



County of King William, Virginia

**BOARD OF SUPERVISORS
WORK SESSION MEETING OF OCTOBER 4, 2021 - 7:00 PM
KING WILLIAM COUNTY ADMINISTRATION BUILDING
KING WILLIAM, VIRGINIA**

A M E N D E D A G E N D A

- 1. Call to Order**
- 2. Roll Call**
- 3. Review and Adoption of Meeting Agenda**
- 4. Work Session Matters**
 - a. Fire & EMS Department Report - Stacy Reaves, Fire Chief
 - b. Human Resources Update - Nita McInteer, Human Resources Manager
 - c. Reassessment Contract with Pearson's Appraisal Service, Inc. - Steve Hudgins, Interim County Administrator
 - d. Land Use Discussion - Charles Piersa, Farm Bureau President**
- 5. Board of Supervisors' Requests**
- 6. Closed Meeting (if necessary)**
 - a. Motion to Convene Closed Meeting
 - b. Motion to Reconvene in Open Session
 - c. Certification of Closed Meeting
 - d. Action on Closed Meeting (if necessary)
- 7. Adjourn or Recess**

NOTES REGARDING AGENDA:

This agenda is tentative only and subject to change by the Board of Supervisors.

There is no Public Comment Period during Work Sessions.

AGENDA ITEM 4.a.

Fire & EMS Department Report - Stacy Reaves, Fire
Chief



Stacy Reaves, Fire Chief

King William Fire & Emergency Services Department Report October 4, 2021

- Increase in infections and hospitalizations indicate another period of high COVID-19 positive rates.
- The region is continuously in Status Black requiring VCU to determine ambulance destinations. This can and does lead to extended transport and turnaround times.
- The fire department has seen a significant increase in COVID positive patients. Several of the cases have been vaccinated. The vaccinated patients seem to have much better outcomes. Most of the patients in the region in ICU beds with COVID-19 are not vaccinated.
- COVID-19 policies for Fire and EMS personnel have been updated to reflect recent CDC recommendations. The station remains closed to the public, personnel still perform screenings when coming on shift, and facemasks are still required when social distancing cannot occur.
- The county masking policy for all county buildings and continued decontamination efforts have proven to help mitigate contamination and spread of COVID 19 within the work force within the buildings.
- Staffing is insufficient and the situation is worsening. We continuously run out of county resources with the increasing demands of medical calls and many part time employees are unable to work due to requirements from their full-time jobs. It will be imperative that we increase our full-time employee numbers to meet the demands of the county.
- The transition to ESO for all county departments is continuing and currently on schedule for implementation over the next few months.
- The new ambulance is expected to be completed by December. Construction has officially begun.
- Currently working with VDEM on the EOP and evaluation of the current plan.

AGENDA ITEM 4.b.

Human Resources Update - Nita McInteer, Human
Resources Manager



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Board of Supervisors

William L. Hodges, First District
Travis J. Moskalski, Second District
Stephen K. Greenwood, Third District
C. Stewart Garber, Jr., Fourth District
Edwin H. Moren, Jr., Fifth District

DATE: October 4, 2021

TO: King William County Board of Supervisors

FROM: Nita McInteer, Human Resources Manager

SUBJECT: Recommended Adjustment to the Overtime and Compensatory Time Policy

SUMMARY

The following recommendations are being made to update the King William County Personnel Policies and Procedures Manual as it pertains to the overtime and compensatory time policies. These changes come from the recent General Assembly changes to compensatory time paid by local government entities. The prohibition of awarding compensatory time was repealed in the August session of the General Assembly, but in consultation with Sands Anderson the below changes were recommended to bring the County in line with FLSA rules and regulations.

Chapter 3:

Section 3-5 Pay for Performance Increases: The established salary scale for employees who work thirty-five or forty hour week is computed on 2080 work hours per year.

Section 3-15 Premium Pays: The overtime pay rate is one and one-half times the regular hourly rate of pay or time worked.

Overtime hours in excess of forty (40) in a standard weekly work period are credited to employees in compensatory time the month after it is earned.

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Section 13-2 Hours of Work: The normal work schedule for regular full-time employees is thirty-five (35) hours per week, seven (7) hours per day. The workday begins at 8:30 and ends at 4:30 and includes an hour lunch period. Because of differing requirements, schedules may vary from these times. Department heads may adjust the workday beginning and ending times and lunch schedules provided that full-time employees work a minimum of seven (7) hours each day (not including a lunch period) and that administrative offices are adequately staffed and open from 8:30am to 4:30pm Monday through Friday. Any regular schedule for more than eight (8) or less than seven (7) hours per workday must be approved by the Department Head with notice to the County Administrator. The fifty-two (52) week work year consists of 2080 work hours.

Section 3-5: Pay for Performance Increases

a. Employees are eligible for a pay for performance increases on their performance review date (PRD) until they reach the maximum salary for their position. Once an employee has reached the maximum salary for their pay grade they are ineligible for pay for performance increases until such time as they have rendered 20 years of service to King William County. On the first PRD following the completion of 20 years of service and on each PRD thereafter, such employees are again eligible for a pay for performance increase.

b. Salary increases provided for by movement within a pay grade shall not accrue solely as a result of the completion of a required period of service, but shall be based on the established performance appraisal process.

c. When authorized, employees will receive a pay for performance salary increase. The average percentage or dollar increase and the range of allowable increases are established annually by the County Administrator based on the total funds allocated by the Board of Supervisors for such purpose as part of the budget approval process.

d. The established salary scale for employees who work a ~~thirty-five or a~~ forty-hour week is computed on 2080 work hours per year. ~~The established salary scale for employees who work a thirty-five hour week is computed on 1820 work hours per year.~~ Some public safety employees may be assigned different schedules and work hours based on departmental needs and Fair Labor Standards Act guidelines. All rates in the pay scale are those authorized for full-time employment for a period of 12 months and include compensation for holidays.

e. Pay for performance salary increases are effective on the PRD unless otherwise established by the Board. Department Heads will be advised of the approved allowable increases and the date by which completed performance reviews must be received in the designated personnel office. An employee is not eligible for a pay increase until the

performance review form has been completely processed and no pay increases will be given until the forms are properly completed, signed and received by the designated personnel office.

Section 3-15: Premium Pays

Premium pays are authorized as follows:

a. Overtime Pay

Overtime may be approved when necessary to accomplish particular tasks. The County Administrator shall designate those positions eligible for overtime pay or compensatory leave and those not eligible for such pay or leave in accordance with the standards of the Fair Labor Standards Act (FLSA). Positions designated as exempt or non-exempt from the provisions of the FLSA are so identified in the approved County Pay Plan. All overtime hours must be approved in writing by supervisor prior to being incurred. The signed overtime form should be attached to the employee time report for the month it was incurred.

The overtime pay rate is one and one-half times the regular hourly rate of pay or time worked, ~~in addition to the regular hourly rate or time worked~~. Overtime compensation is paid or granted in accordance with applicable state and federal laws. Except when otherwise required by state or federal law, compensation paid for a leave of absence is not counted as hours worked for overtime purposes and paid holidays, are not counted as hours worked for overtime purposes.

Overtime hours in excess of forty (40) in a standard weekly work period are credited to employees in compensatory time the month after it is earned. Compensatory time off, at the rate of one-and one-half times the number of hours worked, must be taken within the following pay period. Any leave taken in that pay

period (annual or sick) will be credited with the compensatory time before being applied. Any remaining compensatory time not used in that pay period will be remitted to the employee in that pay period.

b. Holiday Pay

With the exception of work-as-required employees, employees who do not work on a holiday are entitled to pay equal to the employees' regularly scheduled hours of work not to exceed eight (8) hours. An employee shall forfeit eligibility to be compensated for a holiday observed by the County unless he/she actually works the last scheduled day before the holiday and the first scheduled work day after the holiday or is on approved, sick, annual or non- exempt compensatory leave on such days.

Section 3-16: Additional Pay and Overtime Procedures

Holiday Premium Pay: Those non-exempt employees who work during any declared Holiday are paid overtime for those hours worked during such holiday leave time.

Employees called back: Non-exempt employees required to return to a work site, at least one hour after the termination of the employee's regular work shift, shall receive a minimum of two hours at the applicable pay rate.

Emergencies: This paragraph shall not apply to; firefighters and emergency medical services providers, deputies sheriff and communication dispatchers. Essential personnel required to work in addition to their normally scheduled hours during periods of authorized emergency conditions leave will receive pay at their normal hourly rate for all such hours worked in addition to their normally scheduled hours, until total hours actually worked exceed the applicable over- time threshold. In addition, such essential personnel will receive compensatory leave, on an hour

for hour basis, for any hours of required work performed during the periods of authorized

emergency conditions leave that fall within their normally scheduled work hours. Such compensatory time shall be used at a time approved by the appropriate supervisor. Any hours in which employees are not required to work during the period of emergency conditions leave will not count toward over-time eligibility. Employees in any other approved leave status (i.e., vacation, sick, military etc.) will remain in that status.

Section 13-2: Hours of Work

The standard weekly work period for all King William County Employees shall be from 12:01 a.m. Saturday through midnight Friday. The core hours for administrative offices of the County to be open for public business are 8:30 a.m. to 4:30 p.m., Mondays through Fridays, including periods of lunch.

The normal work schedule for regular full-time employees is thirty-five (35) hours per week, seven (7) hours per day, Mondays through Fridays. The workday begins at 8:30 a.m. and ends at 4:30 p.m. and includes an hour lunch period. Because of differing requirements, schedules may vary from these times. Department Heads may adjust the workday beginning and ending times and lunch schedules provided that full-time employees work a minimum of seven (7) hours each day (not including a lunch period) and administrative offices are adequately staffed and open from 8:30 a.m. to 4:30 p.m., Monday through Friday. Any regular schedule for more than eight (8) or less than seven (7) hours per workday must be approved by the Department Head with notice to the County Administrator. The fifty-two (52) week work year consists of 2080 work hours.

Part-time employees will work varied hours and days. Part-time employees are to report at their designated time, date and location per the published schedule. Failure to report for an assigned shift may be considered an absence without notice and the employee may be subject to disciplinary action or termination.

AGENDA ITEM 4.c.

Reassessment Contract with Pearson's Appraisal
Service, Inc. - Steve Hudgins, Interim County
Administrator



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Board of Supervisors

Interim County Administrator
Steve G. Hudgins

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DATE: September 27, 2021
TO: King William County Board of Supervisors
FROM: Steve Hudgins, Interim County Administrator
SUBJECT: 2023 Reassessment Contract

REQUEST FOR ACTION

Consider for approval the attached contract for Pearson's Appraisal Service, Inc. to perform King William County's 2023 General Reassessment.

SUMMARY

Highlights of the proposed contract include the following:

- A cost of \$28.00 per parcel with an estimated parcel count of 11,197
- Mr. Fred W. Pearson will sign the reassessment book
- An assessment office in the County administration building staffed during business hours for the duration of the contract
- Contractor to visit greater than 95% of all parcels in the County, and to have at least 2 pictures of key features of improved property
- Final reassessment values to be effective January 1, 2023

BACKGROUND

Pearson's Appraisal Service submitted the only proposal received by the County in answer to the RFP posted for King William County's 2023 General Reassessment.



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ATTACHMENTS

- King William County Contract for Consulting Services – Pearson's Appraisal Service
- RFP Reassessment 2021

**KING WILLIAM COUNTY
REASSESSMENT OF REAL PROPERTY**

**REQUEST FOR PROPOSALS
#RFP-2021-01**

King William County is now accepting competitive sealed proposals for the services of a qualified contractor to appraise real property at its fair market value as of January 1, 2023, as stated in Title 58.1-3201 of the Code of Virginia, and to perform a comprehensive sales study with corresponding appraisal manual for the purpose of this reassessment of real property. This reassessment shall include taxable and nontaxable parcels and exclude the reassessment of public service properties.

I. BACKGROUND

King William County is a rural county located 35 miles northeast of downtown Richmond. The County comprises 286 square miles and the Weldon Cooper Center for Public Service has estimated the 2020 population at 17,277. There are approximately 11,197 parcels of property listed with the Commissioner of the Revenue. King William County includes the incorporated Town of West Point, which shall be included in any comprehensive sales study with corresponding appraisal manual contract.

The County maintains Visions and Edmunds systems that network the offices of the County Administrator, Financial Services, Commissioner of the Revenue, Treasurer and Building Inspections. Information on the Vision real estate appraisal software module will be provided upon request.

II. SCOPE OF WORK

A. Contract Employee Requirements

1. The Contractor shall be certified as qualified by the Virginia Department of Taxation in order to be appointed by the Board of Supervisors to perform the reassessment. In all cases uniformity and equality are required under the laws of the Commonwealth of Virginia with respect to each class of property. All aspects of this general reassessment shall be conducted in accordance with the laws of the Commonwealth of Virginia and the Uniform Standards of Professional Appraisal Practices (USPAP)
2. The Contractor shall provide a professional assessor, certified by the Virginia Department of Taxation, to serve in lieu of a Board of Assessors in accordance with the Code of Virginia, 1950, as amended, Section 58.1-3275. The professional assessor shall be assigned to the County for the duration of the reassessment project.
3. The Contractor shall furnish to the County for acceptance or rejection a list of all persons to be employed including their qualifications. The County may require the Contractor to remove from the project any person the County considers being unqualified or negligent in the performance of their duties, or who is guilty of misconduct, such person shall not be employed on the project again without the County's written consent.
4. Contractor shall provide vehicles for use by the Contractor's personnel. Vehicles must be identifiable by signs provided by the Contractor and located on each side of said vehicles. A list of all personnel and vehicles shall be furnished to the Commissioner of the Revenue's Office and Sheriff's Office that identifies each vehicle and staff member in detail. Each staff member of the Contractor shall always carry a picture ID and present such when speaking with the citizens of King William County

concerning their property. Personal identification badges, with pictures, will be at the expense of the Contractor.

5. The Contractor shall be expected to coordinate the activities of its employees to ensure timely completion of the work. It shall be required that the Contractor cooperate fully with the offices of the County Administrator, Financial Services and Commissioner of the Revenue to control the quality of the study as well as deal with other relevant issues affecting the study.
6. The Contractor's staff shall always be expected to display courtesy and professionalism in dealing with citizens, County staff, members of the Board of Supervisors and the Board of Equalization. While in the field the Contractor's staff shall wear appropriate identification badges on their shirts to clearly identify themselves to citizens.
7. The chief assessor and sufficient other qualified personnel satisfactory to the County shall be assigned to explain, discuss and hear all questions and concerns pertaining to the values established. The Contractor shall immediately make any necessary field reviews of all properties of disputed value. They shall also be expected to substantiate the sales data and appraisal manual entry value in question and the methods employed in the sales study. Additionally, they shall furnish recommendations for the disposition of any such complaints.
8. The Contractor shall provide the following:
 - a) All necessary personnel, including appraisers and support staff; this shall include supervision for all said staff. The Contractor shall also be responsible for staffing the reassessment office, housed at the County's Administrative building, during regular County business hours. Additionally, the Contractor shall provide tools of the trade, living expenses, travel and any other expenditure necessary for completion of the comprehensive sales data analysis and study as well as reassessment field work and office work.
 - b) Available staff for Board of Supervisors and/or Board of Equalization meetings on an as-needed basis.
9. The Contractor shall provide sufficient staff knowledgeable in Visions software to complete all data entry of field work in a timely manner to coincide with the timeline of reassessment and to provide phone support throughout the reassessment project. The reassessment office shall be staffed through January 13, 2023 to answer questions regarding informal hearing results and to refer citizens to the BOE support staff. Every attempt will be made to return calls within one (1) working day. Contractor shall keep logs of all calls and emails and track responses to questions.

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B. Monthly Communication

1. Contractor is responsible for providing biweekly reports to the County Administrator for tasks completed. Written summaries shall be provided on the last business day of the month to the County Administrator for review.
2. Contractor and available office and field personnel shall attend monthly work meetings to discuss the documentation provided to the County Administrator biweekly. Monthly status meetings to become biweekly once the market analysis is complete and field work has begun. These meeting shall generally be held at the County Administration Building Offices or may be conducted by telephone conference as determined by the County Administrator.

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C. Comprehensive Sales Study

1. The Contractor shall perform a comprehensive sales data analysis and study prior to producing the data for the appraisal manual for all real property in the County. This analysis will contain a sufficient number of valid real estate sales and/or transactions from the various classes of real estate within the County. Another sales analysis will be prepared at the end of the project so that any changes in the market during the work can be adjusted. The Contractor shall have access to Richmond MLS for more comprehensive sales information and market data.

2. This comprehensive sales study shall have a "Table of Contents" and the document shall include an executive overview of the findings. A copy shall be provided to the Commission of the Revenue, County Administrator, Director of Financial Services and (5) five-member County Board of Supervisors.
3. This sales analysis shall become the property of the County at the completion of the reassessment.
4. The County requires a sales study that identifies the sales statistics of the following types:
 - a) Commercial, Residential, Industrial, Agricultural
 - b) Unincorporated County Communities (specifically, area surrounding the Town of West Point, and the Acquinton, Aylett, Manquin, and Mangohick Communities)
 - c) Waterfront
 - d) Town of West Point (incorporated area)
 - e) Water and Wastewater availability vs. Well and Septic
5. Interim draft of the comprehensive sales data analysis and study would have to be produced prior to January 30, 2022 to give County staff enough time to evaluate the results before proceeding to the comprehensive assessment. County staff will have the month of February 2022, to evaluate the sales study and make recommended corrections or conditional approvals before proceeding.
6. The comprehensive reassessment of all properties in the County with corresponding key factors into the Visions system would be due December 31, 2022 to give County sufficient time to generate tax notices to the public.
7. The Contractor shall create new assessment table in Visions
8. The Contractor shall assess all new construction from July 1, 2021 thru December 31, 2022 in their comprehensive sales data analysis and study.

D. No Comprehensive Sales Data Available

1. In the absence of sales data for the comprehensive sales data analysis and study, the following methods are required. If another method is desired, it must be presented to and approved by County Administrator:
 - a) Larger commercial properties should be valued using a recognized pricing guide manual.
 - b) All apartments or two or more dwelling units designed or redesigned for such occupancy and all groups of apartment buildings are to be classified as apartment properties. The appraisal of apartments shall be complete with analysis of income and expense data, if obtainable. The income approach to value shall be considered in apartment appraisals and where actual rents are not available, economic rental estimates will be used.
 - c) Small industrial plants shall be appraised in the same manner as other commercial properties. For the more complex industrial properties a complete, separate report, summarized, typed and bound shall be furnished. Complex industrial properties in King William County are Nestle-Purina and WestRock. This report shall include a building-by-building component part description of construction and fixed equipment taxable real estate, showing 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 and size with the name of the building as known to the industry shown. The market and income approach to value should be utilized, if applicable.
 - d) All other real property not covered previously and required by law to be appraised by the County will be appraised at fair market value using acceptable appraisal standards.

E. Fieldwork

1. The County expects the Contractor to visit greater than 95% of all parcels in the County (11511+ parcels), and to have at least (2) two accurate pictures of key features of improved property

including the front and back of each residential structure and at least (1) one picture of outstanding improvements. For the duration of the contract, the Contractor shall deliver new construction assessments to the Commissioner of the Revenue on a monthly basis, including measuring and sketching new buildings and other major building improvements.

2. Collect all necessary information about a parcel accurately reflecting key information obtained in the County sales study that would lead to a corresponding value in the reassessment:
 - a) Square Footage
 - b) Additions and Structures
 - c) Quality of Construction
 - d) Grade
 - e) Visibility
 - f) Road Access
 - g) Utility Access
 - h) Zoning
3. Additional procedures for fieldwork:
 - a) In those cases where the homeowner is not available and the Contractor's employee cannot obtain all necessary information, a notice shall be left at the front door notifying the homeowner of the visit and requesting the homeowner to furnish the information.
 - b) Where a property is locked or otherwise inaccessible, the Contractor shall use current aerial maps and other maps to check for the existence of real estate structures and to estimate structure size, then validate these estimates against any existing permits.
 - c) Where a property is designated as vacant and is over 10 acres, the Contractor shall use the current aerial maps and other maps to check for the existence of previously undiscovered or non-permitted real estate structures. If found and property is accessible, the Contractor shall visit and perform an on-site review of the structure(s). If inaccessible, the Contractor shall follow procedures in (3b) above to determine value.
4. The Contractor shall maintain an organized office with field data kept in labeled hanging folders and file cabinets. At the end of the reassessment project, the Contractor will ensure that all project data is organized into files labeled by tax map numbers or other relevant headings. Maps shall be included separately, as well as results of the informal hearings.

F. Assessment Manual in Visions, or other comparable assessment system.

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1. Regardless of whether another assessment system is proposed, the Contractor should familiarize themselves with the Vision Assessment system and tools used to evaluate properties currently by the County.

Comparable assessment systems may be different but need to contain similar information.
2. The Contractor shall provide an assessment manual(s) that explains the principles used in their uniform mass appraisal property evaluation and that shows how these figures correspond to the comprehensive sales study of King William County. The manual will contain the following:
 - a) Procedure for appraising future properties in King William County for the Commissioner of the Revenue and County staff to reference
 - b) The process for rating a property in terms of location, utility access, quality, type, construction, and overall workmanship.
 - c) Data on replacement cost and depreciation
3. All maps, sketches, plats, tax records, data and information in possession of the County pertaining to properties covered by these specifications will be made available to the Contractor. This is to include the use of all information on property record cards.

G. Public Review of the Assessments

1. Prior to the informal hearings, reassessment notices shall be prepared by the Commissioner's Office in conjunction with the Contractor and mailed to all real property owners, with County Administrator approval prior to mailing.
2. The informal public hearings by the Contractor will be conducted by qualified firm representatives in the Board Room in the Administrative Building at the Court House complex or by phone or in writing. The County will give public notice of these meetings.
3. The supervising appraiser of the Contractor and field appraisers used to perform the reassessment shall be assigned to explain, discuss and hear all complaints concerning values established. The Contractor shall immediately make any necessary field reviews of all properties of disputed value. "Immediately" shall be defined as within five (5) business days. They shall also be expected to substantiate the assessed value in question and the methods employed in this reappraisal. Additionally, they will provide information regarding how the complaint will be addressed and how it affects other properties of like kind.

H. Support for the Board of Equalization

1. The formal public hearings will be conducted by the appointed Board of Equalization in the Board Room in the Administrative Building at the Court House complex. The County will give public notice of these meetings.
2. The Contractor shall provide available staff for the Board of Equalization meetings on an as-needed basis. The chief assessor and sufficient other qualified personnel satisfactory to the County shall be assigned to explain, discuss and hear all questions and concerns pertaining to the values established. The Contractor shall immediately make any necessary field reviews of all properties of disputed value. Additionally, they shall furnish recommendations for the disposition of any such complaints.
3. The Contractor shall furnish competent witnesses and supporting evidence as may be required to defend the comprehensive sales analysis and study of any properties in questions before the Board of Equalization.

I. Contingent Legal Proceedings

1. Testimony and/or other assistance with any subsequent legal matters
2. The Contractor shall also furnish said witness or witnesses and evidence for all court appeals filed within three (3) years from January 1 of the year in which the tax appraisal is effective without additional cost to the County.

J. County's Responsibility

1. Provide furnished office space
2. Computer support services for Vision
3. Printing of field cards/property record cards
4. Zoning classifications per parcel
5. Telephone
6. Information on previous reassessments or sales studies
7. Generate and mail reassessment notices
8. Advertise any public hearings (as required and conducting such hearings in accordance with the requirements of the Code of Virginia, 1950, as amended)
9. Provide maps to the Contractor for use during the comprehensive sales data analysis and study as well as tax maps with 911 addresses and aerial maps.
10. Attach pictures to the correct property in Vision.
11. Provide support staff for the Board of Equalization

The Board of Supervisors reserves the right to designate a "Contract Administrator" with significant experience in real estate appraisal and/or assessment, to provide contract management, appraisal evaluation and oversight, acting as a liaison between the County and Contractor. The Contract Administrator may audit the Contractor's work. The Contractor shall demonstrate a willingness to assist this Contract Administrator and shall make its records available to the Contract Administrator upon request.

III. INSTRUCTIONS TO OFFERORS

A. Sealed Proposals must be delivered and addressed to the King William County Department of Financial Services, Attention: Julie Mills, 180 Horse Landing Road #4, King William, VA 23086 on or before the closing date and time of August 6, 2021 at 3 PM. Proposals are to be submitted in sealed envelopes marked "**Sealed Proposal – REASSESSMENT OF REAL PROPERTY, RFP 2021-01**". Proposals not received by this date and time will be deemed undelivered and not accepted. Any Offeror who wishes his proposal to be considered is responsible for making certain that his proposal is received at the stated location by the proper time. No oral, telegraphic, electronic, facsimile, or telephonic proposals or modifications will be considered unless specified. The receiving time in the Department of Financial Services will be the governing time for acceptability of proposals. Proposals must bear original signatures and, where applicable, cost figures. If the offeror wishes to have unaccepted bids returned, it will be at their expense.

B. Proposals are opened publicly immediately after the stated deadline. Interested parties are invited to attend the proposal opening. A list of proposals received will be available within a reasonable time after the proposal opening.

C. Offerors' authorized representatives may withdraw proposals only by written request received before the Proposal Submittal Deadline. Unless otherwise stated in the published Request for Proposals, Offerors may not withdraw their proposals for a period of sixty calendar (60) days after the Proposal Submittal Deadline.

D. By submitting a proposal, the offeror agrees and warrants that it has examined all the proposal documents and if appropriate, the subject of the contract, and where the specifications require a given result to be produced, that the specifications are adequate, and the required results can be produced under the specifications in the contract. Omissions from the specifications shall not relieve the Offeror from the responsibility of complying with the general terms of the contract as indicated by the specifications. Once the award has been made, failure to have read all the conditions, instructions and specifications of the contract will not be cause to alter the original contract or proposal or for the Offeror to request additional compensation.

E. Offerors shall notify Julie Mills of the County Department of Financial Services promptly of any error, omission, or inconsistency that may be discovered during examination of the solicitation. Requests for interpretation, correction, or clarification shall be made in writing either by mail to King William County Department of Financial Services c/o Julie Mills, 180 Horse Landing Road #4, King William, VA 23086 or by email to jmills@kingwilliamcounty.us. All such notifications or questions shall arrive at least seven (7) working days before the Submittal Deadline. Any questions received after the deadline will not be addressed. Offeror's company name, address, phone and fax number, and contact person must be included with the questions or comments. All clarifications, corrections, or changes, to the solicitation documents will be made by Addendum **only**. Offerors shall not rely upon interpretations, corrections, or changes made in any other manner, whether by telephone or in person. Interpretations, corrections, and changes shall not be binding on the County unless made by Addendum. All Addenda issued shall become

part of the contract documents. Addenda will be provided to Offerors by posting on the County's website. It is the Offerors sole responsibility to ascertain that it has received all Addenda issued for this solicitation. All Addenda must be acknowledged and returned on or before the Submittal Deadline, unless otherwise directed by an Addendum. For this solicitation comments or questions will be accepted in writing through the end of the business day July 15, 2021. Written responses in the form of an addendum will be posted on the County's website, on or before July 23, 2021.

F. Potential Offerors needing special assistance under the Americans with Disabilities Act shall contact Julie Mills at (804) 769-4935 or jmills@kingwilliamcounty.us. Every reasonable effort will be made to allow every qualified Offeror to participate in the competitive process.

G. King William County reserves the right to accept or reject any or all proposals or portions of any proposal and to reissue said proposal.

H. King William County may make such reasonable investigations as deemed proper and necessary to determine the ability of any Offeror to perform. The Offeror shall furnish to the County all such information and data for this purpose as may be requested. The County reserves the right to inspect the Offeror's physical facilities prior to award to satisfy questions regarding the Offeror's capabilities. Further, the County reserves the right to reject any proposal if the evidence submitted by, or investigations of, such Offeror fails to satisfy the County that such Offeror is properly qualified to carry out the obligations of the contract.

I. By submitting a proposal, Offerors certify that their proposals are made without collusion or fraud and that they have not offered or received any kickbacks or inducements from any other Offeror, supplier, manufacturer or subcontractor in connection with their proposal and that they have not conferred on any public employee having official responsibility for this procurement transaction any payment, loan subscription, advance, deposit of money, services or anything of more than nominal value, present or promised, unless consideration of substantially equal or greater value was exchanged.

J. Unless otherwise provided in this solicitation, the name of a certain brand, make or manufacturer does not restrict Offerors to the specific brand, make or manufacturer named; it conveys the general style, type, character and quality of the article desired. Any article, which the County, in its sole discretion determines to be the equal of that specified, considering quality, workmanship, economy of operation and suitability for the purpose intended, shall be accepted.

K. Offerors organized or authorized to transact business in the Commonwealth pursuant to Title 13.1 or Title 50 shall include the identification number issued to it by the State Corporation Commission. Any Offeror that is not required to be authorized to transact business in the Commonwealth as a foreign business entity under Title 13.1 or Title 50 or as otherwise required by law shall include a statement describing why the Offeror or Offeror is not required to be so authorized.

L. All Offerors submitting a proposal to the County are subject to the decision of the County as to the quality of what is offered, responsiveness of the proposal or proposal and the responsibility of the Offeror. The purchasing agent, administrator, or public body, in their sole discretion, will evaluate proposals and in all cases the decision made shall be final. Every Offeror submitting a proposal or proposal agrees to abide by the decisions of such officials and all the terms of the County purchasing policy as a condition precedent to the submission of the proposal.

M. The firm, corporation or individual name of the Offeror must be signed in ink to any proposals or proposals submitted. In the case of a corporation, the title of the officer signing must be stated, and each

officer must be thereunto duly authorized. In the case of a partnership, the signature of at least one of the partners must follow the firm name using the term "member of the firm" or "general partner".

N. The contract will be awarded, or the proposals rejected as soon as reasonably possible. Upon award of the contract to an Offeror, such Offeror shall enter the contract by executing the contract and by furnishing any bonds specified herein and Certificate(s) of Insurance required to be procured within ten (10) calendar days after the date of the award or within such further time as the County may allow. Failure by the successful Offeror to enter a written contract and furnish required bonds and certificates within the allotted time shall be cause for the County to withdraw the award. A notice to proceed will be issued by the County within five (5) days of execution of the contract and furnishing of required documentation by the successful Offeror.

O. A Certificate(s) of Insurance shall be required within ten (10) days of the date of the award or before start or work, whichever comes first, demonstrating insurance coverage as specified in the contract documents. The certificate(s) must contain a provision stating that the coverages will not be canceled unless a minimum of fifteen (15) days prior written notice has been given to the County and be accompanied by necessary endorsements of the referenced policies.

IV. **SPECIFIC TERMS & CONDITIONS**

A. **Proposal Content:** The following information must be provided in a written proposal format, along with other data deemed relevant by the Offeror:

1. *Company profile:* This should include the Offeror's headquarters; location of the office that will manage the project; phone and fax number and email address; size, financial stability and organizational structure; years in business, number of full-time employees, Virginia State Corporation Commission number, etc.
2. *Proposed project team:* Please include resumes of only those staff to be assigned to the project.
3. *Related experience:* Please describe the Offeror's prior related experience and expertise including specifically that of the staff to be assigned to provide the services listed herein. Describe Offeror's experiences and/or capabilities in the following areas: reassessment of rural counties and reassessment of similar sized counties. Enclose relevant examples of similar projects, brands, or reports in which your agency has been involved. Provide name, addresses, contact persons and phone numbers of four references that can attest to your qualifications for this project.
4. *Project understanding:* Provide a narrative demonstrating the Offeror's full understanding of all services and tasks required to successfully administer to and complete this project.
5. *Project approach/methodology:* Provide a narrative fully and completely describing the approach/methodology proposed by the Offeror in providing these needed services. Detailed process flow charts fully outlining all steps, milestones, approval points, meetings etc. are preferable.
6. *Fees/costs:* Please provide complete, detailed and itemized description/breakdown of all fees, charges and costs associated with the services to be provided. Include all licenses, copyrights, and potential future maintenance fees, etc.

7. *Timeline of Project:* All fieldwork and corresponding assessment manual must be completed by September 16, 2022.

a) See Attachment A, “Timeline”, for all expected due dates

C. A contract is attached, Attachment D, that contains the general terms and conditions, in addition to those set out in this proposal that the County will expect to be a part of the contract with the successful offeror. The actual final terms will be negotiated with the selected Offeror and the format must be approved as to form by the County Attorney.

D. Insurance requirements are listed in Attachment B. The successful Offeror/contractor certifies that the Contractor and any subcontractors will maintain the insurance coverage required during the entire term of the contract and that all insurance will be provided by insurance companies authorized to sell insurance by the Virginia State Corporation Commission.

E. Performance bond shown on Attachment C will be required.

F. The following factors shall be considered in a descending order of importance in determining the most qualified firm or individual.

- a. Experience and qualifications of company (15 points)
- b. Experience and qualifications of personnel assigned to perform the service (15 points)
- c. Experience with waterfront, timber and mineral land assessment (15 points)
- d. Experience in providing services for other localities of similar size, scope and complexity (15 points)
- e. Familiarity with the County’s assessment software (5 points)
- f. Ability to provide services within the required timeline (10 points)
- g. Specific plan or methodology to be used to perform the services (5 points)
- h. Responsiveness and completeness of the proposal (5 points)
- i. Non-binding fee schedule (10 points)
- j. References from other clients (5 points)

G. Based on the evaluation factors listed in the previous paragraph, at least two (2) Offerors deemed to be the most qualified, responsible and suitable on the basis of initial responses shall be selected. (If less than two (2) proposals are received, then less than two (2) Offerors may be so selected.) Individual discussions shall then be had with each such Offeror.

Repetitive informal interviews shall be permissible. Offerors shall be encouraged to elaborate on their qualifications, scope of work, performance data, or expertise pertinent to the proposed project as well as any alternative concepts. These discussions may encompass non-binding estimates of total project costs, including, where appropriate, design, construction, and life cycle costs. Methods to be used in arriving at a price for services may also be discussed. Proprietary information from competing Offerors shall not be disclosed to the public or to competitors. Price of service may be discussed and considered but will not be the sole determining factor in concluding negotiations.

After negotiations have been conducted with each Offeror so selected (such negotiations may be conducted by the public body or an agent or committee of the public body), the Offeror shall be selected which in the opinion of the negotiator has made the best proposal and the contract shall be

offered to that Offeror. (When the terms and conditions of multiple awards are so provided for in the request for proposal, awards may be made to more than one Offeror.) Should the negotiator, after the initial submission of proposals, determine in writing that only one Offeror is fully qualified, or that one Offeror is clearly more qualified than the others under consideration, a contract may be negotiated and awarded to that Offeror without further delay.

A copy of such written determination shall be provided to the Purchasing Agent and to the approving authority when approval by other than the Purchasing Agent is required.

- H. Following the award of a contract or decision to award a contract, the County will announce such award of a contract or decision to award a contract on the County's website at Kingwilliamcounty.us. Subject to the provisions of Code of Virginia Section 2.2-4360, any offeror who desires to protest the award of a contract or decision to award a contract shall submit such protest in writing to the attention of Julie Mills., 180 Horse Landing Road, King William, VA 23086 (jmills@kingwilliamcounty.us) no later than ten days after the announcement of the award of a contract or decision to award a contract, whichever occurs first. Such protest shall be clearly identified as a protest and shall include the basis for the protest and the relief sought.
- I. No work shall be performed under this contract until the Contractor has been contacted by the Commission of the Revenue or such person or persons as authorized by the County. A list of authorized personnel will be provided to the successful Contractor. Any and all work performed without such approval shall be considered to be unauthorized work, will not be compensated for, and may be considered grounds for cancellation of contract.

V. GENERAL TERMS & CONDITIONS

- A. In accord with Section 2.2 – 4343.1 of the Code of Virginia, King William County does not discriminate against faith-based organizations in procuring goods or services and both the County and any contracted faith-based organization will comply with the provisions of that section.
- B. During the performance of any contract issued pursuant to this proposal, the Contractor agrees as follows:
1. The Contractor will not discriminate against any employee or applicant for employment because of race, religion, color, sex, national origin, age, disability or other basis prohibited by state law related to employment, except where there is a bona fide occupational qualification reasonably necessary to the normal operation of the Contractor. The Contractor agrees to post in conspicuous places, available to employees and applicants for employment, notices setting forth the provisions of this nondiscrimination clause.
 2. The Contractor, in all solicitations or advertisements for employees placed by or on behalf of the Contractor, will state that such Contractor is an equal opportunity employer.
 3. Notices, advertisements and solicitations placed in accordance with federal law, rule or regulation shall be deemed sufficient for the purpose of meeting the requirements of this section.

The Contractor will include the provisions of the foregoing paragraphs 1, 2 and 3 in every subcontract or purchase order of over \$10,000, so that the provisions will be binding upon each subcontractor or vendor.

C. With the following exceptions, procurement documents are subject to the Virginia Freedom of Information Act:

1. Cost estimates relating to a proposed procurement transaction prepared by or for the County shall not be open to public inspection.
2. Proposals and proposal records shall be open to public inspection only after award of the contract. Any Offeror may be allowed to inspect the proposal or proposal records after proposal opening or after the evaluation and negotiation of proposals are completed, and prior to award, unless the County decides not to accept any proposals or not to accept any of the proposals and to reopen the contract.
3. Trade secrets or proprietary information submitted to the County are not subject to disclosure if requested by the person submitting such information prior to or upon submission of the data or other materials. Any such request must identify what is to be protected and state the reasons therefor.
4. Any inspection of procurement transaction records under this section shall be subject to reasonable restrictions imposed by the Purchasing Agent to insure security and integrity of the records.

D. By submitting a proposal, Offerors certify that they do not and will not, during the performance of an awarded contract, knowingly employ an unauthorized alien as defined in the Federal Immigration Reform and Control Act of 1986.

E. During the performance of and awarded contract, the Contractor agrees to (i) provide a drug-free workplace for the Contractor's employees; (ii) post in conspicuous places, available to employees and applicants for employment, a statement notifying employees that the unlawful manufacture, sale, distribution, dispensation, possession, or use of a controlled substance or marijuana is prohibited in the Contractor's workplace and specifying the actions that will be taken against employees for violations of such prohibition; (iii) state in all solicitations or advertisements for employees placed by or on behalf of the Contractor that the Contractor maintains a drug-free workplace; and (iv) include the provisions of the foregoing clauses in every subcontract or purchase order of over \$10,000, so that the provisions will be binding upon each subcontractor or vendor.

For the purposes of this paragraph, "drug-free workplace" means a site for the performance of work done in connection with a specific contract awarded to a contractor pursuant to this proposal, the employees of whom are prohibited from engaging in the unlawful manufacture, sale, distribution, dispensation, possession or use of any controlled substance or marijuana during the performance of the contract.

F. Any business entity including those described in Subparagraph K of the Instructions to Offerors that enters into a contract shall not allow its existence to lapse or its certificate of authority or registration to transact business in the Commonwealth, if so required under Title 13.1 or Title 50, to be revoked or cancelled at any time during the term of the contract.

G. King William County (Federal I.D. #54-6001376) is exempt from Federal, State and local taxes. Taxes included on invoices will be deducted from the payment amount. Tax-exempt forms will be completed for a vendor upon request.

H. The Contractor agrees to indemnify, defend, and hold harmless King William County, it's governing body, officers, employees, and insurance carriers, individually and collectively, from all losses, claims, suits, demands, expenses, subrogation, attorneys' fees, or actions of any kind or nature resulting from personal injury to any person (including bodily injury and death), or damage to any property, arising or alleged to have arisen out of Offeror's negligent acts, errors, omissions, related to the provision of services and/or products specified under the contract provided that such liability is not attributable to the County's sole negligence. The amount and type of insurance coverage requirements set forth herein, or lack thereof, will in no way be construed as limiting the scope of indemnity as stated in this paragraph.

I. It is understood and agreed between the parties herein that the County shall be bound hereunder only to the extent of the funds available, or which may hereafter become available for the purpose of this agreement, and the agreement will be contingent upon annual appropriations by the Board of Supervisors of King William County. Failure of the Board of Supervisors to appropriate adequate funds for the terms of this Contract shall result in the immediate cancellation of the Contract. There shall be no penalty should the Board fail to make annual appropriations for this contract.

Timeline for 2019 Reassessment-Proposed Attachment A

2021

- RFP advertised July
- Questions due July 15th; addendum posted if necessary July 19th
- RFP due August 6th, 2021 at 3 PM
- Company chosen August/ September
- Field work starts in September/October. Reassessment office shall be staffed.

2022

- Monthly meetings held with Contractor, County Administrator, Finance, and Commissioner of the Revenue
- Interim draft of comprehensive sales study complete by January 30th. Reviewed by County and approved by February 28th.
- Fieldwork complete and assessments reviewed by September 16th
- Reassessment Notices mailed by October 1st
- Informal hearings by Contractor scheduled mid-October to early November
- Informal hearings by Contractor, in-person and in writing, held mid-October to early December
- Results of informal hearings mailed to homeowners by December 16th
- Reassessment complete by December 30st

2023

- Final Reassessment values effective January 1st, 2023
- Field work for fall/winter 2022 new construction through January
- Reassessment office staffed until January 13th, 2023
- Board of Equalization court-appointed January
- Commissioner of the Revenue change in assessment notices mailed in March for properties in land use with new values, and for fall/winter 2022 new construction
- Board of Equalization hearings February to April 1st
- Board of Supervisors hearings and set tax rate April/May

INSURANCE SPECIFICATIONS ATTACHMENT B

The intent of this insurance specification is to provide the coverage required and the limits expected for each type of coverage. Regarding the Automobile Liability and Commercial General Liability, the total amount of coverage can be accomplished through any combination of primary and excess/umbrella insurance. However, the total insurance protection provided for Commercial General Liability or for Automobile Liability, either individually or in combination with Excess/Umbrella Liability, must total \$1,000,000 per occurrence. This insurance shall apply as primary insurance with respect to any other insurance or self-insurance programs afforded the County of King William. The policies shall be endorsed to be primary with respect to the additional insured.

The successful Offeror shall carry Commercial General Liability Insurance in the amount specified below, including contractual liability assumed by the successful Offeror, and shall deliver a Certificate of Insurance together with necessary policy endorsements from carriers licensed to do business in the Commonwealth of Virginia. The Certificate shall show the County of King William named as an additional insured for the Commercial General Liability and Umbrella/Excess Liability coverage if such coverage is used to meet the specified amount of insurance. The contract includes the following indemnification agreement: "The Contractor agrees to indemnify, defend, and hold harmless King William County, its governing body, officers, employees, and insurance carriers, individually and collectively, from all losses, claims, suits, demands, expenses, subrogation, attorneys' fees, or actions of any kind or nature resulting from personal injury to any person (including bodily injury and death), or damage to any property, arising or alleged to have arisen out of Offeror's negligent acts, errors, omissions, related to the provision of services and/or products specified under the contract provided that such liability is not attributable to the County's sole negligence."

The County makes no representation or warranty as to how the successful Offeror's insurance coverage responds or does not respond. Insurance coverages that are unresponsive to the above indemnification provisions do not limit the successful Offeror's responsibilities outlined in the contract.

Title 65.2 of the Code of Virginia requires every employer who regularly employs three or more full-time or part-time employees to purchase and maintain workers' compensation insurance. If you do not purchase a workers' compensation policy, a signed statement is required documenting that you are in compliance with Title 65.2 of the Code of Virginia.

LIMITS:

Worker's Compensation	State of Virginia Requirements (Note 3)
Commercial General Liability	\$1,000,000 per occurrence \$2,000,000 annual aggregate
Automobile Liability	\$1,000,000 per occurrence
Professional Liability (E/O)	\$1,000,000 per occurrence (If stated as being required in the Specific Terms & Conditions)

**PERFORMANCE BOND
ATTACHMENT C**

KNOW ALL MEN BY THESE PRESENTS, that

(Name of Contractor)

hereinafter called the Principal, a _____ (Corporation, Partnership or Individual) and

(Name of Surety)

(Address of Surety)

hereinafter called Surety, are held and firmly bound unto King William County, Virginia, hereinafter called Owner, in the penal sum of _____ Dollars, (\$_____), in lawful money of the United States, for the payment of which sum well and truly to be made, we bind ourselves, successors, and assigns, jointly and severally, firmly by these presents.

THE CONDITION OF THIS OBLIGATION is such that whereas, the Principal entered into a certain Contract with the Owner, dated the day of _____, 20____, a copy of which is hereto attached and made a part hereof for the following:

_____.
NOW, THEREFORE, if the Principal shall well, truly and faithfully perform its duties, all the undertakings, covenants, terms, conditions, and agreements of said Contract during the original term thereof, and any extensions thereof which may be granted by the Owner, with or without notice to the Surety, and if he shall satisfy all claims and demands incurred under such Contract, and shall fully indemnify and save harmless the Owner from all costs and damages which it may suffer by reason of failure to do so, and shall reimburse and repay the Owner all outlay and expense which the Owner may incur in making good any default, then this obligation shall be void; otherwise to remain in full force and effect.

PROVIDED, FURTHER, that the said Surety, for value received hereby stipulates and agrees that no change, extension of time, alteration or addition to the terms of the Contract or to Work to be performed thereunder shall in any way affect its obligation on this Bond, and it does hereby waive notice of any such change, extension of time, alteration or addition to the terms of the Contract or to the Work.

PROVIDED, FURTHER, that no final settlement between the Owner and the Contractor shall abridge the right of any beneficiary hereunder, whose claim may be unsatisfied.

IN WITNESS WHEREOF, this instrument is executed in 4 counterparts each one of which shall be deemed an original, this the day of _____, 20____.

ATTEST:

PRINCIPAL

BY/TITLE	SEAL
----------	------

SEAL

Print or type name signed above

WITNESS TO PRINCIPAL

ADDRESS

ATTEST:

SURETY

BY (ATTORNEY IN FACT) SEAL

SEAL

Print or type name signed above

WITNESS AS TO SURETY

ADDRESS

NOTE: Date of Bond must be as to date of Contract. If Contractor is Partnership, all partners should execute Bond.

**KING WILLIAM COUNTY
CONTRACT FOR CONSULTING SERVICES
ATTACHMENT D**

Agreement No. _____

This contract made and entered into this ____ day of _____, 2017 by and between the King William County Board of Supervisors, hereinafter referred to as "Board", which term shall be construed to include any officer, representative or agent having authority to represent or act for it in relation to any part of the subject of this Agreement and Pearson's Appraisal Service, Inc, hereinafter referred to as "Consultant".

WITNESSETH:

WHEREAS, the Board desires to engage the services of the Consultant in connection with 2023 general reassessment hereinafter referred to as the "Project"; and

WHEREAS, the Board issued RFP 2021-01 for the purpose of identifying qualified firms to conduct the 2023 general assessment; and

WHEREAS, the Consultant has investigated and is aware of the requirements of the Project, which are set forth within RFP 2021-01.

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NOW, THEREFORE, for and in consideration of the mutual undertakings of the parties to this Contract, the Board and Consultant hereby covenant and agree, each with the other, that the Consultant shall provide services as an independent contractor in accordance with the terms and conditions of this Contract and the requirements of Exhibit(s). In the event of any conflict between the terms of this contract and similar terms included in any exhibit made a part thereof, the terms as stated in this contract shall control.

ARTICLE I: BASIC SERVICES

1.1 The Consultant shall enter upon the performance of this Contract with all diligence and dispatch, shall assiduously press to its complete performance and shall employ thoroughly competent, qualified and experienced personnel commensurate with the magnitude and intricacy of the work.

1.2 The Scope of Services to be furnished by the Consultant are specified in RFP 2021-01 and confirmed in Pearson's Appraisal Service, Inc.'s response to RFP 2021-01 and the Contract, as defined in Section 7.10 below to include but not limited to the September 22, 2021 Addendum. Pearson's basic service is to visit each real estate property, leave a door hanger at the property, capture one or two images of the main structure and one image of outbuildings visible from the street, perform the reassessment, and Fred W. Pearson will sign the reassessment book.

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ARTICLE II: BOARD'S AND CONSULTANT'S RESPONSIBILITIES

2.1 The County Administrator or his designated representative shall be the liaison between the Board and the Consultant and is authorized to act in the Board's behalf.

2.2 The Consultant agrees to commence work within ten (10) calendar days from the date of the notice to proceed, which shall be issued at the sole discretion of the Board. Any work performed prior to receipt of the notice to proceed will not be eligible for compensation.

2.3 If so indicated in the attached Exhibit(s), the Consultant shall not proceed on any task until it has received specific written authorization from the Board to proceed with that task.

ARTICLE III: ADDITIONAL WORK

3.1 The Scope of Services defined in this Contract and Exhibit(s) may be increased and/or modified as the work progresses and/or as the Board deems such increase and/or modification necessary to satisfactorily complete the Project. However, the Consultant will not undertake any increase and/or modification without prior written approval and supplemental agreement from the Board.

3.2 No change in the character or extent of the work to be performed by the Consultant which affects the time or the compensation shall be made except by supplemental agreement in writing between the Consultant and Board.

3.3 In any case, where the Consultant believes extra compensation is due for work and services not covered by this Contract or Exhibit(s), Consultant shall promptly notify the Board, in writing, of Consultant's intention to make a claim for such extra compensation before Consultant begins the work on which the claim is based. Before commencing work or services on which the Consultant will base a claim for extra compensation, Consultant shall obtain the Board's approval in writing.

ARTICLE IV: PAYMENTS

4.1 As compensation for said services as a consultant and for all services set forth in the Response to Request for Proposal 2021-01,, the Board agrees to pay the Consultant the sum of \$28.00 per parcel for the services provided and the completion of the Project. The Contractor shall be paid within thirty days of receipt of invoice for verifiably completed parcels during the fieldwork stage of the project, less retainage of 5%. Final payment of the retainage will be made when Board of Equalization has finalized its proceedings on the reassessment or by May 2023.

4.2 Payments to the Consultant will be made periodically but shall not be required more frequently than monthly in proportion to the work performed and shall be based on work completed to date. In no case will a payment for less than \$1,500 be honored other than for the completion of a specific task.

4.3 All contractual claims, whether for money or other relief, shall be submitted in writing no later than sixty (60) days after final payment; however written notice of the Consultant's intention to file such claim shall have been given at the time of the occurrence or the beginning of the work upon which the claim is based. All claims shall be made in accordance with Virginia Code Section 15.2-1243 et seq. and the Board shall render a final decision in writing with regard to any such claim, not later than sixty (60) days subsequent to receipt of any such claim in writing by the County Administrator.

ARTICLE V: ERRORS AND OMISSIONS

Any reports, plans, designs, or other items needed for a complete job, shall be checked for accuracy by the Consultant before submission of final documents. The Consultant will be required without additional compensation to correct any errors or omissions in any documents submitted and to clarify any ambiguities which may be discovered.

ARTICLE VI: ABANDONMENT AND TERMINATION

6.1 The Board reserves the right to terminate this Contract at any time for any reason upon written notice to the Consultant. If the Board shall terminate the services herein mentioned, the Consultant shall immediately deliver to the Board all data, completed or partially completed through both an electronic copy and a hard copy, and these shall be the property of the Board. If this Contract is terminated for any reason not the fault of Consultant, the earned value of the work performed shall be based upon the time actually devoted by the Consultant and Consultant's personnel to performance of the services specified in this Contract up to the date of the termination, and payment therefore shall be made at the rate set forth in the Exhibit(s). Such payment shall be made to the Consultant as a final payment in full settlement for the services hereunder or by supplemental agreement hereto. In the event of a termination for breach or default by Consultant, Board shall have access to all remedies available in equity or at law. The Board shall give ten (10) days' written notification to the Consultant of any termination.

6.2 This Contract may be terminated by the Consultant upon ten (10) days' written notice in the event of substantial failure by the Board to perform in accordance with the terms hereof through no fault of the Consultant. In the event of such termination by Consultant, the provisions of paragraph 6.1 immediately hereinabove shall apply mutatis mutandis, except that Consultant shall be entitled to no further or other compensation, either hereunder or by way of a claim for damages growing out of this Contract.

6.3 All completed documents are the property of the Board, and the Board may use any or all of said items at any time, either in connection with the project to which they are applicable or in connection with any future or additional project, whether or not owned or to be owned by the Board, or for any other purpose for which the Board may wish to use said items; provided, however, that the ownership of said items by the Board and the unlimited freedom to use them for any purpose in the future shall not deprive the Consultant of the right to use the documents for any purpose within Consultant's discretion in the future. During the performance of the services herein provided, the Consultant shall be responsible for any loss or damage to the documents, data or other pertinent information while in Consultant's possession, and any such loss or damage shall be restored at Consultant's expense. All documents shall strictly conform to all laws, statutes and ordinances, all applicable rules and regulations, and the methods and procedures of all government boards, bureaus or agencies having jurisdiction over the Consultant's services.

ARTICLE VII: MISCELLANEOUS

7.1 Multiple Copies - This Contract may be executed in any number of counterparts, each of which shall be deemed an original.

7.2 Severability of Clauses - It is agreed that the illegality or invalidity of any term or provision of this Contract shall not affect the validity of the remainder of this Contract, and it shall remain in full force and effect as if such illegal or invalid term or provisions were not contained herein.

7.3 The Consultant shall not engage the services of any person in the present employ of the Board for any work covered by this Contract without written permission of the Board.

7.4 The Consultant agrees to indemnify, defend, and hold harmless King William County, its governing body, officers, employees, and insurance carriers, individually and collectively, from all losses, claims, suits, demands, expenses, subrogation, attorneys' fees, or actions of any kind or nature resulting from personal injury to any person (including bodily injury and death), or damage to any property, arising or alleged to have arisen out of Consultant's negligent acts, errors, omissions, related to the provision of services and/or products specified

under the contract provided that such liability is not attributable to the County's sole negligence. Compliance by the Consultant with the insurance provisions hereof shall not relieve Contractor from liability under this provision.

Should Consultant or Consultant's employers, servants or agents use any of Board's equipment, tools, employees, or facilities, such will be gratuitous and Consultant shall release the Board, its officers, agents or employees from and indemnify and save harmless Owner from and against any claims for personal injuries, including death, arising out of the use of any such equipment, tools, employees, or facilities, whether or not based upon the condition thereof or any alleged negligence of Board in permitting the use thereof.

7.5 In no event shall the Consultant's duties to defend, save harmless and indemnify the Board hereunder be enforceable after the expiration of five (5) years from the date of completion of the services included in the Contract; provided, however, should any claim as is described in the immediately preceding paragraph relate to services performed by the Consultant after the date of substantial completion, then from the date of the performance of any such services, whichever is later.

7.6 Board and the Consultant each binds itself, its partners, successors, assigns and legal representatives to the other party to this Contract and to the partners, successors, assigns and legal representatives of such other party in respect of all covenants of this Contract. Neither the Board nor the Consultant shall assign, sublet or transfer its interest in this Contract without the written consent of the other.

7.7 The Consultant shall comply with the provisions of the laws of the Commonwealth of Virginia and all federal and local statutes, ordinances and regulations that are applicable to the performance of this Contract, and procure all necessary licenses and permits.

7.8 The Consultant shall maintain accounts and records, including personnel, property and financial records, adequate to identify and account for all costs pertaining to the Contract and such other records as may be deemed necessary by the Board to assure proper accounting for all project funds, both federal and non-federal shares. These records will be made available for audit purposes to the County or any authorized representative, and will be retained for three (3) years after the expiration of this Contract unless permission to destroy them is granted by the County.

7.9 Unless otherwise agreed, this Contract shall be performed within the time schedule established pursuant to Section 1.2. Time shall be of the essence as to this Contract and all supplemental agreements, except that reasonable additional time may be allowed for increased or additional work.

7.10 The contract shall consist of this signed contract together with Pearson's response to the Request for Proposal identified herein and the following component parts, all of which are made a part hereof as if set out in full:

1. Request for Proposals No. 2021-01 including all attachments thereto.
2. Consultant's Proposal dated August 2, 2021
3. Performance Bond
4. Certificate of Insurance
5. Notice to Proceed
6. Change Orders/Modifications (if any)

ADDENDA:

- No. 1, dated September 22, 2021
No. _____, dated _____
No. _____, dated _____

No. _____, dated _____

These constitute the entire agreement between the parties and no condition or provision, whether oral or written, in any previous communication by either of the parties or any prior agreement or other understanding between them shall be of any effect, anything in such communication or agreement to the contrary notwithstanding.

IN WITNESS WHEREOF, the Consultant and the Board have executed this Agreement pursuant to proper authority and in the manner appropriate to each.

Consultant:

King William County Board of Supervisors:

By: (Signature)

By: Steve Hudgins

Fred W. Pearson
Printed Name/Title

Title: County Administrator

Pearson's Appraisal Service, Inc
Company Name

Approved as to form:

Department Approval:

County Attorney

Commission of the Revenue

Addendum to RFP 2021-01

Reassessment of Real Property

Addendum No.: 1

Date: September 22, 2021

This addendum is issued to modify the previously issued bid documents and is hereby made a part of the bid documents.

In section II, scope of work, clarification has been made to number 8, section a.

The contractor shall also be responsible for staffing the reassessment office, housed at the County's Administrative building, during regular County business hours.

Also in section II, a revision has been made to section B, number 2.

Monthly Status meetings to become biweekly once the market analysis is complete and field work has begun.

There was addition to C. under section II.

7. The Contractor shall create new assessment table in Visions

Also under C. in section II, a revision was made to the dates listed.

8. The Contractor shall assess all new construction from July 1, 2021 thru December 31, 2022 in their comprehensive sales data analysis and study.

REQUEST FOR PROPOSAL KING WILLIAM COUNTY, VA 2023 GENERAL REASSESSMENT



SUBMITTED BY:
PEARSON'S APPRAISAL SERVICE, INC.
FRED W. PEARSON, CO-OWNER
P. O. BOX 36404
RICHMOND, VA 23235
1-888-573-2776
August 2, 2021



Julie Mills
King William County Department of Financial Services
180 Horse Landing Road #4
King William, VA 23086

August 2, 2021

Dear Ms. Mills:

I am pleased to submit a proposal on behalf of Pearson's Appraisal Service, Inc. for real estate appraisal services for the upcoming 2023 reassessment. Pearson's Appraisal Service, Inc. (PAS) has been a leader in mass appraisal in Virginia, North Carolina, and Georgia for over 35 years by successfully completing over 200 turn-key projects and appraising over 3,000,000 properties.

Our staff are very familiar with the real estate market in King William County and we have completed many projects in your area. We are finishing the reassessment in Charles City County and we have completed the last five (5) reassessments for the County. We are currently working on the reassessment in Westmoreland County and we are doing the reassessment in Richmond County. We completed the last two (2) highly successful reassessments for King and Queen County.

During our forty (40) years of working in Virginia, Pearson's has appraised more waterfront properties than any other firm. Based on the number of projects we have completed, our staff has extensive experience in appraising waterfront property, timber, and mineral land assessments.

For staffing, I am proposed as project manager. I am a Certified General Real Estate Appraiser and a Certified Professional Assessor. Randy Willis is proposed as the project supervisor with Michael Casey, David Baldwin, and Joseph Harper as appraisers. Miranda Berry is proposed as office staff for clerical and data entry. Our resumes are attached.

Our proposal includes the use of our Complete Appraisal Process Solution or CAPS software which is a tablet-based data collection technology. CAPS allows us to take all the tools of the tax office to the field for data verification and collection. We use CAPS in ninety percent (90%) of our projects.

The Request for Proposal states a Professional Assessor will be used. I would suggest the County consider the use of a Board of Assessors instead of a Professional Assessor. Based on the controversy of the most recent reassessment, a Board of Assessors comprised of property owners to make decisions about the values and hold hearings may provide the assurances the public needs concerning the reassessment and the values placed on the properties. Also considering the current level of assessment at approximately sixty five (65) percent of market the value increases will be more than recent assessments. We would of course support the Board of Assessors in providing values for their consideration and supporting the Board of Assessors during hearings while they would make the final decision concerning values and they would sign the reassessment book.



King William County Letter
Page two

If you have any questions or concerns with any of the information provided, please do not hesitate to contact me. I thank you for the opportunity to submit this proposal for the performance and completion of appraisal services. Our firm is experienced in providing the services requested and we understand the scope of work.

Our method of reassessing property compiles with industry and the International Association of Assessing Officers (IAAO) standards for mass appraisal.

Pearson's Appraisal Service, Inc is an Equal Opportunity Employer.

Sincerely,

A handwritten signature in blue ink that reads "Fred W. Pearson". The signature is fluid and cursive.

Fred W. Pearson
Owner/ Manager, Pearson's Appraisal Service, Inc.

Company Profile

Pearson's Appraisal Service, Inc. has been successfully providing appraisal services to Virginia and North Carolina counties and municipalities for the past 40 years; performing equitable revaluations and assisting tax offices with a variety of appraisal services. With our large staff of professional appraisers, we are able to provide assurance to our clients that their revaluation project is completed in a timely manner by experienced personnel.

Our success in the field of appraising can be greatly attributed to our dedicated and competent appraisal staff. We currently staff over 35 employees, many specializing in specific roles in the reappraisal process.

Bob and Fred Pearson are well respected within the mass appraisal industry for their hands-on approach and personal attention they give to each project, solution, and client. Fred W. Pearson is licensed as a Virginia and North Carolina Certified General Appraiser and together with Robert Pearson, Jr. they incorporated their appraisal company in 1981 in the states of Virginia and North Carolina. Since our incorporation, we have completed over 200 turn-key appraisal projects and have appraised over 3.0 million parcels.

Our company's experience with the use of computer assisted mass appraisal systems (CAMA) continues to grow with the number of contracts Pearson's Appraisal Service is awarded. CAMA systems vary from one locality to another and likewise, our appraisers have become adept users of a number of computer systems. They also receive support from our IT staff which has years of industry specific experience.

Pearson's Appraisal Service strongly believes in providing high quality and comprehensive appraisal services. We strive to maintain at all times ethical and professional standards. Our managers and owners are active members of the International Association of Assessing Officers, the Virginia Association of Assessing Officers, and the North Carolina Association of Assessing Officers.

Our company is an Equal Opportunity Employer.

Clarifications of Project Responsibilities

County	King William	Effective Date	1/1/2023
# Parcels	11,197	Begin Date	September 2021
% of Market	100%	Completion Date:	12/30/2022
Contact Name	Steve Hudgins	Cycle in Years	6
Contact Title	County Administrator	Existing CAMA system:	Visions/Edmunds
Contact Email	jmillis@kingwilliamcounty.us	Board of Assessors?	Professional Assessor
Requirements per RFP DUE: August 6, 2021 by 3:00 P.M.		GIS?	Yes

Task	County	Pearson	Additional Notes
Clerical		X	
Data Entry		X	
Sketch conversion into Visions	X		County responsible for appraisal data converted correctly
PRC's	X		
Office Space	X		
Office Supplies	X		
Telephone/Internet	X		
Printing Expenses	X		
Computer Hardware	X	X	
Bond		X	
Insurance		X	
Public Relations	X	X	Joint
New Construction		X	Assess 2022 New Construction
Review Properties using CAPS		X	Complete fieldwork September 2022
Mobile Homes		X	
Owner Notification Cards		X	Yes if additional information is needed
Digital Photos		X	Included with use of CAPS
Market Analysis/Sales Study		X	
Construction Cost Analysis		X	
Income Approach		X	
Appraiser Manual/Reassessment Guide		X	
Informal Hearings		X	
Appraisal Manual		X	
Prepare Notices	X		
Postage	X		
Land Book	X	X	
BOE Appeals	X	X	
Clerical for BOE	X		
Court Appeals	X	X	Three years

COST PROPOSAL FOR REASSESSMENT SERVICES

Ms. Julie Mills
King William County Department of Financial Services
180 Horse Landing Road #4
King William, VA 23086

Dear Ms. Mills:

Pearson's provides the following per parcel price for your consideration:

\$28.00 Per Parcel

Any parcels over the estimated parcel count of 11,197 will be charged at the same rate should the total count be less than 11,197 only the number of parcels appraised will be invoiced.



Fred W. Pearson, Co-Owner
Pearson's Appraisal Service, Inc.
PO Box 36404
Richmond, VA 23235
888-573-2776

August 2, 2021

**KING WILLIAM COUNTY
REASSESSMENT OF REAL PROPERTY**

**REQUEST FOR PROPOSALS
#RFP-2021-01**

King William County is now accepting competitive sealed proposals for the services of a qualified contractor to appraise real property at its fair market value as of January 1, 2023, as stated in Title 58.1-3201 of the Code of Virginia, and to perform a comprehensive sales study with corresponding appraisal manual for the purpose of this reassessment of real property. This reassessment shall include taxable and nontaxable parcels and exclude the reassessment of public service properties.

I. BACKGROUND

King William County is a rural county located 35 miles northeast of downtown Richmond. The County comprises 286 square miles and the Weldon Cooper Center for Public Service has estimated the 2020 population at 17,277. There are approximately 11,197 parcels of property listed with the Commissioner of the Revenue. King William County includes the incorporated Town of West Point, which shall be included in any comprehensive sales study with corresponding appraisal manual contract.

The County maintains and Edmunds systems that networks the offices of the County Administrator, Financial Services, Commissioner of the Revenue, Treasurer and Building Inspections. Information on Vision real estate appraisal software module will be provided upon request.

II. SCOPE OF WORK

A. Contract Employee Requirements

1. The Contractor shall be certified as qualified by the Virginia Department of Taxation in order to be appointed by the Board of Supervisors to perform the reassessment. In all cases uniformity and equality are required under the laws of the Commonwealth of Virginia with respect to each class of property. All aspects of this general reassessment shall be conducted in accordance with the laws of the Commonwealth of Virginia and the Uniform Standards of Professional Appraisal Practices (USPAP)
2. The Contractor shall provide a professional assessor, certified by the Virginia Department of Taxation, to serve in lieu of a Board of Assessors in accordance with the Code of Virginia, 1950, as amended, Section 58.1-3275. The professional assessor shall be assigned to the County for the duration of the reassessment project.
Fred W. Pearson, PAS Co-Owner, is a certified professional assessor and Mr. Pearson is proposed as the Project Manager for the reassessment.

We understand the RFP requests a certified professional assessor however we believe the County would benefit from having a Board of Assessors comprised of citizens. Due to the controversy of the last reassessment, a local Board of Assessors could be better received by the taxpayers of King William County.

The Board of Assessors would be responsible for setting values, hearing appeals, and signing the reassessment book. Pearson's would provide assistance for all aspects of the project but the Board of Assessors would make the final value decisions.

3. The Contractor shall furnish to the County for acceptance or rejection a list of all persons to be employed including their qualifications. The County may require the Contractor to remove from the project any person the

County considers being unqualified or negligent in the performance of their duties, or who is guilty of misconduct, such person shall not be employed on the project again without the County's written consent.

4. Contractor shall provide vehicles for use by the Contractor's personnel. Vehicles must be identifiable by signs provided by the Contractor and located on each side of said vehicles. A list of all personnel and vehicles shall be furnished to the Commissioner of the Revenue's Office and Sheriff's Office that identifies each vehicle and staff member in detail. Each staff member of the Contractor shall carry at all times a picture ID and present such when speaking with the citizens of King William County concerning their property. Personal identification badges, with pictures, will be at the expense of the Contractor.

For most of our projects, the county provides picture identification badges for both use in the field and access to county buildings. PAS will pay the expense of picture identification badges.

5. The Contractor shall be expected to coordinate the activities of its employees to ensure timely completion of the work. It shall be required that the Contractor cooperate fully with the offices of the County Administrator, Financial Services and Commissioner of the Revenue to control the quality of the study as well as deal with other relevant issues affecting the study with the County Administrator's Office being the primary contact.

Pearson's Appraisal Service agrees to coordinate all the required activities to ensure timely completion of the required work. We agree to fully cooperate with the local county offices and we have found the more the county is involved with the reassessment project the better the project outcome for both the county and the citizens.

6. The Contractor's staff shall at all times be expected to display courtesy and professionalism in dealing with citizens, County staff, members of the Board of Supervisors and the Board of Equalization. While in the field the Contractor's staff shall wear appropriate identification badges on their shirts to clearly identify themselves to citizens.

Pearson's Appraisal Service staff are trained and experienced in promoting friendly relations with taxpayers and county staff. Our field appraisers always wear identification badges while working outside the office.

7. The chief assessor and sufficient other qualified personnel satisfactory to the County shall be assigned to explain, discuss and hear all questions and concerns pertaining to the values established. The Contractor shall immediately make any necessary field reviews of all properties of disputed value. They shall also be expected to substantiate the sales data and appraisal manual entry value in question and the methods employed in the sales study as a whole. Additionally, they shall furnish recommendations for the disposition of any such complaints.

All our projects include some form of appeals hearings, and our staff is fully capable of explaining and discussing how reassessments are conducted, by what authority, and available appeal options. For any property owner Pearson's will address three inquiries and any additional inquiries will be forwarded to the county administrator. At the request of the county administrator Pearson; will answer additional questions at a cost of \$90.00 per hour.

8. The Contractor shall provide the following:

- a) All necessary personnel, including appraisers and support staff; this shall include supervision for all said staff. The Contractor shall also be responsible for staffing this office during regular County business hours (8:30-4:30 M/F). Additionally, the Contractor shall provide tools of the trade, living expenses, travel and any other expenditure necessary for completion of the comprehensive sales data analysis and study as well as reassessment field work and office work.

We agree to have staff on site conducting the reassessment including clerical and data entry staff. During the field review portion of the project most of the appraisal staff will be in the field conducting reviews.

- b) Available staff for Board of Supervisors and/or Board of Equalization meetings on an as-needed basis. ***PAS agrees to provide an experienced appraiser for the Board of Supervisors or Board of Equalization as needed.***

9. The Contractor shall provide sufficient staff knowledgeable in the Visions system to complete all data entry of field work in a timely manner to coincide with the timeline of reassessment and to provide phone support throughout the reassessment project. The reassessment office shall be staffed through January 11, 2023 to answer questions in regards to informal hearing results and to refer citizens to the BOE support staff. Every attempt will be made to return calls within one (1) working day. Contractor shall keep logs of all calls and emails and track responses to questions. ***PAS staff will request training to understand how King William County is using the Vision software then our experienced clerical/data entry staff will enter the collected data based on the County's specifications.***

B. Monthly Communication

1. Contractor is responsible for providing monthly reports to the County Administrator for tasks completed during the preceding month. Written summaries shall be provided on the last business day of the month to the County Administrator for review.
2. Contractor and available office and field personnel shall attend monthly work meetings to discuss the documentation provided to the County Administrator monthly. These meeting shall generally be held at the County Administration Building Offices, or may be conducted by telephone conference as determined by the County.

We agree to provide monthly project progress reports and to attend monthly meetings either in person or by phone.

C. Comprehensive Sales Study

1. The Contractor shall perform a comprehensive sales data analysis and study prior to producing the data for the appraisal manual for all real property in the County. This analysis will contain a sufficient number of valid real estate sales and/or transactions from the various classes of real estate within the County. Another sales analysis will be prepared at the end of the project so that any changes in the market during the course of the work can be adjusted. The Contractor shall have access to King William County MLS for more comprehensive sales information and market data. ***PAS has access to the King William County MLS. We plan to review the sales included in the comprehensive sales study to the MLS data available. PAS will use the MLS to verify conditions of sales and interior information. PAS staff will work with the tax office to make any corrections to tax data resulting from MLS data.***
2. This comprehensive sales study shall have a "Table of Contents" and the document shall include an executive overview of the findings. A copy shall be provided to the County Administrator, Director of Financial Services, (5) five-member County Board of Supervisors and Commissioner of the Revenue.
3. This sales analysis shall become the property of the County at the completion of the reassessment.
4. The County requires a sales study that identifies the sales statistics of the following types:
 - a) Commercial, Residential, Industrial, Agricultural
 - b) Unincorporated County Communities (specifically, area surrounding the Town of West Point, and the Acquinton, Aylett, Manquin, and Mangohick Communities)
 - c) Waterfront
 - d) Town of West Point (incorporated area)
 - e) Water and Wastewater availability vs. Well and Septic
5. Interim draft of the comprehensive sales data analysis and study would have to be produced prior to January 30, 2022 to give County staff enough time to evaluate the results before proceeding to the comprehensive assessment. County staff will have the month of February, 2022, to evaluate the sales study and make recommended corrections or conditional approvals before proceeding.

Pearson's Appraisal Service, Inc. (PAS) agrees to perform appropriate comprehensive sales data analyses prior to the appraisal of any real property in the County. Our analyses shall include qualified sales and transactions from the various classes of real property found in the County and shall take into account the difference in geographic areas. Our primary focus will be on 2021 and 2022 sales with the greatest weight on 2022 sales. We will review the sales and determine if they are in fact fair market value sales with the assistance of the Commissioner of the Revenue. We will visit all qualified sales and take photos of improvements. We will provide pertinent data regarding these transactions to the County and we will work with the County on the format of the report. We have extensive experience in appraising waterfront properties and we will give due consideration to all waterfront property sales.

6. The comprehensive reassessment of all properties in the County with corresponding key factors into Visions system or comparable system platform would be due December 31, 2022 to give County sufficient time to generate tax notices to the public.
7. The Contractor shall assess all new construction for the tax year 2022 in their comprehensive sales data analysis and study. ***It is agreed PAS will assess new construction for 2022.***

D. No Comprehensive Sales Data Available

1. In the absence of sales data for the comprehensive sales data analysis and study, the following methods are required. If another method is desired, it must be presented to and approved by the County Administrator:
 - a) Larger commercial properties should be valued using a recognized pricing guide manual.
 - b) All apartments or two or more dwelling units designed or redesigned for such occupancy and all groups of apartment buildings are to be classified as apartment properties. The appraisal of apartments shall be complete with analysis of income and expense data, if obtainable. The income approach to value shall be considered in apartment appraisals and where actual rents are not available, economic rental estimates will be used. ***It is customary in our projects to seek rents, expenses, and vacancy rates for apartments. In our experience a few owners or managers will provide data but we can use industry standard guides and services we subscribe to such as Marshall & Swift for pricing information and then make locational/geographic adjustments.***
 - c) Small industrial plants shall be appraised in the same manner as other commercial properties. For the more complex industrial properties a complete, separate report, summarized, typed and bound shall be furnished. Complex industrial properties in King William County are Nestle-Purina and WestRock. This report shall include a building-by-building component part description of construction and fixed equipment taxable real estate, showing 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 and size with the name of the building as known to the industry shown. The market and income approach to value should be utilized, if applicable. ***We have provided a similar building by building report for other Virginia reassessments. We understand the requirement.***
 - d) All other real property not covered previously and required by law to be appraised by the County will be appraised at fair market value using acceptable appraisal standards.

E. Fieldwork

1. The County expects the Contractor to visit greater than 95% of all parcels in the County (11204+ parcels), and to have at least (2) two accurate pictures of key features of improved property including the front and back of each residential structure and at least (1) one picture of

outstanding improvements. The Contractor shall deliver new construction assessments to the Commissioner of the Revenue on a monthly basis, including measuring and sketching new buildings and other major building improvements.

Our Complete Appraisal Process Solution or CAPS will be used to review all the parcels in King William County. As a part of the CAPS review digital images are captured. We propose to take at least two (2) digital images of the front of the main improvement and at least one (1) image of major outbuildings. We will work with the tax office to determine what outbuilding images are preferred.

2. Collect all necessary information about a parcel accurately reflecting key information obtained in the County sales study that would lead to a corresponding value in the reassessment:
 - a) Square Footage
 - b) Additions and Structures
 - c) Quality of Construction
 - d) Grade
 - e) Visibility
 - f) Road Access
 - g) Utility Access
 - h) Zoning

Pearson's staff will load the existing county tax data into our CAPS program and we will verify or correct the above listed tax office data. We will pay particular attention to the quality of construction and the grade of the improvement.

3. Additional procedures for fieldwork:

- a) In those cases where the homeowner is not available and the Contractor's employee cannot obtain all necessary information, a notice shall be left at the front door if possible notifying the homeowner of the visit and requesting the homeowner to furnish the information. ***PAS proposes to leave a door hanger or owner notification card at properties where additional information is needed to complete the tax listing.***
- b) Where a property is locked or otherwise inaccessible, the Contractor shall use current GIS aerial maps and other maps to check for the existence of real estate structures and to estimate structure size, then validate these estimates against any existing permits.
- c) Where a property is designated as vacant and is over 10 acres, the Contractor shall use the current GIS aerial maps and other maps to check for the existence of previously undiscovered or non-permitted real estate structures. If found and property is accessible, the Contractor shall visit and perform an on-site review of the structure(s). If inaccessible, the Contractor shall follow procedures in (3b) above to determine value.

4. The Contractor shall maintain an organized office with field data kept in labeled hanging folders and file cabinets. At the end of the reassessment project, the Contractor will ensure that all project data is organized into files labeled by tax map numbers or other relevant headings. Maps shall be included separately, as well as results of the informal hearings.

F. Assessment Manual in Vision System, or other comparable assessment system.

1. Regardless of whether or not another assessment system is proposed, the Contractor should familiarize themselves with the Vision Assessment system and tools used to evaluate properties currently by the County. ***We don't anticipate any issues with using the existing CAMA program to complete the reassessment.***

Comparable assessment systems may be different, but need to contain similar information.

2. The Contractor shall provide an assessment manual(s) that explains the principles used in their uniform mass appraisal property evaluation and that shows how these figures correspond to the comprehensive sales study of King William County. The manual will contain the following:
 - a) Procedure for appraising future properties in King William County for the Commissioner of Revenue and County staff to reference
 - b) The process for rating a property in terms of location, utility access, quality, type, construction, and overall workmanship
 - c) Data on replacement cost and depreciation

Almost all of our Virginia projects include the development of an Assessment Manual and we are confident we can provide a manual that is useful for the project and to the county after the project is completed. We propose to use the existing manual as the basis of the 2023 manual.

4. All maps, sketches, plats, tax records, data and information in possession of the County pertaining to properties covered by these specifications will be made available to the Contractor. This is to include the use of all information on property record cards.

PAS prefers to receive the tax data in digital form for use in our CAPS program.

G. Public Review of the Assessments

1. Prior to the informal hearings, reassessment notices shall be prepared by the County in conjunction with the Contractor and mailed to all real property owners, with County Administrator approval prior to mailing.
2. The informal public hearings by the Contractor will be conducted by qualified firm representatives in the Board Room in the Administrative Building at the Court House complex or by phone or in writing. The County will give public notice of these meetings.
In our experience the public relations aspect of the project is best handled if both the County and the contractor work together to get the word out and to provide opportunities for public input. We will not release any news about the project without first gaining county approval.
3. The supervising appraiser of the Contractor and field appraisers used to perform the reassessment shall be assigned to explain, discuss and hear all complaints concerning values established. The Contractor shall immediately make any necessary field reviews of all properties of disputed value. "Immediately" shall be defined as within five (5) business days. They shall also be expected to substantiate the assessed value in question and the methods employed in this reappraisal as a whole. Additionally, they will provide information regarding how the complaint will be disposed of and how it affects other properties of like kind.
P.A.S. highly recommends the use of a Board of Assessors. Property owner will be appealing to 3 to 5 board members assisted by P.A.S. staff.

H. Support for the Board of Equalization

1. The formal public hearings will be conducted by the appointed Board of Equalization in the Board Room in the Administrative Building at the Court House complex. The County will give public notice of these meetings.
2. The Contractor shall provide available staff for the Board of Equalization meetings on an as-needed basis. The chief assessor and sufficient other qualified personnel satisfactory to the County shall be assigned to explain, discuss and hear all questions and concerns pertaining to the values established. The Contractor shall immediately make any necessary field reviews of all properties of disputed value. Additionally, they shall furnish recommendations for the disposition of any such complaints.

3. The Contractor shall furnish competent witnesses and supporting evidence as may be required to defend the comprehensive sales analysis and study of any properties in questions before the Board of Equalization.

PAS understands the requirement to be available to assist the Board of Equalization with formal hearings.

I. Contingent Legal Proceedings

1. Testimony and/or other assistance with any subsequent legal matters
2. The Contractor shall also furnish said witness or witnesses and evidence for all court appeals filed within three (3) years from January 1 of the year in which the tax appraisal is effective without additional cost to the County.

Fred W Pearson, our co-owner, is recognized in multiple states by the courts as an expert witness in appraisal matters. He is a licensed certified general real estate appraiser in Virginia, North Carolina, and Delaware.

J. County's Responsibility

1. Provide furnished office space
2. Computer support services for Vision
3. Printing of field cards/property record cards
4. Zoning classifications per parcel
5. Telephone
6. Information on previous reassessments or sales studies
7. Generate and mail reassessment notices
8. Advertise any public hearings (as required and conducting such hearings in accordance with the requirements of the Code of Virginia, 1950, as amended)
9. Provide maps to the Contractor for use during the comprehensive sales data analysis and study as well as tax maps with 911 addresses and aerial maps.
10. Attach pictures to the correct property in the AS400.
11. Provide support staff for the Board of Equalization

PAS requests access to the Internet/Web. Our subscription services(CoStar and RealtyRates) are web based.

III. **INSTRUCTIONS TO OFFERORS**

A. Sealed Proposals must be delivered and addressed to the King William County Department of Financial Services, Attention: Julie Mills, 180 Horse Landing Road #4, King William, VA 23086 on or before the closing date and time of August 6, 2021 at 3 PM. Proposals are to be submitted in sealed envelopes marked **"Sealed Proposal – REASSESSMENT OF REAL PROPERTY, RFP2021-01"**. Proposals not received by this date and time will be deemed undelivered and not accepted. Any Offeror who wishes his proposal to be considered is responsible for making certain that his proposal is received at the stated location by the proper time. No oral, telegraphic, electronic, facsimile, or telephonic proposals or modifications will be considered unless specified. The receiving time in the Department of Financial Services will be the governing time for acceptability of proposals. Proposals must bear original signatures and, where applicable, cost figures.

- B. Proposals are opened publicly immediately after the stated deadline. Interested parties are invited to attend the proposal opening. A list of proposals received will be available within a reasonable time after the proposal opening.
- C. Offerors' authorized representatives may withdraw proposals only by written request received before the Proposal Submittal Deadline. Unless otherwise stated in the published Request for Proposals, Offerors may not withdraw their proposals for a period of sixty calendar (60) days after the Proposal Submittal Deadline.
- D. By submitting a proposal the offeror agrees and warrants that it has examined all the proposal documents and if appropriate, the subject of the contract, and where the specifications require a given result to be produced, that the specifications are adequate and the required results can be produced under the specifications in the contract. Omissions from the specifications shall not relieve the Offeror from the responsibility of complying with the general terms of the contract as indicated by the specifications. Once the award has been made, failure to have read all the conditions, instructions and specifications of the contract will not be cause to alter the original contract or proposal or for the Offeror to request additional compensation.
- E. Offerors shall notify Julie Mills of the County Department of Financial Services promptly of any error, omission, or inconsistency that may be discovered during examination of the solicitation. Requests for interpretation, correction, or clarification shall be made in writing either by mail to King William County Department of Financial Services c/o Julie Mills , 180 Horse Landing Road #4, King William, VA 23086 or by email to jmills@kingwilliamcounty.us. All such notifications or questions shall arrive at least seven (7) working days before the submittal deadline. Any questions received after the deadline will not be addressed. Offeror's company name, address, phone and fax number, and contact person must be included with the questions or comments. All clarifications, corrections, or changes, to the solicitation documents will be made by Addendum *only*. Offerors shall not rely upon interpretations, corrections, or changes made in any other manner, whether by telephone or in person. Interpretations, corrections, and changes shall not be binding on the County unless made by Addendum. All Addenda issued shall become part of the contract documents. Addenda will be provided to Offerors by posting on the County's website. It is the Offerors sole responsibility to ascertain that it has received all Addenda issued for this solicitation. All Addenda must be acknowledged and returned on or before the Submittal Deadline, unless otherwise directed by an Addendum. For this solicitation comments or questions will be accepted in writing through the end of the business day July 15, 2021. Written responses in the form of an addendum will be posted on the County's website, on or before July 23, 2021.
- F. Potential Offerors needing special assistance under the Americans with Disabilities Act shall contact Julie Mills at (804) 769-4935 or jmills@kingwilliamcounty.us. Every reasonable effort will be made to allow every qualified Offeror to participate in the competitive process.
- G. King William County reserves the right to accept or reject any or all proposals or portions of any proposal and to reissue said proposal.
- H. King William County may make such reasonable investigations as deemed proper and necessary to determine the ability of any Offeror to perform. The Offeror shall furnish to the County all such information and data for this purpose as may be requested. The County reserves the right to inspect the Offeror's physical facilities prior to award to satisfy questions regarding the Offeror's capabilities. Further, the County reserves the right to reject any proposal if the evidence submitted by, or investigations of, such Offeror fails to satisfy the County that such Offeror is properly qualified to carry out the obligations of the contract.

I. By submitting a proposal, Offerors certify that their proposals are made without collusion or fraud and that they have not offered or received any kickbacks or inducements from any other Offeror, supplier, manufacturer or subcontractor in connection with their proposal and that they have not conferred on any public employee having official responsibility for this procurement transaction any payment, loan subscription, advance, deposit of money, services or anything of more than nominal value, present or promised, unless consideration of substantially equal or greater value was exchanged.

J. Unless otherwise provided in this solicitation, the name of a certain brand, make or manufacturer does not restrict Offerors to the specific brand, make or manufacturer named; it conveys the general style, type, character and quality of the article desired. Any article, which the County, in its sole discretion determines to be the equal of that specified, considering quality, workmanship, economy of operation and suitability for the purpose intended, shall be accepted.

K. Offerors organized or authorized to transact business in the Commonwealth pursuant to Title 13.1 or Title 50 shall include the identification number issued to it by the State Corporation Commission. Any Offeror that is not required to be authorized to transact business in the Commonwealth as a foreign business entity under Title 13.1 or Title 50 or as otherwise required by law shall include a statement describing why the Offeror or Offeror is not required to be so authorized.

L. All Offerors submitting a proposal to the County are subject to the decision of the County as to the quality of what is offered, responsiveness of the proposal or proposal and the responsibility of the Offeror. The purchasing agent, administrator, or public body as the case may be, in their sole discretion, will evaluate proposals and in all cases the decision made shall be final. Every Offeror submitting a proposal or proposal agrees to abide by the decisions of such officials and all the terms of the County purchasing policy as a condition precedent to the submission of the proposal.

M. The firm, corporation or individual name of the Offeror must be signed in ink to any proposals or proposals submitted. In the case of a corporation, the title of the officer signing must be stated and each officer must be thereunto duly authorized. In the case of a partnership, the signature of at least one of the partners must follow the firm name using the term "member of the firm" or "general partner".

N. The contract will be awarded or the proposals rejected as soon as reasonably possible. Upon award of the contract to an Offeror, such Offeror shall enter into the contract by executing the contract and by furnishing any bonds specified herein and Certificate(s) of Insurance required to be procured within ten (10) calendar days after the date of the award or within such further time as the County may allow. Failure by the successful Offeror to enter into a written contract and furnish required bonds and certificates within the allotted time shall be cause for the County to withdraw the award. A notice to proceed will be issued by the County within five (5) days of execution of the contract and furnishing of required documentation by the successful Offeror.

O. A Certificate(s) of Insurance shall be required within ten (10) days of the date of the award or before start or work, whichever comes first, demonstrating insurance coverage as specified in the contract documents. The certificate(s) must contain a provision stating that the coverages will not be canceled unless a minimum of fifteen (15) days prior written notice has been given to the County and be accompanied by necessary endorsements of the referenced policies.

IV. SPECIFIC TERMS & CONDITIONS

A. **Proposal Content:** The following information must be provided in a written proposal format, along with other data deemed relevant by the Offeror:

1. **Company profile:** This should include the Offeror's headquarters; location of the office that will manage the project; phone and fax number and email address; size, financial stability and organizational structure; years in business, number of full time employees, Virginia State Corporation Commission number, etc. ***See our Company Profile on page four.***
2. **Proposed project team:** Please include resumes of only those staff to be assigned to the project. ***See Resumes Section***
3. **Related experience:** Please describe the Offeror's prior related experience and expertise including specifically that of the staff to be assigned to provide the services listed herein. Describe Offeror's experiences and/or capabilities in the following areas: reassessment of rural counties and reassessment of similar sized counties. Enclose relevant examples of similar projects, brands, or reports in which your agency has been involved. Provide name, addresses, contact persons and phone numbers of four references that can attest to your qualifications for this project. ***See below and our Client List Section for a more complete list of references.***

1. King & Queen County, VA
Approximately 7,400 parcels
Mr. Tom Swartzwelder
County Administrator
Tel.#(804)785-5975

2.Charles City County, VA
Ms. Denise Smith
Commissioner of Revenue
Charles City County, Va.
Tel.# (804)652-2162
dsmith@co.charles-city.va.us

3. Westmoreland County, VA
Approximately 30,000 parcels
Mr. Norm Risavi, County Administrator
P. O. Box 1000, Montross, VA 22520
Tel.#(804)493-0130

4. Richmond County
Approximately 7,200 parcels
Mr. R. Morgan Quicke, County Administrator
P. O. Box 1000
Warsaw, VA 22572
Telephone (804) 333-3415
rmquicke@co.richmond.va.us

4. *Project understanding:* Provide a narrative demonstrating the Offeror's full understanding of all services and tasks required to successfully administer to and complete this project. See *narrative throughout the RFP.*
5. *Project approach/methodology:* Provide a narrative fully and completely describing the approach/methodology proposed by the Offeror in providing these needed services. Detailed process flow charts fully outlining all steps, milestones, approval points, meetings etc. are preferable.

We are proposing a field review of the existing tax data characteristics. If the owner is present during the field inspection of their property, the appraiser will verify all exterior data. No interior inspections will be made, unless specifically requested by the property owner. If the property owner is not at home, and additional information is needed an owner-notification card or door hanger will be left for the property owner. Door hangers will not be left at all properties.

All county parcel data will be loaded into our Complete Appraisal Process Solutions software or CAPS and we will use CAPS for necessary field reviews and to capture images of the improved parcel improvements. We will capture at least two images of the front of the major improvement and one image of outbuildings that are visible from the street level. Our CAPS program was developed to allow field appraisers to take all of the tools and data available in the tax and GIS office to the field for review and updating.

PAS will use the existing County outbuilding measurements to verify or correct the measurements as necessary. Most of the data will be digitally verified and we will provide data for use in the Vision software program and we will data enter as necessary.

Our appraisers will measure and list for taxation all new construction based on county provided building permits and we will provide a new digital image of the new construction.

We propose using the existing tax data for manufactured homes and we will make changes as necessary. The notation of a manufactured home on the property will be noted in CAPS.

PAS prefers to receive digital copies of the property records cards and to return updated information by digital form for the county's use in the Vision software.

Pearson's Appraisal Service is very familiar with the requirements of an appraisal manual for the County and the Commissioner of the Revenue to use after the completion of the project. PAS will use the existing Appraisal Manual as the basis for the 2023 manual and PAS staff will recommend the necessary changes to detail the formulas, classifications, codes, grades, etc. used to calculate the 2023 values.

After the county prints and mails the notices of new value, PAS appraisers will be available for both informal and formal hearings.

6. *Fees/costs:* Please provide complete, detailed and itemized description/breakdown of all fees, charges and costs associated with the services to be provided. Include all licenses, copyrights, and potential future maintenance fees, etc. ***See our Cost Proposal***
7. *Timeline of Project:* All fieldwork and corresponding assessment manual must be completed by September 16, 2022.
 - a) See Attachment A, "Timeline", for all expected due dates

PAS agrees to the proposed "Timeline"

C. A contract is attached, Attachment D, that contains the general terms and conditions, in addition to those set out in this proposal that the County will expect to be a part of the contract with the successful offeror. The actual final terms will be negotiated with the selected Offeror and the format must be approved as to form by the County Attorney.

D. Insurance requirements are listed in Attachment B. The successful Offeror/contractor certifies that the Contractor and any subcontractors will maintain the insurance coverage required during the entire term of the contract and that all insurance will be provided by insurance companies authorized to sell insurance by the Virginia State Corporation Commission.

E. Performance bond shown on Attachment C will be required.

F. The following factors shall be considered in a descending order of importance in determining the most qualified firm or individual.

- a. Experience and qualifications of company (15 points)
- b. Experience and qualifications of personnel assigned to perform the service (15 points)
- c. Experience with waterfront, timber and mineral land assessment (15 points)
- d. Experience in providing services for other localities of similar size, scope and complexity (15 points)
- e. Familiarity with the County's assessment software (15 points)
- f. Ability to provide services within the required timeline (10 points)
- g. Specific plan or methodology to be used to perform the services (5 points)
- h. Responsiveness and completeness of the proposal (5 points)
- i. Non-binding fee schedule (10 points)
- j. References from other clients (5 points)

G. On the basis of the evaluation factors listed in the previous paragraph, at least two (2) Offerors deemed to be the most qualified, responsible and suitable on the basis of initial responses shall be selected. (If less than two (2) proposals are received, then less than two (2) Offerors may be so selected.) Individual discussions shall then be had with each such Offeror.

Repetitive informal interviews shall be permissible. Offerors shall be encouraged to elaborate on their qualifications, scope of work, performance data, or expertise pertinent to the proposed project as well as any alternative concepts. These discussions may encompass non-binding estimates of total project costs, including, where appropriate, design, construction, and life cycle costs. Methods to be used in arriving at a price for services may also be discussed. Proprietary information from competing Offerors shall not be disclosed to the public or to competitors. Price of service may be discussed and

considered but will not be the sole determining factor in concluding negotiations.

After negotiations have been conducted with each Offeror so selected (such negotiations may be conducted by the public body or an agent or committee of the public body), the Offeror shall be selected which in the opinion of the negotiator has made the best proposal and the contract shall be offered to that Offeror. (When the terms and conditions of multiple awards are so provided for in the request for proposal, awards may be made to more than one Offeror.) Should the negotiator, after the initial submission of proposals, determine in writing that only one Offeror is fully qualified, or that one Offeror is clearly more qualified than the others under consideration, a contract may be negotiated and awarded to that Offeror without further delay.

A copy of such written determination shall be provided to the Purchasing Agent and to the approving authority when approval by other than the Purchasing Agent is required.

- H. Following the award of a contract or decision to award a contract, the County will announce such award of a contract or decision to award a contract on the County's website at Kingwilliamcounty.us. Subject to the provisions of Code of Virginia Section 2.2-4360, any offeror who desires to protest the award of a contract or decision to award a contract shall submit such protest in writing to the attention of Julie Mills., 180 Horse Landing Road, King William, VA 23086 (jmills@kingwilliamcounty.us) no later than ten days after the announcement of the award of a contract or decision to award a contract, whichever occurs first. Such protest shall be clearly identified as a protest and shall include the basis for the protest and the relief sought.
- I. No work shall be performed under this contract until the Contractor has been contacted by the Commission of the Revenue or such person or persons as authorized by the County. A list of authorized personnel will be provided to the successful Contractor. Any and all work performed without such approval shall be considered to be unauthorized work, will not be compensated for, and may be considered grounds for cancellation of contract.

V. GENERAL TERMS & CONDITIONS

A. In accord with Section 2.2 – 4343.1 of the Code of Virginia, King William County does not discriminate against faith-based organizations in procuring goods or services and both the County and any contracted faith-based organization will comply with the provisions of that section.

B. During the performance of any contract issued pursuant to this proposal, the Contractor agrees as follows:

- 1. The Contractor will not discriminate against any employee or applicant for employment because of race, religion, color, sex, national origin, age, disability or other basis prohibited by state law related to employment, except where there is a bona fide occupational qualification reasonably necessary to the normal operation of the Contractor. The Contractor agrees to post in conspicuous places, available to employees and applicants for employment, notices setting forth the provisions of this nondiscrimination clause.

2. The Contractor, in all solicitations or advertisements for employees placed by or on behalf of the Contractor, will state that such Contractor is an equal opportunity employer.
3. Notices, advertisements and solicitations placed in accordance with federal law, rule or regulation shall be deemed sufficient for the purpose of meeting the requirements of this section.

The Contractor will include the provisions of the foregoing paragraphs 1, 2 and 3 in every subcontract or purchase order of over \$10,000, so that the provisions will be binding upon each subcontractor or vendor.

C. With the following exceptions, procurement documents are subject to the Virginia Freedom of Information Act:

1. Cost estimates relating to a proposed procurement transaction prepared by or for the County shall not be open to public inspection.
2. Proposals and proposal records shall be open to public inspection only after award of the contract. Any Offeror may be allowed to inspect the proposal or proposal records after proposal opening or after the evaluation and negotiation of proposals are completed, and prior to award, unless the County decides not to accept any proposals or not to accept any of the proposals and to reopen the contract.
3. Trade secrets or proprietary information submitted to the County are not subject to disclosure if requested by the person submitting such information prior to or upon submission of the data or other materials. Any such request must identify what is to be protected and state the reasons therefor.
4. Any inspection of procurement transaction records under this section shall be subject to reasonable restrictions imposed by the Purchasing Agent to insure security and integrity of the records.

D. By submitting a proposal, Offerors certify that they do not and will not, during the performance of an awarded contract, knowingly employ an unauthorized alien as defined in the Federal Immigration Reform and Control Act of 1986.

E. During the performance of and awarded contract, the Contractor agrees to (i) provide a drug-free workplace for the Contractor's employees; (ii) post in conspicuous places, available to employees and applicants for employment, a statement notifying employees that the unlawful manufacture, sale, distribution, dispensation, possession, or use of a controlled substance or marijuana is prohibited in the Contractor's workplace and specifying the actions that will be taken against employees for violations of such prohibition; (iii) state in all solicitations or advertisements for employees placed by or on behalf of the Contractor that the Contractor maintains a drug-free workplace; and (iv) include the provisions of the foregoing clauses in every subcontract or purchase order of over \$10,000, so that the provisions will be binding upon each subcontractor or vendor.

For the purposes of this paragraph, "drug-free workplace" means a site for the performance of work done in connection with a specific contract awarded to a contractor pursuant to this proposal, the employees of whom are prohibited from engaging in the unlawful manufacture, sale, distribution,

dispensation, possession or use of any controlled substance or marijuana during the performance of the contract.

F. Any business entity including those described in Subparagraph K of the Instructions to Offerors that enters into a contract shall not allow its existence to lapse or its certificate of authority or registration to transact business in the Commonwealth, if so required under Title 13.1 or Title 50, to be revoked or cancelled at any time during the term of the contract.

G. King William County (Federal I.D. #54-6001376) is exempt from Federal, State and local taxes. Taxes included on invoices will be deducted from the payment amount. Tax-exempt forms will be completed for a vendor upon request.

H. The Contractor agrees to indemnify, defend, and hold harmless King William County, its governing body, officers, employees, and insurance carriers, individually and collectively, from all losses, claims, suits, demands, expenses, subrogation, attorneys' fees, or actions of any kind or nature resulting from personal injury to any person (including bodily injury and death), or damage to any property, arising or alleged to have arisen out of Offeror's negligent acts, errors, omissions, related to the provision of services and/or products specified under the contract provided that such liability is not attributable to the County's sole negligence. The amount and type of insurance coverage requirements set forth herein, or lack thereof, will in no way be construed as limiting the scope of indemnity as stated in this paragraph.

I. It is understood and agreed between the parties herein that the County shall be bound hereunder only to the extent of the funds available, or which may hereafter become available for the purpose of this agreement, and the agreement will be contingent upon annual appropriations by the Board of Supervisors of King William County. Failure of the Board of Supervisors to appropriate adequate funds for the terms of this Contract shall result in the immediate cancellation of the Contract. There shall be no penalty should the Board fail to make annual appropriations for this contract.

CONTRACTOR DISCLOSURE:

Fred W. Pearson is proposed to work on the 2023 reassessment project. Mr. Pearson owns real estate in King William County. It is proposed the Virginia Department of Taxation review the values placed on the properties owned by Fred Pearson before final values for those properties are determined.

Timeline for 2019 (2023) Reassessment-Proposed Attachment A

2021

- RFP advertised July
- Questions due July 15th; addendum posted if necessary July 19th
- RFP due August 6th, 2021 at 3 PM
- Company chosen August/ September
- Field work starts in September/October. Reassessment office shall be staffed.

2022

- Monthly meetings held with Contractor, County Administrator, Finance, and Commissioner of the Revenue
- Interim draft of comprehensive sales study complete by January 30th. Reviewed by County and approved by February 28th.
- Fieldwork complete and assessments reviewed by September 16th
- Reassessment Notices mailed by October 1st
- Informal hearings by Contractor scheduled mid-October to early November
- Informal hearings by Contractor, in-person and in writing, held mid-October to early December
- Results of informal hearings mailed to homeowners by December 16th
- Reassessment complete by December 30st

2023

- Final Reassessment values effective January 1st, 2023
- Field work for fall/winter 2022 new construction through January
- Reassessment office staffed until January 13th, 2023
- Board of Equalization court-appointed January
- Commissioner of the Revenue change in assessment notices mailed in March for properties in land use with new values, and for fall/winter 2022 new construction
- Board of Equalization hearings February to April 1st
- Board of Supervisors hearings and set tax rate April/May

INSURANCE SPECIFICATIONS ATTACHMENT B

The intent of this insurance specification is to provide the coverage required and the limits expected for each type of coverage. With regard to the Automobile Liability and Commercial General Liability, the total amount of coverage can be accomplished through any combination of primary and excess/umbrella insurance. However, the total insurance protection provided for Commercial General Liability or for Automobile Liability, either individually or in combination with Excess/Umbrella Liability, must total \$1,000,000 per occurrence. This insurance shall apply as primary insurance with respect to any other insurance or self-insurance programs afforded the County of King William. The policies shall be endorsed to be primary with respect to the additional insured.

The successful Offeror shall carry Commercial General Liability Insurance in the amount specified below, including contractual liability assumed by the successful Offeror, and shall deliver a Certificate of Insurance together with necessary policy endorsements from carriers licensed to do business in the Commonwealth of Virginia. The Certificate shall show the County of King William named as an additional insured for the Commercial General Liability and Umbrella/Excess Liability coverage if such coverage is used to meet the specified amount of insurance. The contract includes the following indemnification agreement: "The Contractor agrees to indemnify, defend, and hold harmless King William County, it's governing body, officers, employees, and insurance carriers, individually and collectively, from all losses, claims, suits, demands, expenses, subrogation, attorneys' fees, or actions of any kind or nature resulting from personal injury to any person (including bodily injury and death), or damage to any property, arising or alleged to have arisen out of Offeror's negligent acts, errors, omissions, related to the provision of services and/or products specified under the contract provided that such liability is not attributable to the County's sole negligence."

The County makes no representation or warranty as to how the successful Offeror's insurance coverage responds or does not respond. Insurance coverages that are unresponsive to the above indemnification provisions do not limit the successful Offeror's responsibilities outlined in the contract.

Title 65.2 of the Code of Virginia requires every employer who regularly employs three or more full-time or part-time employees to purchase and maintain workers' compensation insurance. If you do not purchase a workers' compensation policy, a signed statement is required documenting that you are in compliance with Title 65.2 of the Code of Virginia.

LIMITS:

Worker's Compensation	State of Virginia Requirements (Note 3)
Commercial General Liability	\$1,000,000 per occurrence \$2,000,000 annual aggregate
Automobile Liability	\$1,000,000 per occurrence
Professional Liability (E/O)	\$1,000,000 per occurrence (If stated as being required in the Specific Terms & Conditions)

**PERFORMANCE BOND
ATTACHMENT C**

KNOW ALL MEN BY THESE PRESENTS, that

(Name of Contractor)

hereinafter called the Principal, a _____ (Corporation, Partnership or Individual) and

(Name of Surety)

(Address of Surety)

hereinafter called Surety, are held and firmly bound unto King William County, Virginia, hereinafter called Owner, in the penal sum of _____ Dollars, (\$ _____), in lawful money of the United States, for the payment of which sum well and truly to be made, we bind ourselves, successors, and assigns, jointly and severally, firmly by these presents.

THE CONDITION OF THIS OBLIGATION is such that whereas, the Principal entered into a certain Contract with the Owner, dated the day of _____, 20____, a copy of which is hereto attached and made a part hereof for the following:

NOW, THEREFORE, if the Principal shall well, truly and faithfully perform its duties, all the undertakings, covenants, terms, conditions, and agreements of said Contract during the original term thereof, and any extensions thereof which may be granted by the Owner, with or without notice to the Surety, and if he shall satisfy all claims and demands incurred under such Contract, and shall fully indemnify and save harmless the Owner from all costs and damages which it may suffer by reason of failure to do so, and shall reimburse and repay the Owner all outlay and expense which the Owner may incur in making good any default, then this obligation shall be void; otherwise to remain in full force and effect.

PROVIDED, FURTHER, that the said Surety, for value received hereby stipulates and agrees that no change, extension of time, alteration or addition to the terms of the Contract or to Work to be performed thereunder shall in any way affect its obligation on this Bond, and it does hereby waive notice of any such change, extension of time, alteration or addition to the terms of the Contract or to the Work.

PROVIDED, FURTHER, that no final settlement between the Owner and the Contractor shall abridge the right of any beneficiary hereunder, whose claim may be unsatisfied.

IN WITNESS WHEREOF, this instrument is executed in 4 counterparts each one of which shall be deemed original, this the day of _____, 20____.

ATTEST:

PRINCIPAL BY/TITLE SEAL

Print or type name signed above

WITNESS TO PRINCIPAL ADDRESS

ATTEST:

SURETY BY (ATTORNEY IN FACT) SEAL

Print or type name signed above

WITNESS AS TO SURETY ADDRESS

NOTE: Date of Bond must be as to date of Contract. If Contractor is Partnership, all partners should execute Bond.

**KING WILLIAM COUNTY
SAMPLE CONTRACT FOR CONSULTING SERVICES
ATTACHMENT D**

Agreement No. _____

This contract made and entered into this ____ day of _____, 2017 by and between the King William County Board of Supervisors, hereinafter referred to as "Board", which term shall be construed to include any officer, representative or agent having authority to represent or act for it in relation to any part of the subject of this Agreement and _____, hereinafter referred to as "Consultant".

WITNESSETH:

WHEREAS, the Board desires to engage the services of the Consultant in connection with _____ hereinafter referred to as the "Project"; and

WHEREAS, the Consultant has investigated and is aware of the requirements of the Project.

NOW, THEREFORE, for and in consideration of the mutual undertakings of the parties to this Contract, the Board and Consultant hereby covenant and agree, each with the other, that the Consultant shall provide services as an independent contractor in accordance with the terms and conditions of this Contract and the requirements of Exhibit(s). In the event of any conflict between the terms of this contract and similar terms included in any exhibit made a part thereof, the terms as stated in this contract shall control.

ARTICLE I: BASIC SERVICES

1.1 The Consultant shall enter upon the performance of this Contract with all diligence and dispatch, shall assiduously press to its complete performance and shall employ thoroughly competent, qualified and experienced personnel commensurate with the magnitude and intricacy of the work.

1.2 The Scope of Services to be furnished by the Consultant is detailed in Exhibit 1.

ARTICLE II: BOARD'S AND CONSULTANT'S RESPONSIBILITIES

2.1 The County Administrator or his designated representative shall be the liaison between the Board and the Consultant and is authorized to act in the Board's behalf.

2.2 The Consultant agrees to commence work within ten (10) calendar days from the date of the notice to proceed, which shall be issued at the sole discretion of the Board. Any work performed prior to receipt of the notice to proceed will not be eligible for compensation.

2.3 If so indicated in the attached Exhibit(s), the Consultant shall not proceed on any task until it has received specific written authorization from the Board to proceed with that task.

ARTICLE III: ADDITIONAL WORK

3.1 The Scope of Services defined in this Contract and Exhibit(s) may be increased and/or modified as the work progresses and/or as the Board deems such increase and/or modification necessary to satisfactorily complete the Project. However, the Consultant will not undertake any increase and/or modification without prior written approval and supplemental agreement from the Board.

3.2 No change in the character or extent of the work to be performed by the Consultant which affects the time or the compensation shall be made except by supplemental agreement in writing between the Consultant and Board.

3.3 In any case, where the Consultant believes extra compensation is due for work and services not covered by this Contract or Exhibit(s), Consultant shall promptly notify the Board, in writing, of Consultant's intention to make a claim for such extra compensation before Consultant begins the work on which the claim is based. Before commencing work or services on which the Consultant will base a claim for extra compensation, Consultant shall obtain the Board's approval in writing.

ARTICLE IV: PAYMENTS

4.1 As compensation for said services as a consultant and for all services set forth in the Exhibit(s), the Board agrees to pay the Consultant the sum of \$_____ for the services provided and the completion of the Project. The Contractor shall be paid within thirty days of receipt of invoice for verifiably completed parcels during the fieldwork stage of the project, less retainage of 5%. Final payment of the retainage will be made when Board of Equalization has finalized its proceedings on the reassessment or by May 2019.

4.2 Payments to the Consultant will be made periodically but shall not be required more frequently than monthly in proportion to the work performed and shall be based on work completed to date. In no case will a payment for less than \$1,500 be honored other than for the completion of a specific task.

4.3 All contractual claims, whether for money or other relief, shall be submitted in writing no later than sixty (60) days after final payment; however written notice of the Consultant's intention to file such claim shall have been given at the time of the occurrence or the beginning of the work upon which the claim is based. All claims shall be made in accordance with Virginia Code Section 15.2-1243 et seq. and the Board shall render a final decision in writing with regard to any such claim, not later than sixty (60) days subsequent to receipt of any such claim in writing by the County Administrator.

ARTICLE V: ERRORS AND OMISSIONS

Any reports, plans, designs, or other items needed for a complete job, shall be checked for accuracy by the Consultant before submission of final documents. The Consultant will be required without additional compensation to correct any errors or omissions in any documents submitted and to clarify any ambiguities which may be discovered.

ARTICLE VI: ABANDONMENT AND TERMINATION

6.1 The Board reserves the right to terminate this Contract at any time for any reason upon written notice to the Consultant. If the Board shall terminate the services herein mentioned, the Consultant shall immediately deliver to the Board all data, completed or partially completed through both an electronic copy and a hard copy, and these shall be the property of the Board. If this Contract is terminated for any reason not the fault of Consultant, the earned value of the work performed shall be based upon the time actually devoted by the

Consultant and Consultant's personnel to performance of the services specified in this Contract up to the date of the termination, and payment therefore shall be made at the rate set forth in the Exhibit(s). Such payment shall be made to the Consultant as a final payment in full settlement for the services hereunder or by supplemental agreement hereto. In the event of a termination for breach or default by Consultant, Board shall have access to all remedies available in equity or at law. The Board shall give ten (10) days' written notification to the Consultant of any termination.

6.2 This Contract may be terminated by the Consultant upon ten (10) days' written notice in the event of substantial failure by the Board to perform in accordance with the terms hereof through no fault of the Consultant. In the event of such termination by Consultant, the provisions of paragraph 6.1 immediately hereinabove shall apply mutatis mutandis, except that Consultant shall be entitled to no further or other compensation, either hereunder or by way of a claim for damages growing out of this Contract.

6.3 All completed documents are the property of the Board, and the Board may use any or all of said items at any time, either in connection with the project to which they are applicable or in connection with any future or additional project, whether or not owned or to be owned by the Board, or for any other purpose for which the Board may wish to use said items; provided, however, that the ownership of said items by the Board and the unlimited freedom to use them for any purpose in the future shall not deprive the Consultant of the right to use the documents for any purpose within Consultant's discretion in the future. During the performance of the services herein provided, the Consultant shall be responsible for any loss or damage to the documents, data or other pertinent information while in Consultant's possession, and any such loss or damage shall be restored at Consultant's expense. All documents shall strictly conform to all laws, statutes and ordinances, all applicable rules and regulations, and the methods and procedures of all government boards, bureaus or agencies having jurisdiction over the Consultant's services.

ARTICLE VII: MISCELLANEOUS

7.1 Multiple Copies - This Contract may be executed in any number of counterparts, each of which shall be deemed an original.

7.2 Severability of Clauses - It is agreed that the illegality or invalidity of any term or provision of this Contract shall not affect the validity of the remainder of this Contract, and it shall remain in full force and effect as if such illegal or invalid term or provisions were not contained herein.

7.3 The Consultant shall not engage the services of any person in the present employ of the Board for any work covered by this Contract without written permission of the Board.

7.4 The Consultant agrees to indemnify, defend, and hold harmless King William County, its governing body, officers, employees, and insurance carriers, individually and collectively, from all losses, claims, suits, demands, expenses, subrogation, attorneys' fees, or actions of any kind or nature resulting from personal injury to any person (including bodily injury and death), or damage to any property, arising or alleged to have arisen out of Consultant's negligent acts, errors, omissions, related to the provision of services and/or products specified under the contract provided that such liability is not attributable to the County's sole negligence. Compliance by the Consultant with the insurance provisions hereof shall not relieve Contractor from liability under this provision.

Should Consultant or Consultant's employers, servants or agents use any of Board's equipment, tools, employees, or facilities, such will be gratuitous and Consultant shall release the Board, its officers, agents or employees from and indemnify and save harmless Owner from and against any claims for personal injuries, including death, arising out of the use of any such equipment, tools, employees, or facilities, whether or not based upon the condition thereof

or any alleged negligence of Board in permitting the use thereof.

7.5 In no event shall the Consultant's duties to defend, save harmless and indemnify the Board hereunder be enforceable after the expiration of five (5) years from the date of completion of the services included in the Contract; provided, however, should any claim as is described in the immediately preceding paragraph relate to services performed by the Consultant after the date of substantial completion, then from the date of the performance of any such services, whichever is later.

7.6 Board and the Consultant each binds itself, its partners, successors, assigns and legal representatives to the other party to this Contract and to the partners, successors, assigns and legal representatives of such other party in respect of all covenants of this Contract. Neither the Board nor the Consultant shall assign, sublet or transfer its interest in this Contract without the written consent of the other.

7.7 The Consultant shall comply with the provisions of the laws of the Commonwealth of Virginia and all federal and local statutes, ordinances and regulations that are applicable to the performance of this Contract, and procure all necessary licenses and permits.

7.8 The Consultant shall maintain accounts and records, including personnel, property and financial records, adequate to identify and account for all costs pertaining to the Contract and such other records as may be deemed necessary by the Board to assure proper accounting for all project funds, both federal and non-federal shares. These records will be made available for audit purposes to the County or any authorized representative, and will be retained for three (3) years after the expiration of this Contract unless permission to destroy them is granted by the County.

7.9 Unless otherwise agreed, this Contract shall be performed within the time schedule established pursuant to Section 1.2. Time shall be of the essence as to this Contract and all supplemental agreements, except that reasonable additional time may be allowed for increased or additional work.

7.10 The contract shall consist of this signed contract together with any Exhibits identified herein and the following component parts, all of which are made a part hereof as if set out in full:

1. Request for Proposals No. _____ including all attachments thereto.
2. Consultant's Proposal dated _____
3. Performance Bond
4. Certificate of Insurance
5. Notice to Proceed
6. Change Orders/Modifications (if any)

ADDENDA:

No. _____, dated _____
No. _____, dated _____
No. _____, dated _____
No. _____, dated _____

These constitute the entire agreement between the parties and no condition or provision, whether oral or written, in any previous communication by either of the parties or any prior agreement or other understanding between them shall be of any effect, anything in such communication or agreement to the contrary notwithstanding.

IN WITNESS WHEREOF, the Consultant and the Board have executed this Agreement pursuant to proper authority and in the manner appropriate to each.

Consultant:

King William County Board of Supervisors:

By: (Signature)

By: Steve Hudgins

Title: County Administrator
Printed Name/Title

Company Name

Approved as to form:

Department Approval:

County Attorney

Commission of the Revenue

RESUMES

FRED W. PEARSON

Co-Owner/Manager for Pearson's Appraisal Services, Inc / Reappraisal Inc

Certified General Real Estate Appraiser

CERTIFICATION

Certified Virginia General Appraiser, Virginia Real Estate Appraiser Board

Certified Virginia Professional Assessor, Virginia Department of Taxation

Certified Ad Valorem Appraiser, North Carolina Dept. of Revenue

Certified Georgia Real Property Appraiser, Georgia Real Estate Commission

Certified North Carolina General Appraiser, North Carolina Appraisal Board

Certified Delaware General Appraiser

EXPERIENCE

For the past 38 years, co-owner and manager of Pearson's Appraisal Service, successfully managed and supervised reassessments and revaluations for Virginia and North Carolina municipalities including the following:

Appomattox County, VA
Amelia County, VA
Augusta County, VA
Bland County, VA
Buckingham County, VA
Brunswick County, VA
Caroline County, VA
Charlotte County, VA
City of Buena Vista, VA
City of Covington, VA
City of Emporia, VA
City of Fredericksburg, VA
City of Norton, VA
City of Winchester, VA
Cumberland County, VA
Dickenson County, VA

Essex County, VA
Fauquier County, VA
Fluvanna County, VA
Giles County, VA
Greene County, VA
Greensville County, VA
Lee County, V

Beaufort County, NC
Chatham County, NC
Clay County, NC

Durham County, NC
Edgecombe County, NC
Granville County, NC
Johnston County, NC
Madison County, NC
Macon County, NC
Nash County, NC
Onslow County, NC
Pasquotank County, NC

Perquimans County, NC
Sampson County, NC
Swain County, NC
Stanly County, NC
Westmoreland County, VA.
Wise County, NC
Wythe County, NC

City of Seaford, DE
Town of Dagsboro, DE

Lunenburg County, VA
Madison County, VA
Northampton County, VA
Northumberland County, VA
Nottoway County, VA
Powhatan County, VA
Prince Edward County, VA
Richmond County, VA
Russell County, VA
Smyth County, VA
Sussex County, VA
Washington County, VA

Town of Milton, DE
Town of Millsboro, DE
Town of Ocean View, DE
Town of Delmar, DE
Town of Bethany Beach, DE

Prior to incorporation of Pearson's Appraisal Service, appraisal experience includes working for the Virginia Department of Taxation.

EDUCATION

B.S. Business Administration, Atlantic Christian College, Wilson, North Carolina
Completed Courses 1, 2 and 3 under the supervision of the IAAO.

REFERENCES

Dr. Mark J. Matney
Washington County Commissioner of Revenue
Washington County, Virginia
(276) 676-6501
mmatney@washcova.com

Julie Phillips
Commissioner of Revenue
Cumberland County, Virginia
(804) 492-4288

Ken Joyner
Tax Assessor
Mecklenburg County, North Carolina
(704) 562-8106

Todd E. Thomas
Commissioner of the Revenue
Northumberland County, VA
(804) 580-4600
tthomas@co.northumberland.va.us

NUMBER OF YEARS OF APPRAISAL EXPERIENCE

38 Years

RANDALL CARTER WILLIS

Project Supervisor/Professional Assessor

EXPERIENCE

Presently working on the City of Emporia, VA 2022 Reassessment .

Previous Job assignments through Pearson's Appraisal Service:

Supervised the production of the Cumberland County 2020 reassessment.

Supervised the production of the City of Emporia, VA 2020 reassessment.

Project supervisor for Charlotte County, VA 2019/20 reassessment.

Project supervisor for Fluvanna County, VA 2019/2020 reassessment.

Granville County, North Carolina's 2018 revaluation.

Supervised the production of Nottoway County, Virginia 2018 reassessment.

Supervised the production of Amelia County, Virginia 2018, 2012 and 2006 property reassessment.

Supervised the reassessment project for Lunenburg County, Virginia 2018, 2012 and 1998 property reassessment.

Assisted with the appraisal work for Vance County, North Carolina 2016, and 2007 revaluation

Supervised the production of Charlotte County, Virginia 2013 property reassessment.

Supervised the production of Cumberland County, Virginia 2014 property reassessment.

Supervised the production of Powhatan County, Virginia 2012, 2010, and 2008 reassessment.

Served as the Project Supervisor/Assessor for the City of Emporia, Virginia property reassessment effective for the tax years of 2000, and 2002.

Supervised the production of Charles City County, Virginia property reassessment effective for the tax year 2001.

Supervised the completion of the revaluation project for Vance County, North Carolina effective for the tax year 2000.

Supervised the reassessment project for Brunswick County, Virginia effective for the tax year 2012, and 2000.

Supervised the reassessment project for Charles City County Virginia 1997 reassessment.

Served as the appraiser for the City of Franklin, Virginia 1996, and 1994 reassessment.

Assisted in the appraisal of all real property for the production of Northampton County, North Carolina 2011, and 1996 computerized property revaluation.

Assisted in the appraisal of all real property for both Brunswick and Nottoway County, Virginia 1994 property reassessments.

Expert witness in Circuit Court for real estate appraisals.

CERTIFICATION

Certified by the N.C. Dept. of Revenue as an Ad Valorem Tax Appraiser

EDUCATION

Southside Virginia Community College, Virginia, 1992/1993

Principles of Real Estate

Mosely-Flint School of Real Estate Richmond, VA
Basic Appraisal Fundamentals
Advanced Residential Appraisal
Appraisal Practices and Regulations
Attended 4-day VAAO Educational Seminar, July 2002 and July 2003
Periodic Board of Equalization Training Sessions

REFERENCES

Naisha Carter
Commissioner of the Revenue
Charlotte County, VA
P.O. Box 308
205 David Bruce Avenue
Charlotte Court House, VA 23923
(434) 542-5546
Npridgen@charlotteva.com

Julie Phillips
Commissioner of the Revenue
Cumberland County, VA
1 Courthouse Circle
P.O. Box 77
Cumberland, VA 23040
(804) 492-4280
Jphillips@cumberlandcounty.virginia.gov

Denise Smith
Commissioner of the Revenue
Charles City County, Va.
P.O. Box 7
Charles City, VA 23030
(804)652-2162
Dsmith@co.charles-city.va.us

Elizabeth Hamlett
Commissioner of the Revenue
County of Lunenburg, VA
11512 Courthouse Road, Ste 101
Lunenburg, VA 23952
(434) 696-2516
Lhamlett@lunenburgva.net

YEARS OF EXPERIENCE

29 Years

DAVID BALDWIN

Field Appraiser

EXPERIENCE

Presently Pearson's Appraisal Service Inc., commercial review:

Rockingham County, Virginia's 2021 Office Review Commercial Valuations

Previous Pearson's Appraisal Service Inc., field data collection includes:

Pasquotank County, Virginia's 2022 Reassessment

Hoke County, North Carolina 2022 Revaluation

Charles City County, Virginia 2022 Reassessment

CERTIFICATIONS

IAAO Course 101 – Fundamentals of Real Property Appraisal: May 24th 2021

EDUCATION

Bachelor of Science

Biological and Agricultural Engineering Technology

North Carolina State University

(August 2014-May 2019)

REFERENCES

Patrice Stewart

Tax Administrator

Pasquotank County Tax Department

P.O. Box 586

Elizabeth City, NC 27907

stewartp@co.pasquotank.nc.us

(252) 338-5169

Denise Smith

Commissioner of the Revenue

Charles City, VA

dsmith@co.charles-city.va.us

(804) 652-2161

Sharon Cooper

Real Estate Appraisal

Pasquotank County

P.O. Box 586

Elizabeth City, NC 27907

coopers@co.pasquotank.nc.us

EXPERIENCE

1 year

JOSEPH HARPER
Field Appraiser

EXPERIENCE

Presently Pearson's Appraisal Service Inc.,

Charlotte County, Virginia's 2021 New Construction

Previous Pearson's Appraisal Service Inc., field data collection production includes:

Westmoreland County, Virginia's 2022 Reassessment

Rockingham County, Virginia's 2022 Reassessment

Charles City County, Virginia's 2021 Reassessment

References

William K. Hoover
Commissioner of the Revenue
Westmoreland, VA
whoover@westmoreland-county.org
(804) 493-0113

Denise Smith
Commissioner of the Revenue
Charles City, VA
dsmith@co.charles-city.va.us
(804) 652-2161

Years of Experience

1 Year

MIRANDA BERRY

Administrative Assistant/Data Entry

EXPERIENCE***Presently Pearson's Appraisal Service Inc., Office***

Human Resources – Payroll

Accounts Payable

Accounts Receivable

Presently Pearson's Appraisal Service, Inc. Data Entry assisting with the following projects:

Greene County, VA 2021 Reassessment

Charles City, VA 2021 New Construction

Westmoreland, VA 2022 Reassessment

Previous Work Experience

King William County, VA – Deputy Commissioner of the Revenue 2019-2020

Essex Bank – Financial Service Associate 2018 - 2019

EVB/Sonabank – Financial Service Advisor II 2013 - 2018

BB&T – Teller 2011-2012

REFERENCES

Denise Smith

Commissioner of the Revenue

Charles City, VA

dsmith@co.charles-city.va.us

(804) 652-2161

William K. Hoover

Commissioner of the Revenue

Westmoreland, VA

whoover@westmoreland-county.org

(804) 493-0113

Larry V. Snow

Commissioner of the Revenue

Greene County, VA

lsnow@gcva.us

(434) 985-5211

YEARS OF EXPERIENCE

2 Years

CLIENT LIST

CURRENT REAPPRAISALS UNDER PROGRESS FOR 2023

Northampton County, NC
Kathy S. Butler
Interim Tax Administrator
Northampton County, NC
104 Thomas Bragg Street
Jackson, NC 27845
(252) 534-1309
Kathy.butler@nhcnc.net
22,500 Parcels

CURRENT REAPPRAISALS UNDER PROGRESS FOR 2022

Hoke County, NC
Jennie Gibson
Tax Assessor
Tax Assessor's Office
P.O. Box 1557
Raeford, NC 28376
(910) 875-8751
Jgibson@hokecounty.org
26,000 Parcels

Pasquotank County, NC
Patrice Stewart
Tax Administrator
P.O. Box 586
Elizabeth City, NC 27907
(252) 338-5169
Stewartp@co.pasquotank.nc.us
22,000 Parcels

Westmoreland County, VA
Carol Gawen
Commissioner of the Revenue
Commissioner of the Revenue's Office
111 Polk Street
P.O. Box 68
Montross, VA 22520
(804) 493-0113
Cgawen@westmoreland-county.org
30,000 Parcels

Grayson County, VA
Larry Bolt
Commissioner of the Revenue
129 Davis Street
P.O. Box 126
Independence, VA 24348
(276) 773-2381
lbolt@graysoncountyva.gov
17,624 Parcels

Rockingham County, VA
Dan Cullers
Commissioner of the Revenue
20 E. Gay Street
Harrisonburg, VA 22802
(540) 564-1132
48,000 Parcels

Sussex County, VA
Ellen Boone
Commissioner of the Revenue
Commissioner of the Revenue's Office
P.O. Box 1398
Sussex, VA 23884
(434) 246-1022
e.boone@sussexcountyva.gov
9,600 Parcels

Jones County, NC
Rachel Shaver
Tax Administrator/Assessor
418 Hwy 58 N.,
Trenton, NC 28585
(252) 448-2546
rshaver@jonescountync.gov
9,500 Parcels

Charles City County, VA
Denise B. Smith
Commissioner of the Revenue
Commissioner of the Revenue's Office
P.O. Box 7
Charles City, VA 23030
dsmith@co.charles-city.va.us
(804) 652-2161
6,700 Parcels

CONTRACTED JOBS WITH COUNTIES NOT CURRENTLY COMPLETING REVALUATIONS

Hertford County, NC
Listing New Construction and Data Conversion
Sandy Brock, Tax Assessor
Tax Assessor's Office
PO Box 526
Winton, NC 27986
Sandy.brock@hertfordcountync.gov
(252) 358-7810

Northampton County, NC
Listing New Construction effective for tax year 2020
Kathy Butler, Interim Tax Administrator
104 Thomas Bragg Drive
Jackson, NC 27845
Kathy.butler@nhcnc.net
(252) 534-1309

Duplin County, NC
Assisting with the 2022 Revaluation
Gary M. Rose, Duplin County Tax Administrator
P.O. Box 968
Kenansville, NC 28349
Garyr@duplincountync.com
(910) 296-2110

Greene County, VA
Listing New Construction
Larry V. Snow
Commissioner of the Revenue
Commissioner of the Revenue's Office
P.O. Box 438
Stanardsville, VA 22973
(434) 985-5211

Fluvanna County, VA
Listing New Construction
Andrew M. "Mel" Sheridan Jr.
Commissioner of the Revenue
P.O. Box 124
Palmyra, VA 22963
msheridan@co.fluvanna.va.us
(434) 591-1940

Nottoway County, VA
Listing New Construction
Christy A. Hudson
Commissioner of the Revenue
P.O. Box 5
Nottoway, VA 23955
chudson@nottoway.org
(434) 645-9317

Amelia County, VA
Listing New Construction
Taylor Harvie III
Amelia County Administrator
P.O. Box A
Amelia, VA 23002
Taylor.harvie@ameliacova.com
(804) 561-3039

Washington County, VA
Listing New Construction
Dr. Mark J. Matney
1 Government Center Place, Suite C
Abingdon VA, 24210
(276) 676-6501
mmatney@washcova.com

Charlotte County, VA
Listing New Construction
Naisha P. Carter
Commissioner of the Revenue
P.O. Box 308
Charlotte Court House, VA 23923
(434) 542-5564
ncarter@charlottecountyva.gov

CURRENT REAPPRAISALS UNDER PROGRESS FOR 2021

Greene County, NC
Becky R. Sutton
Tax Administrator
229 Kingold Blvd., Suite B
Snow Hill, NC 28580
Becky.sutton@greencountync.gov
(252) 747-3615
14,000 Parcels

Fluvanna County, VA
Andrew M. Sheridan, Jr.
Commissioner of the Revenue
Fluvanna County Commissioner of the Revenue Office
P.O. Box 124
Palmyra, VA 22963
Msheridan@co.fluvanna.va.us
(434) 591-1940
16,400 Parcels

Washington County, VA
Dr. Mark J. Matney
Commissioner of the Revenue
Washington County Commissioner of the Revenue Office
1 Government Center Place
Suite C
Abingdon, VA 24210
Mmatney@washcova.com
(276) 676-6501
39,500 Parcels

City of Buena Vista, VA
Mar Vita Flint
Commissioner of the Revenue
2039 Sycamore Avenue
Buena Vista, VA 24416
Commissioner@bvcity.org
(540) 261-8611
3,500 Parcels

City of Winchester, VA
Celeste Broadstreet
Financial Services Director/Real Estate Administrator
15 North Cameron Street
Winchester, VA 22601
Celeste.Broadstreet@winchesterva.gov
(540) 667-2048
10,000 Parcels

Person County, NC
Philip Christy, Appraisal Manager
P.O. Box 1116
Roxboro, NC 27573
pchristy@personcountync.gov
(336) 597-1721
27,500 Parcels

Greene County, VA
Larry Snow
Commissioner of the Revenue
P.O. Box 438
Stanardsville, VA 22973
Lsnow@gcva.us
(434) 985-5211
12,000 Parcels

REAPPRAISALS/REASSESSMENTS FOR

Cumberland County, VA
Julie A. Phillips, MCR
Commissioner of the Revenue
P.O. Box 77
Cumberland, VA 23040
Jphillips@cumberlandcounty.virginia.gov
(804) 492-4280
10,000 Parcels

City of Norton, VA
Judy Miller
Commissioner of the Revenue
P.O. Box 347
Norton, VA 24273
Judym@nortonva.org
(276) 679-0031
2,700 Parcels

City of Emporia, VA
Joyce Prince
Commissioner of the Revenue
P.O. Box 956
Emporia, VA 23847
J.prince.cor@ci.emporia.va.us
(434) 634-5405
2,500 Parcels

Giles County, VA
Lisa J. Corell
Commissioner of the Revenue
130 N. Main Street
Pearisburg, VA 24134
Lcorell@gilescounty.org
(540) 921-3321
15,000 Parcels

Smyth County, VA
Jeff Richardson
Commissioner of the Revenue
Commissioner of Revenue's Office
109 West Main Street, Suite G011
Marion, VA 24354
Commissioner@smythcounty.org
(276) 782-4040 x1
22,000 Parcels

Bland County, VA
Cindy Wright
Commissioner of the Revenue
612 Main Street, Suite 102
Bland, VA 24315
Cwright@bland.org
(276) 688-4291
7,500 Parcels

Greensville County, VA
Martha S. Swenson
Commissioner of the Revenue
1781 Greensville County Circle, Room 132
Emporia, Virginia 23847
Miss.cor@greensvillecountyva.gov
(434) 348-4227
7,500 Parcels

Montgomery County, NC
Vicki Maness, Tax Assessor
102 East Spring St, 2nd Floor
Troy, NC 27371
Vmaness@montgomerycountync.com
(910) 947-2255
18,000 Parcels

Madison County, NC
Lori Ray
Tax Administrator
Tax Administrator's Office
5707 U.S. Highway 25/70, Room 25
Marshall, NC 28753
Lray@madisoncountync.gov
(828) 649-3402
22,500 Parcels

City of Covington, VA
Cathy Kimberlin
Commissioner of the Revenue
333 W. Locust Street
Covington, VA 24426
Ckimberlin@covington.va.us
(540) 965-6352
5,400 Parcels

REAPPRAISALS/REASSESSMENTS FOR 2019

Fluvanna County, VA
Andrew M. (Mel) Sheridan
Commissioner of the Revenue
P. O. Box 124
Palmyra, VA 22963
Msheridan@fluvannacounty.org
(434) 591-1940
16,300 Parcels

Augusta County, VA
W. Jean Shrewsbury
Commissioner of the Revenue
P. O. Box 959
Verona, VA 24482
Jshrewsbury@co.augusta.va.us
(540) 245-5640
39,000 Parcels

Johnston County, NC
Dennis Woodward
Real Estate Supervisor
P. O. Box 368
Smithfield, NC 27577
(919) 989-5130
Also performed 1995 and 2011 revaluations
95,000 Parcels

Sampson County, NC
Jim Johnson
Tax Administrator
P. O. Box 1082
Clinton, NC 28329
Jjohnson@sampsonnc.com
(910) 592-8146 x5227
Also performed 2011, 2003 & 1995 Revaluations
50,000 Parcels

Hertford County, NC
Sandy Brock
Tax Assessor
Tax Assessor's Office
115 Justice Drive, Suite 4
Winton, NC 27986
(252) 358-7810
16,000 Parcels

Charlotte County, VA
Naisha P. Carter
Commissioner of the Revenue
P.O. Box 308
Charlotte Court House, VA 23923
(434) 542-5564
ncarter@charlottecountyva.gov
13,438 Parcels

Russell County, VA
Lonzo Lester
Russell County Administrator
137 Highland Dr.
Lebanon, VA 24266
(276) 889-8000
25,077 Parcels

City of Winchester, VA
Celeste Broadstreet
Real Estate Administrator
15 North Cameron St
Winchester, VA 22601
Celeste.broadstreet@winchester.gov
(540) 667-2048
10,000 Parcels

Greene County, VA
Larry Snow
Commissioner of the Revenue
Commissioner of the Revenue's Office
P.O. Box 438
Stanardsville, VA 22973
Lsnow@gcva.us
(434) 985-5211
12,000 Parcels

REAPPRAISALS/REASSESSMENTS FOR 2018

Charles City County, VA
Denise B. Smith
Commissioner of the Revenue
Commissioner of the Revenue's Office
P. O. Box 7
Charles City, VA 23030
Dsmith@co.charles-city.va.us
(804) 652-2161

Beaufort County, NC
Bobby Parker, Tax Administrator
Tax Administrator's Office
P. O. Box 160
Washington, NC 27889
(252) 940-6152
Bobbyparker@co.beaufort.nc.us
45,000 Parcels

Granville County, NC
Sharon Brooks-Powell, Tax Administrator
P. O. Box 219
Oxford, NC 27565
Sharon.powell@granvillecounty.org
(919) 603-1317
35,000 Parcels

Amelia County, VA
Taylor Harvie III
Amelia County Administrator
P. O. Box A
Amelia, VA 23002
Taylor.harvie@ameliacova.com
(804) 561-3039
9,500 Parcels

Brunswick County, VA
Camilla Clayton-Bright
Commissioner of the Revenue
Commissioner of the Revenue's Office
P. O. Box 669
Lawrenceville, VA 23868
Ccbbright@brunswickco.com
(434) 848-2313
17,000 Parcels

Lunenburg County, VA
Liz Y. Hamlett
Commissioner of the Revenue
Commissioner of the Revenue's Office
11512 Courthouse Rd, Ste 101
Lunenburg, VA 23952
Lhamlett@lunenburgva.net
(434) 696-2516
12,400 Parcels

Nottoway County, VA
Christy Hudson
Commissioner of the Revenue
Commissioner of the Revenue's Office
P.O. Box 5
Nottoway, VA 23955
Chudson@nottoway.org
(434) 645-9317
16,000 Parcels

Sussex County, VA
Ellen Boone
Commissioner of the Revenue
Commissioner of the Revenue's Office
P.O. Box 1398
15074 Courthouse Rd
Sussex, VA 23884
(434) 249-1024
9,500 Parcels

Anson County, NC
Larry Newton
Tax Assessor
Tax Assessor's Office
101 S. Greene St
Wadesboro, NC 28170
(704) 994-3290

REAPPRAISALS/REASSESSMENTS FOR 2017

Orange County, NC
Director of Revenue
228 S. Churton St., Ste 200
Hillsborough, NC 27278
(919) 245-2100
54,800 Parcels

Hyde County, NC
Linda Basnight
Tax Administrator
Tax Assessor's Office
P.O. Box 279
Swan Quarter, NC 27885
(252) 926-4188
8,532 Parcels

Warren County, NC
John Preston
Tax Administrator's Office
117 S. Main St.
Warrenton, NC 27589
(252) 257-4158
johnpreston@warrencountync.gov
15,000 Parcels

Wythe County, VA
Faye H. Barker
Commissioner of the Revenue
Commissioner of the Revenue's Office
101 Wythe County Courthouse
Wytheville, VA 24382
(276) 223-6018
20,000 Parcels

City of Winchester, VA
Celeste Broadstreet
Financial Services Director/Real Estate Administrator
15 North Cameron St
Winchester, VA 22601
Celeste.Broadstreet@winchesterva.gov
(540) 667-2048
10,000 Parcels

Chatham County, NC
Karen Jones
Tax Assessor
Tax Assessor's Office
P.O. Box 908
Pittsboro, NC 27312
(919) 542-8250
42,000 Parcels

Nash County, NC
Doris Sumner
Tax Administrator's Office
120 W. Washington St. Suite 2058
Nashville, NC 27815
(252) 459-9815
52,000 Parcels

Vance County, NC
Porcha C. Brooks
Tax Administrator
Tax Administrator's Office
122 Young St, Suite E
Henderson, NC 27536
(252) 738-2040
22,000 Parcels

Greene County, VA
Larry Snow
Commissioner of the Revenue
Commissioner of the Revenue's Office
P.O. Box 438
Stanardsville, VA 22973
Lsnow@gcva.us
(434) 985-5211
12,000 Parcels

REAPPRAISALS/REASSESSMENTS FOR 2016

Westmoreland County, VA
Norm Risavi
County Administrator
P.O. Box 1000
Montross, VA 22520
(804) 493-0130
30,000 Parcels

Perquimans County, NC
Bill Jennings
P.O. Box 7
Herford, NC 27944
(252) 426-7010
14,500 Parcels

Wake County, NC
Assisting Tax Office with New Construction, Revaluation and Hearings
Marcus Kinrade
Tax Administrator
(919) 856-7115
350,000 Parcels

REAPPRAISALS/REASSESSMENTS FOR 2015

Camden County, NC
2015 Walk-Around Revaluation
Lisa Anderson
Tax Administrator
Tax Administrator's Office
P.O. Box 125
Camden, NC 27921
Landerson@camdencountync.gov
(252) 338-1919 x 225
7,241 Parcels

Greene County, VA
Larry Snow
Commissioner of the Revenue
P.O. Box 438
Stanardsville, VA 22973
Lsnow@gcva.us
(434) 985-5211
12,000 Parcels

Patrick County, Virginia
Janet Rorrer
Commissioner of the Revenue
P.O. Box 367
Stuart, VA 24171
Jrorrer@co.patrick.va.us
(276) 694-7131
20,000 Parcels

Mecklenburg County, NC
Performing a Review of the County's 2011 Revaluation and Audit of the Tax Assessor's Office
Ken Joyner
P.O. Box 32728
Charlotte, NC 28232
Ken.joyner@MecklenburgCountyNC.gov
(704) 336-2606
365,000 Parcels

City of Winchester, VA
Celeste Broadstreet
Financial Services Director/Real Estate Administrator
15 North Cameron Street
Winchester, VA 22601
Celeste.Broadstreet@winchesterva.gov
(540) 667-2048
10,000 Parcels

REAPPRAISALS/REASSESSMENTS FOR 2014

Chowan County, NC
Melissa Radke
Chowan County Tax Department
P.O. Box 1030
Edenton, NC 27932
(252) 482-8486
13,000 parcels

Northumberland County, VA
E. Luttrell Tadlock
County Administrator
County Administrator's Office
P.O. Box 129
Heathsville, VA 22473
Ltadlock@co.northumberland.va.us
(804) 580-7666
19,100 Parcels

Pasquotank County, NC
Patrice Stewart
Tax Administrator
(252) 338-5169
21,748 Parcels

Cumberland County, VA
Julie Phillips
Commissioner of the Revenue
Commissioner of the Revenue's Office
P.O. Box 77
Cumberland, VA 23040
Jphillips@cumberlandcounty.virginia.gov
(804) 492-4280
6200 Parcels

REAPPRAISALS/REASSESSMENTS FOR 2013

Charlotte County, VA
Ms. Naisha Pridgen Carter
Commissioner of the Revenue
Commissioner of the Revenue's Office
P.O. Box 308
205 David Bruce Ave
Charlotte Court House, VA 23923
Npridgen@charlotteva.com
(434) 542-5546

Greene County, VA
Larry Snow
Commissioner of the Revenue
Commissioner of the Revenue's Office
P.O. Box 438
Stanardsville, VA 22973
Lsnow@gcva.us
(434) 985-5211
12,000 Parcels

Madison County, VA
Jack Hobbs
County Administrator
County Administrator's Office
P. O. Box 705
Madison, VA 22727
Jhobbs@madisonco.virginia.gov
(540) 948-7500 x 100

Person County, NC
Phillip Christy
Tax Office/Appraisals
P.O. Box 1116
Roxboro, NC 27573
Pchristy@personcountync.gov
(336) 597-1721
Wilkes County, NC
Alex Hamilton
Tax Administrator
110 North St
Wilkesboro, NC 28697
(336) 651-7301

REAPPRAISALS/REASSESSMENTS FOR 2012

Bertie County, NC
Jodie Rhea
Tax Administrator
Tax Administrator's Office
P.O. Box 527
106 Dundee St
Windsor, NC 27983
Jodi.rhea@bertie.nc.gov
(252)794-5310
18,600 Parcels

Brunswick County, VA
Camilla Clayton-Bright
Commissioner of the Revenue
Commissioner of the Revenue's Office
P.O. Box 669
Lawrenceville, VA 23868
(434) 848-2313
15,600 Parcels

City of Fredericksburg, VA
Lois B. Jacob
Commissioner of the Revenue
Commissioner of the Revenue's Office
P.O. Box 644
Fredericksburg, VA 22404
(540) 372-1004
9,000 Parcels

King & Queen County, VA
Kelly N. Lumpkin
Commissioner of the Revenue
Commissioner of the Revenue's Office
P.O. Box 178
King and Queen C.H., VA 23085
(804) 785-5976
7,400 Parcels

Lunenburg County, VA
Liz Hamlett
Commissioner of the Revenue
Commissioner of the Revenue's Office
11512 Courthouse Rd, Ste 101
Lunenburg, VA 23952

Lhamlett@lunenburgva.net
(434) 696-2516
12,000 Parcels

Mecklenburg County NC
Ken Joyner
P.O. Box 36819
Charlotte, NC 28236
Ken.joyner@mecklenburgcountync.gov
(980) 314-4226
381,000 Parcels

AGENDA ITEM 6.a.

Motion to Convene Closed Meeting

CLOSED MEETING MOTIONS

- ☐ **PERSONNEL** – In accordance with Section 2.2-3711 (A)(1) of the Code of Virginia, I move that the Board of Supervisors convene in Closed Meeting to consider a personnel matter involving the (choose from below):

☐ 1. appointment of individuals to Boards and Commissions.

☐ 2. interview of a prospective candidate for employment.

(or the)

☐ 3. Employment

☐ 6. Promotion

☐ 9. Salary

☐ 4. Assignment

☐ 7. Performance

☐ 10. Discipline

☐ 5. Appointment

☐ 8. Demotion

☐ 11. Resignation

of a specific public officer / appointee / employee.

- ☐ **PUBLIC PROPERTY** – In accordance with Section 2.2-3711 (A)(3) of the Code of Virginia, I move that the Board of Supervisors convene in Closed Meeting regarding real property used for a public purpose, specifically pertaining to (choose from below):

☐ 1. the acquisition of real property for a public purpose.

☐ 2. the disposition of (name publicly held real property involved).

because discussion in an open meeting may adversely affect the bargaining position or negotiating strategy of the Board.

- ☐ **PROTECTION OF PRIVACY OF INDIVIDUALS** – In accordance with Section 2.2-3711 (A)(4) of the Code of Virginia, I move that the Board of Supervisors convene in Closed Meeting regarding a personal matter not related to public business in order to protect the privacy of individuals.

- ☐ **PROSPECTIVE BUSINESS OR INDUSTRY OR EXPANSIONS OF EXISTING BUSINESS OR INDUSTRY** – In accordance with Section 2.2-3711 (A)(5) of the Code of Virginia, I move that the Board of Supervisors convene in Closed Meeting to discuss a prospective business or industry or expansion of an existing business or industry where no previous announcement has been made.

- ☐ **INVESTING OF PUBLIC FUNDS** – In accordance with Section 2.2-3711 (A)(6) of the Code of Virginia, I move that the Board of Supervisors convene in Closed Meeting to discuss the investing of public funds where competition or bargaining is involved and where discussion in open session would adversely affect the financial interest of the County.

☐ **LEGAL MATTERS** – In accordance with Section 2.2-3711 (A)(7) of the Code of Virginia, I move that the Board of Supervisors convene in Closed Meeting to (choose from below):

- ☐ 1. consult with legal counsel, consultants, and/or staff on a matter of actual litigation in which the County is involved.
- ☐ 2. consult with legal counsel, consultants, and/or staff on a matter of probable litigation in which the County may become involved.

because discussion in an open meeting may adversely affect the litigation position or negotiating strategy of the Board.

☐ **LEGAL MATTERS** – In accordance with Section 2.2-3711 (A)(8) of the Code of Virginia, I move that the Board of Supervisors convene in Closed Meeting to consult with legal counsel on a specific legal matter (identify matter in general terms at a minimum) requiring the provision of legal advice by counsel.

☐ **HAZARDOUS WASTE SITING** – In accordance with Section 2.2-3711 (A)(14) of the Code of Virginia, I move that the Board of Supervisors convene in Closed Meeting to discuss the terms, conditions, and provisions of a hazardous waste siting agreement after a finding in open meeting that an open meeting will have an adverse effect upon the negotiating position of the Board or the establishment of the terms, conditions, and provisions of the siting agreement, or both.

☐ **TERRORIST ACTIVITY** – In accordance with Section 2.2-3711 (A)(19) of the Code of Virginia, I move that the Board of Supervisors convene in Closed Meeting to (choose from below):

- ☐ 1. discuss plans to protect public safety relating to terrorist activity or specific cybersecurity threats or vulnerabilities and briefings by staff members, legal counsel, law-enforcement, or emergency service officials concerning actions taken to respond to such activity or a related threat to public safety.
- ☐ 2. discuss reports or plans related to the security of any governmental facility, building, or structure, or the safety of persons using such facility, building, or structure.

☐ **PUBLIC CONTRACTS** – In accordance with Section 2.2-3711 (A)(29) of the Code of Virginia, because discussion in an open session would adversely affect the bargaining position or negotiating strategy of the Board, I move that the Board of Supervisors convene in Closed Meeting to (choose from below):

- ☐ 1. discuss the award of a public contract involving the expenditure of public funds.
- ☐ 2. interview bidders or offerors.
- ☐ 3. discuss the terms or scope of a public contract.

AGENDA ITEM 6.c.

Certification of Closed Meeting

CERTIFICATION OF CLOSED MEETING

Mr. Chairman, I move that the King William County Board of Supervisors approve Standing Resolution 1 (SR-1) in accordance with Section 2.2-3712 (D) of the Code of Virginia, 1950, as amended, certifying that the Closed Meeting was conducted in conformity with the requirements of the Virginia Freedom of Information Act.

STANDING RESOLUTION – 1 (SR-1) A RESOLUTION TO CERTIFY COMPLIANCE WITH THE FREEDOM OF INFORMATION ACT REGARDING MEETING IN CLOSED MEETING

WHEREAS, the King William County Board of Supervisors has convened a Closed Meeting on this date pursuant to an affirmative recorded vote, and in accordance with the provisions of the Virginia Freedom of Information Act; and,

WHEREAS, Section 2.2-3712 (D) of the Code of Virginia requires a certification by the King William County Board of Supervisors that such Closed Meeting was conducted in conformity with Virginia law,

NOW, THEREFORE, BE IT RESOLVED that the King William County Board of Supervisors on this _____ day of _____, 2021, hereby certifies that, to the best of each member's knowledge:

1. Only public business matters lawfully exempted from open meeting requirements under the Freedom of Information Act were heard, discussed, or considered by the King William County Board of Supervisors in the Closed Meeting to which this certification resolution applies; and
2. Only such public business matters as were identified in the motion convening the Closed Meeting were heard, discussed, or considered by the King William County Board of Supervisors.

[ROLL CALL VOTE]