



August 04, 2011

SHELLY MURRAY  
DEPARTMENT OF ADMINISTRATION  
WV PURCHASING DIVISION  
2019 WASHINGTON ST E  
PO BOX 50130  
CHARLESTON, WV 25305-0130

**RE: Letter of Transmittal – Bid Response to RFQ TAX11008  
West Virginia Statewide Property Tax Equalization Training Program**

Dear Ms. Murray:

We welcome the opportunity to bid on WV RFQ TAX11008. Please find enclosed herewith (under separate cover) our full response, in full compliance, as required by RFQ TAX11008.

We have developed an informed bid response for an entirely integrated training program across the scope of **1**, training syllabus development, **2**, preliminary presentations and reviews before the Property Valuation and Training Procedures Commission and the State Property Tax Division, **3**, classroom and hands-on instruction at the regional locations and each of the fifty-five counties.

Our proposed effort recognizes the importance of the art of teaching as well as the mechanics of instruction. And, the great importance of leaving the state and the assessors with the ability for continuing education without having to again go through such a monumental effort and cost. Accordingly our team of associates for this very important program far exceeds the experience and expertise of the RFQ; including highly qualified and recognized instructors by the USPAP and IAAO with direct West Virginia experience.

We welcome the opportunity to present our proposal and resources.

Respectfully,

A handwritten signature in black ink, appearing to read "Eric Q. Ebert". The signature is fluid and cursive, extending across the width of the page.

Eric Q. Ebert  
CAMA Resources and Technologies, LLC

Enclosures





## **BID RESPONSE**

### **TAX 11008**

## **STATEWIDE PROPERTY TAX EQUALIZATION TRAINING PROGRAM**

### **SCOPE OF SERVICES**

Cama Resources & Technologies, LLC (CRT) as a qualified Contractor is able to perform appraisal training of county assessors, members of the county assessors' staff and personnel of the Property Tax Division of the State Tax Division as set forth in RFQ TAX11008. CRT will complete the training within 18 months of the award. CRT will conduct formal appraisal training in a classroom environment at two regional locations. In addition, CRT will conduct on-site appraisal training at each of the 55 county assessors' offices. CRT will perform both classroom and on-site training in the practices and procedures in the appraisal of the following classes of real property: Residential, Farm, Commercial and Industrial. It is understood that the appraisal of Agricultural Property valued by Use Valuation, Managed Timberland, Natural Resources and Public Utility property are not part of the training programs.

#### **1. Program Objective**

CRT will train State Tax Division and county assessors' personnel in appraisal practices and procedures. CRT will conduct formal regional training classes at the location and on the subject matter identified in Attachment A of RFQ TAX11008. CRT will also provide on-site appraisal training in practices and procedures to county assessors and their staff at each of the 55 county assessors' offices. Each assessor and office location being identified in Attachment B of RFQ TAX11008. CRT will provide each of the 55 county assessors' offices with 2.5 days (20 hours) of on-site appraisal training. CRT will also provide additional on-site training at a cost per day as specified in Section B. of the attached Appraisal Training Pricing Summary, should the State Tax Division determine that additional training in a county or counties is required.

#### **2. Contractor**



- a. To the extent that CRT may engage in activities subject to the laws, regulations and procedures of the State of West Virginia relating to the appraisal and assessment of property, CRT will comply with all laws and regulations regarding the appraisal and assessment of real and tangible property in the State of West Virginia. All activities performed by CRT will be consistent with those laws, regulations and appraisal procedures of the State.
- b. CRT understands and acknowledges that taxpayer and tax return information is confidential under the provision of West Virginia Code §11-14a, 11-1A-23 11-IC-14, 11-10-Sd and other provisions of the West Virginia Code. If selected as the successful Contractor, CRT agrees to sign the Confidentiality Statement included as Attachment C to RFQ TAX11008 and to abide by the provisions of the Confidentiality Statement. The signed Confidentiality Statement will become a part of the contract between the State Tax Division and CRT.
- c. Subcontractors. CRT may employ subcontractors that CRT deems necessary. All subcontractors are listed in this response to the RFQ TAX11008 and the same information provided for CRT is provided for each subcontractor. Each subcontractor meets or exceeds the qualifications required of CRT, as described under Item #4. CRT understands and acknowledges that any change in the subcontractor, or addition of a subcontractor when CRT has not previously listed the subcontractor in the response to the RFQ, during the term of the program, must be approved by the State Tax Division.
- d. This response provides an all-inclusive fee; including the cost per day for additional on-site training should the Tax Division deem that additional training in a county or counties is required. CRT shall incur any additional expenses and liabilities without any obligation to the State of West Virginia or any of its counties.
- e. CRT shall provide a training manual for each attendee at each of the formal classroom appraisal training classes attached hereto (Attachment A). CRT will not charge attendees for the manual, and the cost of manuals is a component of CRT's bid price. CRT understands that the number of participants for each of the formal appraisal classes will not exceed 50 per class.
- f. CRT shall provide a comprehensive work plan to the State Tax Division within 30 days after the contract is awarded. The work plan will detail the billing process, training program schedule including the instructors/trainers



assigned, and an outline of the subject matter for each of the formal classroom appraisal training classes to be conducted.

- g. CRT shall not schedule the on-site appraisal training to occur on any date prior to March 1, 2012 for the following 12 counties, unless the State Tax Division approves an earlier start date:  
Boone, Mercer, Fayette, Mingo, Kanawha, Raleigh, Lincoln, Summers, Logan, Wayne, McDowell, Wyoming
- h. CRT shall not schedule the formal classroom regional training classes for the following types of classes to occur on any date prior to April 1, 2012.
  - 1. IAS CAMA Residential/Farm Data Collection and Valuation
  - 2. IAS CAMA Commercial/Industrial Data Collection and Valuation
- i. For the purposes of this RFQ, both a Formal Classroom Training day and an On-Site Appraisal Training Day are defined as 8 hours.

### 3. State Tax Division Responsibilities

CRT understands that The State Tax Division shall be responsible for the following:

- a. As CRT will be working at various locations throughout the State, the State Tax Division will provide, at times, temporary accommodations, to the extent possible, in State Tax Division field offices located in Beckley, Clarksburg, Martinsburg, Parkersburg and Wheeling.
- b. The State Tax Division will provide access to photocopiers, fax machines, telephones, and server and network access at the Property Tax Division, that are directly necessary for fulfillment of the duties of CRT or subcontractors set forth in this document, in Charleston and in our field offices located in Beckley, Clarksburg, Martinsburg, Parkersburg and Wheeling.



- c. The State Tax Division will, at its own expense, provide classroom space for the formal classroom appraisal training at the two regional sites in Charleston and the Clarksburg area.

#### 4. Qualifications of Contractor and Subcontractor

- a. CRT and any Subcontractor are registered to do business in West Virginia and current with all taxes, licenses, and fees including those issued by State, county or municipal governments.
- b. CRT is highly competent in performing mass appraisal and has a high level of knowledge, experience and understanding of the current IAS/CAMA software in use by the State Tax Division and the 55 county assessors. CRT and subcontractors will submit a resume to the State Tax Division demonstrating the following required levels of knowledge, competency, experience and education. Upon request CRT will provide any additional documentation within 24 hours of the request.
  - at least 5 years of appraisal experience including the appraisal of residential, farm, commercial and industrial real property.
  - Any individual performing classroom training or the on-site training at least 5 years of appraisal experience, including the appraisal of residential, farm, commercial and industrial real property.
  - Any individual performing classroom training or the on-site training must have at least 5 years of experience with the IAS/CAMA software currently in use by the State Tax Division and the 55 county assessors' offices in West Virginia.

#### 5. Liquidated Damages

CRT understands that the State Tax Commissioner may assess liquidated damages at the rate of \$300 a day for the failure of CRT to have completed the training program within eighteen months (548 days) after the award of the contract.

#### 6. Conflict of Interest



CRT affirms that CRT, CRT's representatives, and subcontractors have no interest, direct or indirect, which would compromise the performance of CRT's services and subcontractor's hereunder; and CRT affirms that CRT and subcontractors shall not acquire or otherwise be possessed of any such interest. CRT shall promptly notify the State Tax Division of any circumstance which is, or may give rise to, an interest in contravention of this provision, or the appearance of an interest in contravention of this provision.

7. Payment Schedule

CRT understands that monthly progress payments shall be made based on review and approval by the State Tax Division.

8. Training Schedule

The training shall begin once the work plan identified in Item #2F is approved. The entire project is to be completed within eighteen months of the award date.

9. Formal Classroom Regional Training Classes and On-Site Training Locations

The formal classroom regional training classes and locations are identified in Attachment A. The location for the on-site training of the assessors and their offices is identified in Attachment B.



## Appraisal Training Pricing Summary

### A. Formal Classroom Regional Training Classes - 12 Classes identified on Attachment A.

Type of Class	Location of Training	No. of Classes	Length of Class	Total Bid Amount
IAS Computer Assisted Land Pricing (CALP)	Charleston	1	3 Days	9000
IAS Computer Assisted Land Pricing (CALP)	Charleston	1	3 Days	9000
IAS Computer Assisted Land Pricing (CALP)	Clarksburg Area	1	3 Days	9000
IAS Computer Assisted Land Pricing (CALP)	Clarksburg Area	1	3 Days	9000
IAS CAMA Residential/Farm Data Collection and Valuation	Charleston	1	2.5 Days	6750
IAS CAMA Residential/Farm Data Collection and Valuation	Clarksburg Area	1	2.5 Days	6750
IAS CAMA Commercial/Industrial Data Collection and Valuation	Charleston	1	2.5 Days	6750
IAS CAMA Commercial/Industrial Data Collection and Valuation	Clarksburg Area	1	2.5 Days	6750
IAS Sales Ratio Program	Charleston	1	2 Days	5000
IAS Sales Ratio Program	Charleston	1	2 Days	5000
IAS Sales Ratio Program	Clarksburg Area	1	2 Days	5000
IAS Sales Ratio Program	Clarksburg Area	1	2 Days	5000

Total Bid for 12 Formal Classroom Regional Training Classes \$ **83,000** (A)



## Appraisal Training Pricing Summary

B. On-Site Appraisal Training of 55 counties for 2.5 days (20 hours) for each of the counties listed below.

	County	Bid Amount Per County	Additional On-Site Training at a per Day Rate of *	* Not included in Grand Total
01	Barbour	10000	1750	
02	Berkeley	10000	1750	
03	Boone	10000	1750	
04	Braxton	10000	1750	
05	Brooke	10000	1750	
06	Cabell	10000	1750	
07	Calhoun	10000	1750	
08	Clay	10000	1750	
09	Doddridge	10000	1750	
10	Fayette	10000	1750	
11	Gilmer	10000	1750	
12	Grant	10000	1750	
13	Greenbrier	10000	1750	
14	Hampshire	10000	1750	
15	Hancock	10000	1750	
16	Hardy	10000	1750	
17	Harrison	10000	1750	
18	Jackson	10000	1750	
19	Jefferson	10000	1750	
20	Kanawha	10000	1750	
21	Lewis	10000	1750	
22	Lincoln	10000	1750	
23	Logan	10000	1750	
24	Marion	10000	1750	
25	Marshall	10000	1750	
26	Mason	10000	1750	
27	McDowell	10000	1750	
28	Mercer	10000	1750	
29	Mineral	10000	1750	
30	Mingo	10000	1750	
31	Monongalia	10000	1750	
32	Monroe	10000	1750	
33	Morgan	10000	1750	
34	Nicholas	10000	1750	
35	Ohio	10000	1750	
36	Pendleton	10000	1750	
37	Pleasants	10000	1750	
38	Pocahontass	10000	1750	
39	Preston	10000	1750	
40	Putnam	10000	1750	
41	Raleigh	10000	1750	
42	Randolph	10000	1750	
43	Ritchie	10000	1750	
44	Roane	10000	1750	
45	Summers	10000	1750	
46	Taylor	10000	1750	
47	Tucker	10000	1750	
48	Tyler	10000	1750	
49	Upshur	10000	1750	
50	Wayne	10000	1750	
51	Webster	10000	1750	
52	Wetzel	10000	1750	
53	Wirt	10000	1750	
54	Wood	10000	1750	
55	Wyoming	10000	1750	
<b>Total Bid</b>		<b>\$ 550,000</b>	<b>(B)</b>	

**Grand Total A & B \$ 633,000**



RFQ No. TAx11008

STATE OF WEST VIRGINIA  
Purchasing Division

**PURCHASING AFFIDAVIT**

**West Virginia Code §5A-3-10a states:** No contract or renewal of any contract may be awarded by the state or any of its political subdivisions to any vendor or prospective vendor when the vendor or prospective vendor or a related party to the vendor or prospective vendor is a debtor and the debt owed is an amount greater than one thousand dollars in the aggregate.

**DEFINITIONS:**

"Debt" means any assessment, premium, penalty, fine, tax or other amount of money owed to the state or any of its political subdivisions because of a judgment, fine, permit violation, license assessment, defaulted workers' compensation premium, penalty or other assessment presently delinquent or due and required to be paid to the state or any of its political subdivisions, including any interest or additional penalties accrued thereon.

"Debtor" means any individual, corporation, partnership, association, limited liability company or any other form or business association owing a debt to the state or any of its political subdivisions. "Political subdivision" means any county commission; municipality; county board of education; any instrumentality established by a county or municipality; any separate corporation or instrumentality established by one or more counties or municipalities, as permitted by law; or any public body charged by law with the performance of a government function or whose jurisdiction is coextensive with one or more counties or municipalities. "Related party" means a party, whether an individual, corporation, partnership, association, limited liability company or any other form or business association or other entity whatsoever, related to any vendor by blood, marriage, ownership or contract through which the party has a relationship of ownership or other interest with the vendor so that the party will actually or by effect receive or control a portion of the benefit, profit or other consideration from performance of a vendor contract with the party receiving an amount that meets or exceed five percent of the total contract amount.

**EXCEPTION:** The prohibition of this section does not apply where a vendor has contested any tax administered pursuant to chapter eleven of this code, workers' compensation premium, permit fee or environmental fee or assessment and the matter has not become final or where the vendor has entered into a payment plan or agreement and the vendor is not in default of any of the provisions of such plan or agreement.

Under penalty of law for false swearing (*West Virginia Code §61-5-3*), it is hereby certified that the vendor affirms and acknowledges the information in this affidavit and is in compliance with the requirements as stated.

**WITNESS THE FOLLOWING SIGNATURE**

Vendor's Name: CAMA RESOURCES + TECHNOLOGIES, LLC

Authorized Signature: [Signature] Date: 8/3/2011

State of Ohio

County of Pickaway, to-wit:

Taken, subscribed, and sworn to before me this 3<sup>rd</sup> day of August, 2011.

My Commission expires 6/4, 2016.

**AFFIX SEAL HERE**

**NOTARY PUBLIC** Donna M. Sedof



**DONNA M. HADDOX**  
Notary Public, State of Ohio  
My Commission Expires  
June 4, 2016