



2027 PATRICK COUNTY PROPERTY REASSESSMENT

Request for Proposals

IFB#2025-12320-0425

I. Introduction

1. Propose: This document constitutes a request for sealed proposals from qualified individuals and organizations to provide a general reassessment of all real property for the County of Patrick in accordance with Title 58.1 of the Code of Virginia.
2. Background: The last general reassessment for the County was completed in December of 2020.

II. Scope of Work

1. General Requirements:
 - a. There are approximately 20,500 taxable and 1100 non-taxable parcels of real estate in the County as follows:
Taxable – 20,500 Non-taxable – 1100 Total – 21,600
 - b. *Manufactured homes (code Section 58.1-3522) – 2,000*
 - c. The values to be estimated in all cases shall be 100% of fair market value as required by State Law and in keeping with good appraisal practice.
 - d. All appraisals will be based on a thorough study of recent market sales in the County, with due consideration to construction and rental data where available and applicable.
 - e. The market sales analysis will become the property of the County at the completion of said program.
 - f. *The reassessment shall begin upon award of contract and shall be completed by December 31, 2026.*

2. Primland Resort

- a. 12,000+ Acre Five Star Resort including Lodge, Cabins, Cottages, Single and Family Dwellings, Golf Course, Spa, Shooting Range, Hunting and Fishing Reserve.

3. Assist the Commissioner of the Revenue with the assessment of new construction and following the initial Reassessment and quarterly during Reassessment.

The contractor shall be responsible for conducting assessments of new construction projects within the county between the regular reassessment periods. These assessments shall be completed annually to update property valuations for new construction. The contractor shall identify and assess new construction, including residential, commercial, industrial, and other types of improvements, as part of the ongoing process.

The contractor will provide a comprehensive report of the assessed value of new construction, including any improvements, expansions, or significant renovations performed during the year; estimating the percent of complete as of January 1, to ensure that such new assessments are incorporated into the county's property tax roll by January 31, each year.

III. Specific Requirements

1. What the contractor shall provide and pay for:

- a. The contractor shall provide qualified appraisers. The contractor shall furnish to the County for acceptance or rejection a list of all persons to be employed. The County may require the contractor to remove from the project any person the County considers to be unqualified or negligent in the performance of his/her duties, or who is guilty of misconduct; and such person shall not be employed on the project again without the County's written consent.
- b. The contractor shall assume all transportation and travel expenses for his employees and supply all field equipment (i.e., tapes, roto-rules, etc.).
- c. The contractor shall appraise, code, and prepare for computer entry all parcels in the County. A parcel is defined as each line used in the Land Book.
- d. The contractor shall gather necessary information for future computer-assisted appraisal system.
- e. The insurance requirements are as follows:
 - (1) The successful contractor assumes and agrees to hold harmless, indemnify, protect and defend Patrick County against any and all liability for injuries and damages to contractor himself and to the contractor's employees, agents,

subcontractors and guests, third parties or otherwise, incidental to or resulting from any and all operations performed by contractor under the terms of this contract.

(2) In addition to any other forms of insurance or bonds required under contracts and specifications pertaining to this project, Patrick County shall require any contractor to whom or to which it lets any work contemplated hereunder to carry Public Liability Insurance and a Certificate of Insurance attesting to the required coverage.

(3) If any of the work is sublet, similar insurance shall be obtained by or on behalf of the subcontractor to cover their operation.

(4) The insurance specified shall be with an insurance company acceptable to parties hereto and licensed to do business in the State of Virginia.

(5) All insurance must be obtained before any work is commenced and kept in effect until its completion.

(6) Minimum insurance requirement are as follows:

(a) Worker's Compensation

(b) Automotive Liability: Bodily Injury and Property Damage Insurance shall have limits of \$1,000,000 combined single limits.

(c) Comprehensive General Liability: Bodily Injury Liability Insurance shall have limits of \$500,000 per occurrence.

- f. Performance Bond: Prior to the award of contract, the successful bidder shall provide an acceptable performance and payment bond in the amount of one hundred percent (100%) of the contract value.
- g. The contractor shall provide an appraiser, if requested by the Patrick County Board of Supervisors, to attend and assist at all hearings for review and equalization of appraisals. When and if a major disagreement on values occurs, the contractor will show both values on the appraisal cards.
- h. The contractor shall provide a competent witness for court appeals filed within a period of three years following the effective date of the reassessment.
- i. The contractor shall provide supervision of clerical staff hired by the County to ensure that all requirements for completion of the general reassessment are met. All clerical work is to be completed before the general reassessment book is signed and accepted by Patrick County.
- j. Work format for the contractor:
 - 1. The contractor shall visit each parcel of land and make a complete physical inspection.
 - 2. On each improved property, all main buildings will be measured and sketched on the property field card or work sheet.

3. The contractor shall conduct an interview with the property owner of each parcel if possible. If no one is there, a doorknob hanger will be left informing the individual of the reassessment and requesting the appropriate information. In the event information on the property is refused, a notation will be made on the field card and the property will be appraised on the best information available.
4. The contractor shall keep a record on the property card of each visit, the date, time, name of appraiser, and persons interviewed. Business and professional signs identifying the property shall be noted on the property card.
5. The contractor shall make speakers available for meetings with civic groups or other interested parties as directed by the Board of Supervisors for the purpose of disseminating general information pertaining to the reassessment process. During the general reassessment, the contractor will endeavor to promote good public relations with all taxpayers and the general public.

2. What the County shall provide and pay for
 - a. The County shall furnish the appraisal cards or work sheets to be used by the contractor which will show the name and address of the current owner, and a description of the property as shown on the land book, including the acreage and tax map number. A notation as to whether improvements presently exist on the property will also be shown on the field card.
 - b. The County shall provide office space, furniture, office equipment and telephone service.
 - c. The County shall furnish adequate clerical staff that will be under the supervision and direction of the contractor. All clerical work must be completed before the reassessment book is signed and accepted.
 - d. The County shall furnish the necessary office supplies, including postage and stationery for mailing notices and any advertising cost for hearings.
 - e. The County shall furnish and pay for all data processing including keypunching, computer, assessment book and reassessment notices. A numerical and alphabetical listing shall be provided under data processing.
 - f. The County shall mail the reassessment notices.
 - g. The County shall furnish a copy of local real estate tax maps. The contractor will also have use of the aerial photographs on the GIS web site. Land

transfers, tax map changes, and building permits issued will be available to the contractor during the term of contract.

IV. Proposal Contents

1. Interested firms are encouraged to provide their proposal with as much detail as possible pertaining to their firm's capabilities, experience, and approach to the task outlined in this request for proposals.
2. Interested firms are requested to specifically address the following items:
 - a. A complete description of the approach that will be taken to meet the outlined scope of work.
 - b. Resumes of the project team and key personnel to be assigned.
3. Interested firms should provide fee schedules:
 - a. The fee for pictures of dwelling and mobile homes.

V. Special Contract Terms and Conditions

1. The extent and character of the work to be accomplished by the firm shall be subject to the general control and approval of the Board of Supervisors or its authorized representatives. The firm shall comply with requests and/or orders issued by no one other than the Board's representatives acting within their authority for the county.
2. The firm shall identify all proposed subcontractors who will furnish services under the terms of the Request for Proposals. Subcontractors shall conform, in all respects, to the applicable provisions specified for the primary contractor and shall further be subject to approval by the County. The work to be done by the subcontractor shall be outlined in detail as indicated in Section IV herein.
3. Period of Performance:
 - a. The reassessment shall begin upon award of contract, and shall be completed by December 31, 2026.
4. Invoicing and Payment:
 - a. The contractor shall submit an invoice at the end of each calendar month, with such statement to include a detailed breakdown of all charges.
 - b. Invoices shall be based upon actual number of parcels completed and shall include progress reports. The County shall withhold ten (10) percent of the

total contract payment, pending completion of the project, submission of the final report, and presentation of the products.

- c. All such invoices will be paid promptly by the County, unless any items therein are questioned, in which event payment for the questioned amount shall be withheld, pending verification of the amount claimed and validity of the claim. The contractor shall provide complete cooperation during any such investigation.

VI. Evaluation of Proposals

1. The Evaluation Committee will screen each proposal and selection will be made on the basis of the following criteria:
 - a. Planned implementation of the project, as depicted in the proposal, and allocation of man-hours.
 - b. References (i.e., satisfaction of former clients) along with names, addresses, contact persons, and telephone numbers of parties for whom comparable work has been performed.
 - c. Credentials of project team proposed to perform work.
 - d. Credentials of all subcontractors (where applicable).
 - e. Overall quality of work sample submitted.
 - f. Understanding of problems and task, as depicted in proposal.

Proprietary information received will not be disclosed to others during the selection process.

VII. Preparation and Submittal of Proposals

1. All proposals shall be signed in ink by authorized personnel of the firm.
2. Proposals are to be submitted in a sealed envelope. The envelope shall be plainly marked on the outside (RFP#2025-12320-0425 – 2027 Patrick County Reassessment”).
3. Proposals must be received by the Patrick County Administration Office, no later than 4:00 PM on Friday, May 2, 2025. Proposals may be mailed to Glennda Morse, Commissioner of the Revenue, P.O. Box 367, Stuart, Virginia 24171 or hand delivered to the Patrick County Administration Office, Patrick County Veterans Memorial Building, 106 Rucker Street, Ste. 220, Stuart, Virginia 24171. Emailed proposals must be sent to Glennda Morse, gmorse@co.patrick.va.us with a copy to Ruth Russell, rrussell@co.patrick.va.us. Requests for extensions of this date will not be granted.

Consultants mailing proposals should allow for normal mail time to ensure receipt of their proposals prior to the deadline. Proposals will be logged in on the date specified above and privately opened. The firm shall submit eight (8) copies of the written proposal to the County.

4. All proposals submitted shall be valid for a minimum period of ninety (90) calendar days following the date established for opening.

VIII. Miscellaneous requirements

1. The County will not be responsible for any expenses incurred by a firm in preparing and submitting a proposal. All proposals shall provide a straightforward, concise delineation of capabilities to satisfy the requirement of this request. Emphasis should be on completeness and clarity of content.
2. Any contractor who submits a proposal in response to this RFP may be required to make an oral presentation of this proposal. The County Administrator will schedule the time and location for this presentation.
3. The contents of the proposal submitted by the successful proposer and this RFP will become a part of any contract awarded as a result of these specifications. The successful contractor will be expected to sign a contract with the County. Additional terms and provisions will be included in the contract.
4. The County reserves the right to reject any and all proposals received by reason of this request, or to negotiate separately in any manner necessary to serve the best interest of the County. The County also reserves the right to request a non-binding fee estimate from the two or more offers deemed most qualified after ranking of all responders has been completed. Firms whose proposals are not accepted will be notified in writing.
5. The contractor is prohibited from assigning, transferring, conveying, subletting, or otherwise disposing of this agreement or its right, title or interest therein or its power to execute such agreements to any other person or company, without approval in writing by the County.

IX. Deliverable Products and Ownership

1. The contractor shall provide all finished products to the County Administrator or his designee. Written progress reports shall be submitted on a monthly basis. All related information, notes, worksheets and interim material shall be the sole property of the County, unless otherwise specified in this proposal.

X. Hold Harmless Clause

1. Proposals shall provide for the contractor to hold harmless the county and representatives thereof from all suits, action, or claims of any kind brought on account of any injuries or damages sustained by any person or property in consequences of any neglect in safeguarding contract work, or on account of any act of omission by the contractor or his employees, or from any claims or amounts arising or recovered under any law, bylaw, ordinance, regulation or decree.

XI. Proposed Timeline and Milestones for Expected Scope of Work

July 1, 2025

1. Setting up of office, to be provided by the County, will begin. Installation of CAMA appraisal software.
2. Certificate of Insurance and required performance bonds will be provided at this time.
3. Property record cards provided by the County will be processed.
4. Sales analysis and construction analysis will commence at this time and be completed. All data necessary to develop the schedules of values will be acquired by reviewing property sales and talking with real estate brokers, bankers, and construction contractors.
5. Property Reassessment Manual will also be developed which will detail the principles of a uniformed property reassessment, schedules of land, and building values. The manual will also give an explanation as to the various approaches used in the reappraisal process, such a market, cost and income.

August 1, 2025

1. The manual will be given to the Board of Supervisors for their review and acceptance of the schedules.
2. In order to ensure an equitable reassessment, all field appraisers will review the newly developed schedules and reassessment manual. Field work will begin and will be completed during the next 12 months. An average production count of 1,785 parcels per month will be the objective in order to appraise approximately 21,600 parcels.
3. All field personnel will have proper identification, including displaying signs on their cars which will read "County Reassessment".
4. Appraisers will make an exterior inspection of all residential properties. Rural properties will be visited and inspected in the same manner as other residential buildings. On each improved property, all major buildings will be measured and sketched on the property field card.

5. Commercial properties shall be visited and inspected in the same manner as residential properties. For the appraisal of these properties, replacement cost, less any physical depreciation, functional or economic obsolescence, income and expense data and market data will be used. Small industrial plants shall be appraised in the same manner as commercial properties. All other property, including tax exempt properties and properties required by law to be appraised will be appraised at market value using acceptable appraisal standards.

September 1, 2026

1. All new construction will be completed by this time. Every effort will be made to work in conjunction with the Commissioner of Revenue in appraising new construction and additions, ensuring that this function will not be duplicated by the appraisers or by the Commissioner's office or omitted by both.
2. The County will process the notices and will mail the notices out to property owner. All postage will be supplied by the County.

October 1, 2026

1. Informal hearings will be held and completed. The Professional Assessor, along with the recommended appraisers, will be assigned to explain, discuss, and hear all complaints concerning assessments.
2. Field rechecks will be made and all revised notices will be processed and mailed by the County to property owners.

December, 2026

1. The reassessment book will be printed and finalization of the reassessment will be made with the Professional Assessor signing the book.
2. Should any legal action develop after the completion of the reassessment, the contractor agrees to testify concerning such matters at no additional charge for the period of three years from the date of January 1, 2027.

Proposals submitted that are not in the required format and that do not have the content required by Specification section above shall not be considered. Any proposal received after the date and time set forth herein shall not be considered and will be returned unopened to the bidder. Patrick County reserves the right to reject any and all proposals submitted and to award the contract where it appears to be in the best interests of Patrick County.

This Request for Proposal (RFP) consists of multiple parts, and bidders are invited to submit proposals for the entire scope of work or any individual part(s). You may choose to bid on:

1. The complete set of duties as outlined in the RFP.
2. Specific parts or sections of the work as detailed in the scope of work.

Please clearly indicate in your proposal the parts you are bidding on, whether it is the full scope or individual sections. We encourage bidders to propose solutions for any or all parts, as each part may be awarded separately based on the evaluation of the respective proposals.

Patrick County is an Equal Opportunity Employer and will not discriminate on the basis of race, creed, color, sex, national origin, age, handicap or familiar status. Local, minority and female owned firms are encouraged to participate. Patrick County is a drug-free workplace pursuant to the requirements of the Code of Virginia.