



**ALLEGHANY COUNTY**  
Request for Qualifications  
for Professional Services  
2027 Reappraisal of Alleghany County  
Residential and Commercial Properties

**Issue Date: Monday, March 11, 2024**

**Response Deadline: 3:00pm, Friday, April 19, 2024**

Deliver by FedEx, UPS, or in person

To: Alleghany County Tax Administrator

348 S. Main St., Suite 150

Sparta, NC 28675

**Outside of envelope must clearly state “RFQ – Alleghany County  
2027 Reappraisal**

**Introduction:**

Alleghany County is seeking a qualified firm to develop residential, commercial, and industrial schedule of values and appraised values for the upcoming 2027 reappraisal. Alleghany County is currently on a six-year reappraisal cycle. The last appraisal was effective 1/1/2021. The county is seeking assistance on valuing all improved and vacant parcels to include all residential, commercial and industrial properties. Alleghany County is a rural community located in northwest NC, consisting of an estimated 11,000 full time residents.

Alleghany County reserves the right to reject any and all submittals and may award the project consistent with the best interest of Alleghany County and the project. This RFQ is not an offer, obligation, or agreement to award work to any firm and no contractual relationship is created by responding to this RFQ.

Firms shall submit qualifications of both the firm, and the name of the person directly responsible for the work, and a list of similar projects completed in North Carolina by the Firm, and by said responsible person(s).

The selected firm will perform the required duties in accordance with North Carolina General Statutes and Uniform Appraisal Standards. The firm will work closely with the Tax Administrator and appraisal staff during the entire process. The Tax Administrator will have all final decisions about project direction and values.

The qualified firm for this reappraisal must have the ability to furnish the labor, materials, supplies, and the performance of all work required for the completion and delivery of a visual/street review reappraisal of all real property within Alleghany County. The qualified firm will assist the Alleghany County Tax Administrator and staff, the Alleghany County Board of Commissioners, and the Alleghany County Board of Equalization and Review.

**Background:**

A categorization of Alleghany County parcels is as follows:

<u>Description</u>	<u>Quantity</u>
Total Parcel Count	14,727
Residential Vacant	9,512
Residential Improved	4,058
Commercial Vacant	131
Commercial Improved	234
Industrial	15
Exempt Parcels	626
Exempt Parcels Improved	151

## **Scope of work to be performed:**

- The firm will complete a visual/street review reappraisal of all improved properties within Alleghany County by a certified appraiser.
- If the street review results in anything that appears to be inaccurate on the property record card, the appraiser will knock on the door of the property and verify information with the occupants. Appraisers will proceed to measure anything that appears, using the appraiser's best judgment, to be measured inaccurately.
- Appraisers will be responsible for taking exterior photos of each property and uploading photos into the provided software.
- Appraisers will review all building component data on the property record card, checking for accuracy.
- Important Note- County Field Data Collection Manual instruction will be followed by the firm as described in Addendum A at the end of this document.
- The firm will be responsible for developing rates, tables, and a schedule of values to be presented and adopted by the Alleghany County Board of Commissioners.
- The firm will provide documentation as to how rates and tables are developed including but not limited to regressions, paired sales analysis, and depreciation analysis. This analysis should be documented and shared with the county throughout the entire process.
- The firm will be responsible for all land valuation activities as part of the reappraisal. Land models should be developed based on unique factors such as use, geographic area and neighborhood. Documentation for all land valuation must be stored and shared with the county throughout the process.
- The firm will complete a final valuation review of each property ensuring grade, condition, and all factors pertaining to value are accurate and consistent with sales. Documentation must be stored and shared with the county for all review procedures, rates, and values.
- The firm will assist the county with public relation activities throughout the duration of the project. The firm should have a tested public relations process in place in other counties that can be used for Alleghany County.
- The firm will be responsible for all appeals up to and including appeals to the North Carolina Property Tax Commission.

## **Requirements and Qualifications:**

- The firm must provide the name of county/counties in which the firm has performed reappraisal work in North Carolina within the last eight years.
- The firm must be on the registered firm list with the North Carolina Department of Revenue.
- The firm should have some knowledge of the makeup of Alleghany County.
- The firm must show experience with Bi-Tek appraisal software and CAMA system.
- The firm must have a record of completing projects on schedule.
- The firm must have expertise in a mass appraisal of special type properties, i.e. golf courses, manufacturing, multi-family, income producing and other special properties.
- The firm must have experience in the development of a schedule of values in accordance with NCGS 105-317.
- Please provide a list of the names of each person who will work on this project and list their individual work history, training, certifications, licenses, and/or designations or other notable accomplishments.

- Describe the firm's resources available to support the services to be performed as outlined in this RFQ.
- Summarize what you consider to be the qualifications of your firm and/or team that make you the most qualified firm to perform the work associated with this solicitation.
- The values for this reappraisal must be finalized and entered into the CAMA system by October 31, 2026. All appraisal and analytical work will be complete by November 30, 2026.
- The firm shall immediately develop and deliver to Alleghany County a Reappraisal Plan and timeline for submission to the North Carolina Department of Revenue.

### **General Information:**

Bonding and Liability Insurance: The firm will be required to furnish a performance bond for the full amount of the contract and liability insurance with coverages in amounts deemed sufficient by Alleghany County, both of which shall be with companies licensed and authorized to do business in the State of North Carolina. At a minimum, the firm shall be required to have the following insurance coverage:

- Workers Compensation- Coverage for all paid and volunteer workers meeting the statutory requirements of the North Carolina Workers' Compensation Act, North Carolina General Statute 97.
- Commercial Automobile Liability- Coverage with limits of no less than \$ 1,000,000 per occurrence for bodily injury and property damage for any vehicle used during the performance of the contract.
- Commercial General Liability- bodily injury and property damage liability as will protect the firm from claims of bodily injury or property damage that arise from the operations of the contract. The amounts of such insurance coverage shall not be less than \$ 2,000,000 per occurrence and \$ 3,000,000 aggregate coverage.
- Professional Errors and Omissions- Coverage with minimum limits of \$ 1,000,000 per occurrence and \$ 2,000,000 aggregate.

The firm shall provide Alleghany County with a certificate of insurance that shall name County of Alleghany as an additional insured and contain the provision that the County of Alleghany will be given 30 days written notice of any intent to amend or terminate said policy by either the insured or the insuring company. However, a 10-day notice is sufficient for cancellation by the insuring company due to non-payment of premium.

- Billing and Payment- On the first day of each month, the firm shall submit a progress report to show the percentage of work completed and a detailed invoice reflecting the percentage of the project's total cost. Such progress reports will be subject to verification by the Tax Administrator prior to approval for payment. Based on each progress report, the Alleghany County Finance Department will make payment as follows:

Each month, the Alleghany County Finance Department will pay 90% of the invoiced amount for work fully performed by the firm as reported in the monthly progress report and verified by the Tax Administrator. The Tax Administrator or designated staff will submit invoices monthly for payment and 10% of each payment will be retained until completion and acceptance of all contract work. All invoices will be paid according to the County's bi-weekly accounts payable processing schedule. Monthly payments will be subject to

correction or adjustment following discovery of miscalculations or errors in any prior monthly progress report or payment.

- Office Space- Alleghany County will provide the necessary space for the performance of the reappraisal work. The county will supply tables, chairs, and filing cabinets as needed for the county provided office space. Alleghany County will supply computers with productivity enhancement software such as Microsoft, Excel, Word, or comparable products. County printers will be available as needed. Alleghany County will provide telephone service and internet access in the provided offices.
- Technology- Alleghany County is currently using web-based CAMA software provided by Bi-Tek. This software is compatible with all modern web browsers for data entry purposes. The county will provide onsite computers in addition to adequate remote VPN access for data entry. Alleghany County will collaborate with the successful firm to both export county data and images and import field review data from the firm in a timely and cost-effective manner for both parties. Images will be indexed by the firm in accordance with the file structure as defined by Alleghany County and Bi-Tek.

The firm shall not assign, transfer, or sublet the contract to any interest therein without first receiving written approval from Alleghany County and from the sureties on the bonds of the firm and the firm's liability insurance carrier.

The contract may be terminated by Alleghany County for the following reasons:

- Failure of the firm to begin the work on a specified date.
- Reasonable evidence that the progress being made by the firm is insufficient to complete the work within the specified time.
- Failure on the part of the firm to comply with any of the provisions of the contract.
- The non-appropriation of funds by the Alleghany County Board of Commissioners.
- For convenience upon 90 days written notice to the firm.

Before the contract can be terminated, the firm must be notified in writing by Alleghany County of the basis under which termination of the contract is supported. In cases of contract performance issues, 10 days after this notice of same is given, if a satisfactory effort has not been made by the firm to correct the conditions, the county may declare the contract terminated, notify the firm accordingly and pursue any right and remedy under the contract. In the event the contract is terminated, Alleghany County reserves the right to take possession of all completed work, work in progress, material, or any other part of the work, to account for said work and material, and to use the same to complete the project in accordance with the contract specifications. When the work is finally completed, the total cost of the same will be computed. If the total cost is more than the contract price, the difference shall be paid by the firm or its surety or sureties.

### **Submittal Requirements:**

All RFQ packages must be submitted via FedEx, UPS, or in person.

Packages must be clearly labeled "RFQ- Alleghany County 2027 Reappraisal,

Alleghany County Tax Administrator  
348 S. Main St., Suite 150  
Sparta, NC 28675

Packages must include (1) original, (3) copies of the original, along with a reference page and cover letter.

Statements of Qualification will be accepted up to, but not later than, 3:00pm, April 19, 2024. No submission will be considered if received after this deadline has expired, regardless of the reason. After opening, each RFQ will be evaluated and ranked based on the criteria set forth in the RFQ. A recommendation will be made to the Alleghany County Board of Commissioners for approval to award a contract. Issuance of this RFQ does not guarantee a contract will be awarded to any proposing firm.

Clarification requests and questions regarding this Request for Qualifications must be emailed to Rita Miller, Tax Administrator at [rita.miller@alleghanycounty-nc.gov](mailto:rita.miller@alleghanycounty-nc.gov) no later than 5:00pm, April 5, 2024.

Proposals may be withdrawn any time before the deadline for submission, but the withdrawal must be submitted in writing and signed by the proposing firm.

### **Selection Process:**

After the expiration of the deadline, an evaluation committee made up of Alleghany County staff will review all submitted Request for Qualifications that comply with the requirements contained within this RFQ. The criteria by which the RFQ will be evaluated include, but are not limited to:

- Clarity of the Request of Qualification
- The firm's understanding of the project objectives
- The firm's recommended approach to the project, including the firm's demonstrated ability to conduct the reappraisal program services within North Carolina.
- Qualifications of principal(s) to perform the work and the level of involvement in the project.
- Qualifications of project manager, supervisor, and key personnel assigned to the project.
- The firm's knowledge and demonstrated experience specifically with reappraisal programs within North Carolina.
- The firm's familiarity with North Carolina statutes and other laws relating to reappraisal programs.
- The firm's ability to perform the project is based on the successful completion of similarly sized projects with similar project scope.
- Proof of like projects that were completed on time and at or under budget.

### **Award of Contract:**

No agreements with any selected firm shall be binding until a contract is signed and executed by Alleghany County and the firm. Firms should include a sample of their proposed contract for the reappraisal services specified. All items in this RFQ must be included in the proposed contract. Alleghany County reserves the right to enter into a contract with another proposing firm if the originally selected firm fails to execute a contract with the County or defaults on its contract.

**Equal Opportunity Employer:**

Alleghany County is an equal employment opportunity employer, is a federal contractor, and therefore the provisions and affirmative action obligations of 41 CFR 60-1.4(a), 41 CFR 60-741.5(a), 41 CFR 60-250.4 are incorporated herein by reference, where applicable.

**Rights of Alleghany County:**

Alleghany County reserves the right to reject any and all RFQ's. Alleghany County further reserves the right to waive formalities and technicalities as far as it is authorized to do so, where it deems advisable in protection of the best interest of the County. RFQ's may be rejected if they show any omission, conditional proposals, or irregularities of any kind.

## ADDENDUM A

Copied from the Alleghany County Field Data Collection Manual

### 1. For property on which there are no “no trespassing” signs conspicuously posted, or for which the owner/occupant has not instructed the appraiser to stay off the property-

Make sure you have the correct property record card ready for the property. If possible, park the county vehicle so that the County Seal is easily viewed from the building. Before exiting the vehicle, visually observe your surroundings for safety. If at any time you are unsure of your safety, leave the property and we will either have two appraisers visit the property together or estimate the improvements. Once you have exited the vehicle you should go directly to the front entrance, ring the bell, and knock firmly, take a step back away from the door and give 2 to 3 minutes for the occupant to answer.

#### **Properly identify yourself and tactfully explain your purpose for being there-**

When someone answers the door, be polite and friendly, identify yourself and your reason for being there. People respond positively to being called by name. It distinguishes you from a door-to-door salesperson. So, be ready to greet the occupant by name. In some cases, the name on the property record card may not be the same as the occupants or tenant’s and this will be a suitable time to ask with whom you are speaking.

Your county ID should be displayed on your shirt above the waist (**do not approach a property without your county id!**) and identifying signs should be on the vehicle you are driving. You should be wearing a brightly colored vest with “Tax Dept.” clearly visible.

Example “Good morning, my name is \_\_\_\_\_ and I am with the Alleghany County Assessor’s Office. Are you Mrs. Miller?” Answer could be “No, I am not,” you should respond “Oh, I see. Is this the Miller property?” The answer may be “Yes, it is.” Respond “Good,” I am here to \_\_\_\_\_ measure new construction, verify data, etc.,” and need to ask you a few questions, walk around/measure house and possibly take a photo.” If the occupant is not the owner, you should ask “May I get your name please?”

*Under no circumstances do we talk to anyone under the age of 18.* If no one over the age of 18 is present, explain the reason for your visit and tell them you will be measuring the outside of the home and any outbuildings.

Sample questions you would ask are “What type of floors do you have?” Typically, this will be hardwood, carpet, laminate, etc. “How do you heat and cool your home?” If they do not know, you can observe physical indications from the outside such as chimney, heat pump, oil barrel, etc... “How many bathrooms and bedrooms do you have?;” “Do you know the year your home was constructed?” Then “Thank you. Now all I need to do is take some measurements and take a quick look around the outside, is that okay?” If you are there to measure the entire house be sure to explain to the owner what you are doing.

If the owner refuses to answer your questions at the door thank them for their trouble and ask if you can measure outside. Generally, permission is granted – thank them and measure the exterior quickly but accurately. If permission is not granted and you are refused- excuse yourself immediately, leave the



property, mark your data entry card with the proper entry code and report all refusals to the Tax Administrator. Do not argue with the property owner.

If no one is available, and you feel safe in doing so, you may proceed with your inspection of the exterior of the building. Do not peep in windows or open doors on properties that are not clearly new builds and under construction. Once you have completed your review, leave a door hanger, and take a photo if needed to update the records.

## 2. **Properties that display 'NO TRESPASSING' signs**

You may use the main entrance, walkway, and door. You should identify yourself, as described above, explain the reason for your visit, and ask if you can walk around the property to assess. If the owner/occupant agrees, make note on the property record card that you were given permission, and have the owner/occupant sign and date the card. **DO NOT** walk around the structure or otherwise enter the property beyond the front walkway. Document visit in CAMA comments.

## 3. **Properties whose owners have expressed "No Entry" for Tax Department.**

Property owners who request, whether orally or in writing, that they do not permit the Tax Department upon their property, should be contacted by mail or phone if appraiser needs to review property. You will set up a date and time for the field review. You will take a second person (tax staff, deputy, etc.) with you for the visit. Contact by mail should include a form the property owner signs and dates, acknowledging their approval of your visit. This form shall be scanned into the CAMA system and attached to all appraisal work for that visit. Contact by phone shall be documented in the CAMA system, and during the field review, the Permission form signed and dated by the property owner. This form will be scanned into the CAMA system, as well as attached to field work from the visit. If permission is granted at the property, the appraiser will have the home owner initial the property record card, either paper copy or on the tablet, whichever is available.

If the property owner **DENIES** entry for the review. The appraiser will estimate the value of improvements and mail a change of value notice.

Properties which have "No Entry" designation should be either coded in the CAMA system, or a file maintained in the Tax Appraisal department so that all appraisers have access to and knowledge of said properties.

### **Note: Taxpayers right to Appeal**

Taxpayers retain the right to appeal their tax appraisals even if they refuse to allow county tax appraisers to enter their property. Taxpayers can rebut the appraisal by providing video or photographs of the interior of their property or by providing valuation reports from private appraisers. The valuation report's purpose should be to determine fair market value at the date of the county's last revaluation.

Usually, most people are very cooperative. Remember, you are not producing a value at this time, you should not estimate or discuss possible values, you are collecting or verifying measurements and doing a

visual inspection. You do not enter a dwelling. The only exception to entry will be if the structure is new construction and the builder or property owner is available to answer questions and allow entry. If the construction of a new structure is completed to the point where there are walls, windows and doors installed the appraiser should limit their site visit to the outside of the structure.

If for any reason the appraiser does not feel that they can safely perform the review do not go, return to the office, and send a letter requesting access to the property, or estimate the appraisal and send change of value notice.

**The appraiser SHOULD NOT:**

**Open a closed gate or hop a fence/wall to access the property**

**Look into a residence through the windows**

**Enter onto property that has been coded as No Site Review. These property owners have specifically requested that, or objected to, an appraiser gaining access to the property.**

*Helpful tips: Always remain polite; remind yourself to communicate in a friendly, clear, brief manner; Do not joke with or tease people; Do not be defensive – you have no reason to be; Don't be aggressive – you are not a policeman with a search warrant. You are there to ask for interior information and to measure and list the property; Maintain good eye contact; Address person by name if possible. Also, be sure to ask the occupant for the year built of any outbuildings. Asking for this information at the time of the interview will avoid having to bother the occupant again.*