be contained in that single volume.
- f. Ownership of all data, materials and documentation originated and prepared for the County pursuant to the RFP shall belong exclusively to the County and 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 2.2-4342D of the Code of Virginia, in writing, either before or at the time the data or other 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, line item prices and/or total proposal prices as proprietary or trade secrets is not acceptable and will result in rejection of the proposal.

B. SPECIFIC REQUIREMENTS: Proposals should be as thorough and as detailed as possible so that the County may properly evaluate your capabilities to provide the required services. Offerors are required to submit the following information/items as a complete proposal:

1. The return of the RFP general information form and addenda, if any, signed and completed as required.
2. **Client References:** Offerors must provide at least three governmental client references in which work completed is comparable to the requirements contained in this RFP. Submit a Client Reference to include name of entity where services were performed, name of contact person and valid phone number of the contact. Also include exit ratios, percentage of hearings and percentage of appeals to BOE. Offerors shall provide a complete list of ALL general reassessment services they have completed within the past five years. This information is to include the agreed upon contract price for each public body and the number of parcels that were appraised.
3. **Method and Plan:** Offeror's shall submit a method and plan outlining:
 - a. How the requirements contained in this proposal will be met. This is the Offeror's proposed plan.
 - b. The Offeror's proposed methodology for meeting the requirements of this RFP.
 - c. Itemized list with prices of all services to be provided.
 - d. Approximate date work will begin and end.
 - e. The qualifications, experience, and background of the personnel to be used to complete the requirements of this contract.
 - f. The hiring of local clerical staff to carry over to the BOE. The County prefers the same staff that will work on the reassessment.
4. **Offeror's Experience and Work Load:** The County is requesting that Offerors include with the proposal a complete list of all contracts awarded during the past five years. The information must include the amount of the contract award and the actual amount paid

elaborating on the reason for the difference. Sales ratio study information shall be provided for each job. The County is requesting this information to determine how complete Contractors are in providing pricing information for a proposal and how that pricing information relates to actual expenses paid. The County will not allow unwarranted contract modifications or purchase order changes for items that should have been addressed prior to awarding a contract. Offeror shall also describe their experience with using Tyler Technologies IASWorld Integrated Assessment System. This information will be evaluated and could have an impact on the award decision.

5. **Key Personnel:** The proposal shall include a description of key personnel to be assigned to the project, their past experience, current certifications, and availability. Proposers should submit with the proposal a resume of each of the Proposer's key personnel to be assigned to the County to provide the required services.
6. **Pricing:** Offerors are requested to provide pricing on a per parcel basis. Offerors must convey to the County how the county will be invoiced if the number of parcels appraised exceed the number originally quoted in the RFP. Offerors must also convey to the County how the County will be credited if the number of parcels appraised are less than the number originally quoted in the RFP.
7. **Sample of Notice of Change in Assessed Value:** Offerors should include a sample of document/letter that will be used for notices of change in assessed value
8. **Additional Information:** Offeror may submit other information believed to pertinent for consideration.
9. **Exceptions:** Any and all deviations from, or exceptions to, the specifications and requirements herein must be listed and prominently displayed in proposal materials and should be clearly stated by the offeror in a separate section titled "Exceptions".

V. EVALUATION AND AWARD OF CONTRACT:

A. Award of Contract: Selection shall be made of two or more offerors deemed to be fully qualified and best suited among those submitting proposals on the basis of the evaluation factors included in the Request for Proposal, including price, if so stated in the Request for proposal. Negotiations shall be conducted with the offerors so selected. Price shall be considered, but need not be the sole determining factor. After negotiations have been conducted with each offeror so selected, Montgomery County shall select the offeror which, in its opinion, has made the best proposal, and shall award the contract tot that offeror. Montgomery County may cancel the Request for Proposal or reject proposals at any time prior to an award, and is not required to furnish a statement of the reason why a particular proposal was not deemed to be the most advantageous. (Section 2.2-4359D, Code of Virginia.) Should Montgomery County determine in writing and in its sole discretion that only one offeror is fully qualified, or that one offeror is clearly more highly qualified than the others under consideration, a contract may be negotiated and awarded to that offeror. The award document will be a contract incorporating by reference all the requirements, terms, and conditions of the solicitation and the contractor's proposal as negotiated. See Attachment B for sample contract form.

B. Evaluation Criteria: Proposals shall be evaluated by the County using the following criteria:

<u>EVALUATION CRITERIA</u>	<u>WEIGHT</u>
1. Methodology for completing the reassessment	25
2. Operating plan including staffing, timeframe, Quality control, use of technology, oversight public relations in providing a solution to meet the County’s requirements	25
3. Qualifications and Relevant Experience	25
4. Price	15
5. References	10

VI. PRICE SCHEDULE: Offerors are requested to provide pricing per item listed in itemized pricing, including all tasks identified in Section III.A and Section IV.B.5.

VII. PREPROPOSAL CONFERENCE: An optional pre-proposal conference will be held at **2:00 pm, Wednesday, April 2, 2025** at the Montgomery County Government Center at 755 Roanoke Street, Christiansburg, VA 24073 in **Multipurpose Room #2**. The purpose of this conference is to allow potential Offerors an opportunity to present questions and obtain clarification relative to any facet of this solicitation. Potential offerors may also attend by teleconference.

Email mcpurchasing@montgomerycountyva.gov **no later than 5:00 pm on April 1, 2025** to pre-register for the conference and to receive instructions for attending in person or by teleconference. If you do not pre-register by this deadline, there is no guarantee you will receive instructions prior to the meeting to attend via teleconference.

While attendance at this conference will not be a prerequisite to submitting a proposal, offerors who intend to submit a proposal are encouraged to attend. Bring/have a copy of this solicitation with you during the conference. Any changes resulting from this conference will be issued in a written addendum to this solicitation.

Potential offerors are encouraged to submit written questions before the conference so questions may be addressed during the meeting. Written questions must be submitted by email to Jeff Groseclose at mcpurchasing@montgomerycountyva.gov no later than close of business on **March 31, 2025**.

VIII. RESERVATION OF RIGHTS: Montgomery County reserves the right to award in part or in whole, to one or more vendors, or to reject any or all proposals, whichever is deemed to be in its best interest.

IX. CONTRACT ADMINISTRATION:

The Montgomery County Chief Financial Officer, or their designee, shall be identified as the Contract Administrator and shall use all powers under the contract to enforce its faithful performance. The Contract Administrator, or their designee, shall determine the amount, quantity, acceptability, fitness of all aspects of the services and shall decide all other questions in connection with the services. The Contract Administrator, or their designee, shall not have the authority to approve changes in the services which alter the concept or which call for an extension of time for this contract. Any modifications made must be authorized by the Montgomery County Purchasing Department through a written amendment to the contract.

X. PAYMENT PROCEDURES:

1. **Proposed method of payment:** Offerors are requested to submit their recommendation as to how they are to be paid.
2. **Retainer: a 5% retainer will be withheld from each invoice.** A final payment of the retainer will be made to the Contractor after final acceptance of all work.
3. The County will authorize payment to the Contractor after receipt of Contractor's correct invoice for services rendered. Invoices shall be sent to:

Montgomery County
Attn: Chief Financial Officer
755 Roanoke Street, Suite 2E
Christiansburg, VA 24073

4. **Deliverables:** All documents, reports, records, data or other materials, in whatever form, manual or mechanized, obtained or produced during the performance of this project shall be the sole property of the County and shall be delivered during an appropriate phase of or at the conclusion of the project, as set forth in these specifications or by the assessor. The documents, reports, records, data and other materials shall include, without limitation, the specific deliverable products listed below:
 - 1) A property inventory record for each parcel and account,
 - 2) Any sales ratio studies developed during the project,
 - 3) A detailed cost manual,
 - 4) The depreciation schedule and source of information used for its development,
 - 5) All materials and documentation used on the land valuation effort,
 - 6) Income and expense statements in bound volumes for real property parcels utilizing the income approach, where applicable,
 - 7) Field review documents which reflect original proposed value, adjusted proposed value, and any notes relative to action taken from public disclosure activities,
 - 8) All manual and computerized reports which support values and valuation formulas,
 - 9) Documentation of all procedures used throughout the project.

XI. CONTRACT PERIOD: The initial term of this contract is for the completion of the services required by the contract. General Reassessment Services are anticipated to begin July 1, 2025 and be completed by December 31, 2026. Montgomery County reserves the right to renew for one additional assessment period, or as negotiated.

ATTACHMENT A TERMS AND CONDITIONS

GENERAL TERMS AND CONDITIONS

RFP General Terms and Conditions can be found by clicking on the link below:

<https://montgomerycountyvva.gov/1/departments-services/purchasing>

SPECIAL TERMS AND CONDITIONS

1. **ADVERTISING:** In the event a contract is awarded for supplies, equipment, or services resulting from this solicitation, no indication of such sales or services to Montgomery County will be used in product literature or advertising. The Contractor shall not state in any of the advertising or product literature that the Commonwealth of Virginia or any agency or institution of the Commonwealth has purchased or uses its products or services.
2. **AUDIT:** The Contractor hereby agrees to retain all books, records, and other documents relative to this contract for five (5) years after final payment, or until audited by the Commonwealth of Virginia, whichever is sooner. Montgomery County, its authorized agents, and/or State auditors shall have full access to and the right to examine any of said materials during said period.
3. **PERFORMANCE AND PAYMENT BONDS:** The successful Offeror shall deliver to the Montgomery County Purchasing Department executed Commonwealth of Virginia Standard Performance and Labor and Material Payment Bonds, each in the sum of the contract amount, with Montgomery County as obligee. The surety shall be a surety company or companies approved by the State Corporation Commission to transact business in the Commonwealth of Virginia. No payment shall be due and payable to the Contractor, even if the contract has been performed in whole or in part, until the bonds have been delivered to and approved by the Montgomery County Purchasing Department. Standard bond forms will be provided by the Montgomery County Purchasing Department prior to or at the time of award.
4. **CANCELLATION OF CONTRACT:** Montgomery County reserves the right to cancel and terminate any resulting contract, in part or in whole, without penalty, upon 60 days written notice to the Contractor. In the event the initial contract period is for more than 12 months, the resulting contract may be terminated by either party, without penalty, after the initial 12 months of the contract period upon 60 days written notice to the other party. Any contract cancellation notice shall not relieve the Contractor of the obligation to deliver and/or perform on all outstanding orders issued prior to the effective date of cancellation.
5. **IDENTIFICATION OF PROPOSAL ENVELOPE:** The signed proposal should be returned in a separate envelope or package, sealed and addressed as follows:
Montgomery County
Purchasing Department
755 Roanoke Street, Suite 2C
Christiansburg, VA 24073-3179
Reference the opening date and hour, and RFP Number in the lower left corner of the envelope or package.

If a proposal not contained in the special envelope is mailed, the Offeror takes the risk that the envelope, even if marked as described above, may be inadvertently opened and the information compromised which may cause the proposal to be disqualified. No other correspondence or other proposals should be placed in the envelope. Proposals may be hand delivered to the Montgomery County Purchasing Department.

6. **INDEPENDENT CONTRACTOR:** The contractor shall not be an employee of Montgomery County, but shall be an independent contractor.

Nothing in this agreement shall be construed as authority for the contractor to make commitments which shall bind Montgomery County, or to otherwise act on behalf of Montgomery County, except as Montgomery County may expressly authorize in writing.

7. **INSURANCE:**

By signing and submitting a proposal under this solicitation, the Offeror certifies that if awarded the contract, it will have the following insurance coverages at the time the work commences. Additionally, it will maintain these during the entire term of the contract and that all insurance coverages will be provided by insurance companies authorized to sell insurance in Virginia by the Virginia State Corporation Commission.

During the period of the contract, Montgomery County reserves the right to require the Contractor to furnish certificates of insurance for the coverage required.

INSURANCE COVERAGES AND LIMITS REQUIRED:

A. Worker's Compensation - Statutory requirements and benefits.

B. Employers Liability - \$100,000.00

C. General Liability - \$500,000.00 combined single limit. Montgomery County and the Commonwealth of Virginia shall be named as an additional insured with respect to goods/services being procured. This coverage is to include Premises/Operations Liability, Products and Completed Operations Coverage, Independent Contractor's Liability, Owner's and Contractor's Protective Liability and Personal Injury Liability.

D. Automobile Liability - \$500,000.00

The contractor agrees to be responsible for, indemnify, defend and hold harmless Montgomery County, its officers, agents and employees from the payment of all sums of money by reason of any claim against them arising out of any and all occurrences resulting in bodily or mental injury or property damage that may happen to occur in connection with and during the performance of the contract, including but not limited to claims under the Worker's Compensation Act. The contractor agrees that it will, at all times, after the completion of the work, be responsible for, indemnify, defend and hold harmless Montgomery County, its officers, agents and employees from all liabilities resulting from bodily or mental injury or property damage directly or indirectly arising out of the performance or nonperformance of the contract.

8. **MINORITY BUSINESS, WOMEN-OWNED BUSINESSES SUBCONTRACTING AND REPORTING:** Where it is practicable for any portion of the awarded contract to be subcontracted to other suppliers, the contractor is encouraged to offer such business to minority and/or women-owned businesses. Names of firms may be available from the buyer and/or from the Division of Purchases and Supply. When such business has been subcontracted to these firms and upon completion of the contract, the contractor agrees to furnish the purchasing office the following information: name of firm, phone number, total dollar amount subcontracted and type of product/service provided.

9. **PRIME CONTRACTOR RESPONSIBILITIES:** The Contractor shall be responsible for completely supervising and directing the work under this contract and all subcontractors that he may utilize, using his best skill and attention. Subcontractors who perform work under this contract shall

be responsible to the prime Contractor. The Contractor agrees that he is as fully responsible for the acts and omissions of his subcontractors and of persons employed by them as he is for the acts and omissions of his own employees.

10. **OWNERSHIP OF DOCUMENTS AND RECORDS:** Upon full payment to the Contractor, all concepts, ideas, plans specifications, management systems and approaches, records, reports, documents and other materials, including those in electronic form, (the “Documents”) prepared by the Contractor under the terms of this agreement shall become the exclusive property of the County, however the Contractor’s liability will be limited to the original intended use of the Documents. All materials shall be delivered to Montgomery County in usable condition after completion of the work, and prior to submission of the invoice for payment.
11. **SUBCONTRACTS:** No portion of the work shall be subcontracted without prior written consent of Montgomery County. In the event that the Contractor desires to subcontract some part of the work specified herein, the Contractor shall furnish Montgomery County the names, qualifications and experience of their proposed subcontractors. The Contractor shall, however, remain fully liable and responsible for the work to be done by his subcontractor(s) and shall assure compliance with all requirements of the contract.
12. **LIQUIDATED DAMAGES, GOODS AND NONPROFESSIONAL SERVICES:** Delivery is required not later than December 31, 2026. It is understood and agreed by the Offeror that time is of the essence in the delivery of supplies, services, materials or equipment of the character and quality specified in the proposal document. In the event these specified supplies, services, materials or equipment are not delivered by the date specified there will be deducted, not as a penalty but as liquidated damages, the sum of \$1000 per day for each and every calendar day of delay beyond the time specified; except that if the delivery be delayed by any act, negligence or default on the part of Montgomery County, public enemy, war, embargo, fire or explosion not caused by the negligence or intentional act of the Contractor or his supplier(s), or by riot, sabotage or labor trouble that results from a cause or causes entirely beyond the control or fault of the contractor or his supplier(s), a reasonable extension of time as Montgomery County deems appropriate may be granted. Upon receipt of a written request and justification for any extension from the Contractor, Montgomery County may extend the time for performance of the contract or delivery of goods herein specified, at Montgomery County's sole discretion, for good cause shown.

**ATTACHMENT B
COUNTY OF MONTGOMERY
STANDARD CONTRACT**

Contract Number:

This contract entered into this ___ day of, 202__, by _____ hereinafter called the “Contractor” and the County of Montgomery, called the “County”.

WITNESSETH that the Contractor and the County, in consideration of mutual covenants, promises and agreements herein contained, agree as follows:

SCOPE OF SERVICES: The Contractor shall provide the services to the County as set forth in the Contract Documents.

CONTRACT PERIOD: The initial contract period is _____ through _____.

COMPENSATION AND METHOD OF PAYMENT: Payment to the County shall be made in accordance with the Contract Documents.

CONTRACT DOCUMENTS: The Contract Documents shall consist of signed Contract, the statement of need, general terms and conditions, special terms and conditions, specifications, and other data contained in this Request For Proposal Number, dated _____, together with all written modifications thereof, the proposal submitted by the Contractor dated _____ and the Contractor’s letter dated _____, all of which contract documents are incorporated herein.

In **WITNESS WHEREOF**, the parties have caused this Contract to be duly executed intending to be bound thereby.

CONTRACTOR:

COUNTY OF MONTGOMERY:

By: _____ By: _____

Title: _____ Title: _____

ATTACHMENT C
CERTIFICATION CRITERIA

The Certification Criteria for Contracted Virginia Real Estate Assessment Professionals dated January 1, 2025 is provided in a separate attachment and incorporated herein by reference.

ATTACHMENT D
SAMPLE APPRAISAL CARDS

Sample Appraisal Cards are provided in a separate attachment and incorporated herein by reference.