



State of West Virginia
 Department of Administration
 Purchasing Division
 2019 Washington Street East
 Post Office Box 50130
 Charleston, WV 25305-0130

Request for Quotation

RFQ NUMBER
TAX11008

PAGE
1

ADDRESS CORRESPONDENCE TO ATTENTION OF
SHELLY MURRAY 304-558-8801

VENDOR

*A09142443 740-968-1800
 KELLY REAL ESTATE APPRAISALS L
 43029 HARRAH ST
 FLUSHING OH 43977

SHIP TO

STATE TAX DIVISION
 OPERATIONS DIVISION
 1001 LEE STREET E, 3RD FLOOR
 CHARLESTON, WV
 25301-1725 304-558-0761

DATE PRINTED	TERMS OF SALE	SHIP VIA	FOB	FREIGHT TERMS
07/07/2011				

BID OPENING DATE: **08/04/2011** BID OPENING TIME **01:30PM**

LINE	QUANTITY	UOP	CAT. NO.	ITEM NUMBER	UNIT PRICE	AMOUNT
0001	1	LS		946-15		
<p>THE WEST VIRGINIA PURCHASING DIVISION, FOR THE AGENCY, THE WEST VIRGINIA TAX DEPARTMENT, PROPERTY DIVISION, IS SOLICITING BIDS TO PERFORM APPRAISAL TRAINING OF COUNTY ASSESSORS, STAFF, AND PERSONNEL OF THE PROPERTY TAX DIVISION PER THE ATTACHED SPECIFICATIONS.</p> <p>TECHNICAL QUESTIONS MUST BE SUBMITTED IN WRITING TO SHELLY MURRAY IN THE WEST VIRGINIA PURCHASING DIVISION VIA MAIL AT THE ADDRESS SHOWN AT THE TOP OF THIS RFQ, VIA FAX AT 304-558-4115, OR VIA E-MAIL AT SHELLY.L.MURRAY@WV.GOV. DEADLINE FOR ALL TECHNICAL QUESTIONS IS 07/19/2011 AT THE CLOSE OF BUSINESS. ALL TECHNICAL QUESTIONS RECEIVED, IF ANY, WILL BE ADDRESSED BY ADDENDUM AFTER THE DEADLINE.</p> <p>APPRAISAL TRAINING</p> <p>EXHIBIT 3</p> <p>LIFE OF CONTRACT: THIS CONTRACT BECOMES EFFECTIVE UPON AWARD AND EXTENDS FOR A PERIOD OF ONE (1) YEAR OR UNTIL SUCH "REASONABLE TIME" THEREAFTER AS IS NECESSARY TO OBTAIN A NEW CONTRACT OR RENEW THE ORIGINAL CONTRACT. THE "REASONABLE TIME" PERIOD SHALL NOT EXCEED TWELVE (12) MONTHS. DURING THIS "REASONABLE TIME" THE VENDOR MAY TERMINATE THIS CONTRACT FOR ANY REASON UPON GIVING THE DIRECTOR OF PURCHASING 30 DAYS WRITTEN NOTICE.</p>						

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SIGNATURE	TELEPHONE	DATE	
TITLE	FEIN	ADDRESS CHANGES TO BE NOTED ABOVE	

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<p>UNLESS SPECIFIC PROVISIONS ARE STIPULATED ELSEWHERE IN THIS CONTRACT DOCUMENT, THE TERMS, CONDITIONS AND PRICING SET HEREIN ARE FIRM FOR THE LIFE OF THE CONTRACT.</p> <p>RENEWAL: THIS CONTRACT MAY BE RENEWED UPON THE MUTUAL WRITTEN CONSENT OF THE SPENDING UNIT AND VENDOR, SUBMITTED TO THE DIRECTOR OF PURCHASING THIRTY (30) DAYS PRIOR TO THE EXPIRATION DATE. SUCH RENEWAL SHALL BE IN ACCORDANCE WITH THE TERMS AND CONDITIONS OF THE ORIGINAL CONTRACT AND SHALL BE LIMITED TO TWO (2) ONE (1) YEAR PERIODS.</p> <p>CANCELLATION: THE DIRECTOR OF PURCHASING RESERVES THE RIGHT TO CANCEL THIS CONTRACT IMMEDIATELY UPON WRITTEN NOTICE TO THE VENDOR IF THE COMMODITIES AND/OR SERVICES SUPPLIED ARE OF AN INFERIOR QUALITY OR DO NOT CONFORM TO THE SPECIFICATIONS OF THE BID AND CONTRACT HEREIN.</p> <p>OPEN MARKET CLAUSE: THE DIRECTOR OF PURCHASING MAY AUTHORIZE A SPENDING UNIT TO PURCHASE ON THE OPEN MARKET, WITHOUT THE FILING OF A REQUISITION OR COST ESTIMATE, ITEMS SPECIFIED ON THIS CONTRACT FOR IMMEDIATE DELIVERY IN EMERGENCIES DUE TO UNFORESEEN CAUSES (INCLUDING BUT NOT LIMITED TO DELAYS IN TRANSPORTATION OR AN UNANTICIPATED INCREASE IN THE VOLUME OF WORK.)</p> <p>QUANTITIES: QUANTITIES LISTED IN THE REQUISITION ARE APPROXIMATIONS ONLY, BASED ON ESTIMATES SUPPLIED BY THE STATE SPENDING UNIT. IT IS UNDERSTOOD AND AGREED THAT THE CONTRACT SHALL COVER THE QUANTITIES ACTUALLY ORDERED FOR DELIVERY DURING THE TERM OF THE CONTRACT, WHETHER MORE OR LESS THAN THE QUANTITIES SHOWN.</p> <p>ORDERING PROCEDURE: SPENDING UNIT(S) SHALL ISSUE A</p>						

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<p>WRITTEN STATE CONTRACT ORDER (FORM NUMBER WV-39) TO THE VENDOR FOR COMMODITIES COVERED BY THIS CONTRACT. THE ORIGINAL COPY OF THE WV-39 SHALL BE MAILED TO THE VENDOR AS AUTHORIZATION FOR SHIPMENT, A SECOND COPY MAILED TO THE PURCHASING DIVISION, AND A THIRD COPY RETAINED BY THE SPENDING UNIT.</p> <p>BANKRUPTCY: IN THE EVENT THE VENDOR/CONTRACTOR FILES FOR BANKRUPTCY PROTECTION, THE STATE MAY DEEM THE CONTRACT NULL AND VOID, AND TERMINATE SUCH CONTRACT WITHOUT FURTHER ORDER.</p> <p>THE TERMS AND CONDITIONS CONTAINED IN THIS CONTRACT SHALL SUPERSEDE ANY AND ALL SUBSEQUENT TERMS AND CONDITIONS WHICH MAY APPEAR ON ANY ATTACHED PRINTED DOCUMENTS SUCH AS PRICE LISTS, ORDER FORMS, SALES AGREEMENTS OR MAINTENANCE AGREEMENTS, INCLUDING ANY ELECTRONIC MEDIUM SUCH AS CD-ROM.</p> <p>EXHIBIT 6</p> <p>PRICE ADJUSTMENT PROVISION: THE STATE OF WEST VIRGINIA WILL CONSIDER BIDS THAT CONTAIN PROVISIONS FOR PRICE ADJUSTMENTS PRIOR TO THE ORIGINAL EXPIRATION OF THE CONTRACT, PROVIDED THAT SUCH PRICE ADJUSTMENT COVERS BOTH UPWARD AND DOWNWARD MOVEMENT OF THE COMMODITY PRICE, AND THAT ADJUSTMENT IS BASED ON THE "PASS THROUGH" INCREASE OR DECREASE OF RAW MATERIALS AND/OR LABOR, WHICH MAKE UP ALL OR A SUBSTANTIAL PART OF A PRODUCT. ADJUSTMENTS ARE TO BE BASED UPON AN ACTUAL DOLLAR FIGURE, NOT A PERCENTAGE. ALL PRICE ADJUSTMENT REQUESTS MUST BE SUBSTANTIATED IN A MANNER ACCEPTABLE TO THE DIRECTOR PURCHASING, E.G. GOVERNMENTAL BENCH MARKS, GENERAL MARKET INCREASE, PUBLISHED PRICE LISTS. SUCH REQUESTS FOR AND INCREASE</p>						

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<p>SHOULD BE RECEIVED IN WRITING BY THE DIRECTOR OF PURCHASING AT LEAST 30 DAYS IN ADVANCE OF THE EFFECTIVE DATE OF THE INCREASE. ANY TIME THE VENDOR REQUESTS A PRICE ADJUSTMENT, THE PURCHASING DIVISION MAY EITHER ACCEPT THE PRICE ADJUSTMENT AND AMEND THE CONTRACT ACCORDINGLY OR REJECT THE ADJUSTMENT IN ITS ENTIRETY AND CANCEL THE CONTRACT.</p> <p>PREFERRED TERMS: IT IS PREFERRED THAT THE PRICES ON THIS CONTRACT ARE FIRM FOR LIFE OF THE CONTRACT, AS INDICATED IN THE LIFE OF CONTRACT CLAUSE CONTAINED HEREIN, NOT TO EXCEED ONE (1) YEAR.</p> <p>PASS THROUGH PRICE INCREASES WILL BE CONSIDERED AT TIME OF CONTRACT RENEWAL ONLY.</p> <p>PURCHASING CARD ACCEPTANCE: THE STATE OF WEST VIRGINIA CURRENTLY UTILIZES A VISA PURCHASING CARD PROGRAM WHICH IS ISSUED THROUGH A BANK. THE SUCCESSFUL VENDOR MUST ACCEPT THE STATE OF WEST VIRGINIA VISA PURCHASING CARD FOR PAYMENT OF ALL ORDERS PLACED BY ANY STATE AGENCY AS A CONDITION OF AWARD.</p> <p style="text-align: center;">NOTICE</p> <p>A SIGNED BID MUST BE SUBMITTED TO:</p> <p style="text-align: center;">DEPARTMENT OF ADMINISTRATION PURCHASING DIVISION BUILDING 15 2019 WASHINGTON STREET, EAST CHARLESTON, WV 25305-0130</p>						

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TAX11008**STATEWIDE PROPERTY TAX EQUALIZATION
TRAINING PROGRAM****SPECIFICATIONS****SCOPE OF THE REVIEW**

The purpose of the Request for Quote (RFQ) is to solicit responses from a qualified Contractor 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. The training is to be completed within 18 months of the award. The Contractor will be required to conduct formal appraisal training in a classroom environment at two regional locations. In addition, the contractor will be required to conduct on-site appraisal training at each of the 55 county assessors' offices. The Contractor 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. The appraisal of Agricultural Property valued by Use Valuation, Managed Timberland, Natural Resources and Public Utility property are not part of the training programs.

The State will choose one contractor to provide the training services listed in this RFQ.

1. Program Objective

The Contractor will train State Tax Division and county assessors' personnel in appraisal practices and procedures. The Contractor will conduct formal regional training classes at the location and on the subject matter identified in Attachment A. The Contractor 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 is identified in Attachment B. The Contractor is to provide each of the 55 county assessors' offices with 2.5 days (20 hours) of on-site appraisal training. The Contractor is also to provide a cost per day for additional on-site training should the State Tax Division determine that additional training in a county or counties is required.

2. Contractor

- a. To the extent that the Contractor 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, the Contractor must 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 the Contractor must be consistent with those laws, regulations and appraisal procedures of the State.

- b. Taxpayer and tax return information is confidential under the provision of West Virginia Code §§11-1-4a, 11-1A-23 11-1C-14, 11-10-5d and other provisions of the West Virginia Code. The successful Contractor must agree to sign the Confidentiality Statement included as Attachment C to this RFQ and 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 the Contractor.
- c. Subcontractors. The Contractor may employ subcontractors that the Contractor deems necessary provided that all subcontractors are listed in the response to the RFQ and that the same information provided for the Contractor is provided for each subcontractor. Each subcontractor must meet or exceed the qualifications required of the contractor, as described under Item #4. Any change in the subcontractor, or addition of a subcontractor when the Contractor 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. The response shall provide 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. The Contractor shall incur any additional expenses and liabilities without any obligation to the State of West Virginia or any of its counties.
- e. The Contractor shall provide a training manual for each attendee at each of the formal classroom appraisal training classes attached hereto (Attachment A). The Contractor may not charge attendees for the manual, and the cost of manuals shall be a component of the Contractor's bid price. The number of participants for each of the formal appraisal classes will not exceed 50 per class.
- f. The Contractor 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. The Contractor 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. The Contractor 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

The State Tax Division shall be responsible for the following:

- a. As the Contractor 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 the Contractor 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. The Contractor, and any Subcontractor, must be registered to do business in West Virginia and be current with all taxes, licenses, and fees including those issued by State, county or municipal governments.

- b. The Contractor must be highly competent in performing mass appraisal and have 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. The Contractor and subcontractors should submit a resume to the State Tax Division demonstrating the following required levels of knowledge, competency, experience and education. Upon request the Contractor must provide any additional documentation within 24 hours of the request.
- The successful Contractor must have 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 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

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

6. Conflict of Interest

Contractor affirms that the contractor, the contractor's representatives, and subcontractors have no interest, direct or indirect, which would compromise the performance of the contractor's services and subcontractor's hereunder; and the contractor affirms that the contractor and subcontractors shall not acquire or otherwise be possessed of any such interest. The contractor 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

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	\$ 29,898
IAS Computer Assisted Land Pricing (CALP)	Charleston	1	3 days	\$ 29,898
IAS Computer Assisted Land Pricing (CALP)	Clarksburg Area	1	3 days	\$ 29,898
IAS Computer Assisted Land Pricing (CALP)	Clarksburg Area	1	3 days	\$ 29,898
IAS CAMA Residential/Farm Data Collection and Valuation	Charleston	1	2-1/2 days	\$ 24,915
IAS CAMA Residential/Farm Data Collection and Valuation	Clarksburg Area	1	2-1/2 days	\$ 24,915
IAS CAMA Commercial/Industrial Data Collection and Valuation	Charleston	1	2-1/2 days	\$ 24,915
IAS CAMA Commercial/Industrial Data Collection and Valuation	Clarksburg Area	1	2-1/2 days	\$ 24,915
IAS Sales Ratio Program	Charleston	1	2 days	\$ 19,932
IAS Sales Ratio Program	Charleston	1	2 days	\$ 19,932
IAS Sales Ratio Program	Clarksburg Area	1	2 days	\$ 19,932
IAS Sales Ratio Program	Clarksburg Area	1	2 days	\$ 19,932

Total Bid for 12 Formal Classroom Regional Training Classes

\$ 298,980 (A)

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 *
01	Barbour	5,436.00	2,174.00
02	Berkeley	5,436.00	2,174.00
03	Boone	5,436.00	2,174.00
04	Braxton	5,436.00	2,174.00
05	Brooke	5,436.00	2,174.00
06	Cabell	5,436.00	2,174.00
07	Calhoun	5,436.00	2,174.00
08	Clay	5,436.00	2,174.00
09	Doddridge	5,436.00	2,174.00
10	Fayette	5,436.00	2,174.00
11	Gilmer	5,436.00	2,174.00
12	Grant	5,436.00	2,174.00
13	Greenbrier	5,436.00	2,174.00
14	Hampshire	5,436.00	2,174.00
15	Hancock	5,436.00	2,174.00
16	Hardy	5,436.00	2,174.00
17	Harrison	5,436.00	2,174.00
18	Jackson	5,436.00	2,174.00
19	Jefferson	5,436.00	2,174.00
20	Kanawha	5,436.00	2,174.00
21	Lewis	5,436.00	2,174.00
22	Lincoln	5,436.00	2,174.00
23	Logan	5,436.00	2,174.00
24	Marion	5,436.00	2,174.00
25	Marshall	5,436.00	2,174.00
26	Mason	5,436.00	2,174.00
27	McDowell	5,436.00	2,174.00
28	Mercer	5,436.00	2,174.00
29	Mineral	5,436.00	2,174.00
30	Mingo	5,436.00	2,174.00
31	Monongalia	5,436.00	2,174.00
32	Monroe	5,436.00	2,174.00
33	Morgan	5,436.00	2,174.00
34	Nicholas	5,436.00	2,174.00
35	Ohio	5,436.00	2,174.00
36	Pendleton	5,436.00	2,174.00
37	Pleasants	5,436.00	2,174.00
38	Pocahontas	5,436.00	2,174.00
39	Preston	5,436.00	2,174.00
40	Putnam	5,436.00	2,174.00
41	Raleigh	5,436.00	2,174.00
42	Randolph	5,436.00	2,174.00
43	Ritchie	5,436.00	2,174.00
44	Roane	5,436.00	2,174.00
45	Summers	5,436.00	2,174.00
46	Taylor	5,436.00	2,174.00
47	Tucker	5,436.00	2,174.00
48	Tyler	5,436.00	2,174.00
49	Upshur	5,436.00	2,174.00
50	Wayne	5,436.00	2,174.00
51	Webster	5,436.00	2,174.00
52	Wetzel	5,436.00	2,174.00
53	Wirt	5,436.00	2,174.00
54	Wood	5,436.00	2,174.00
55	Wyoming	5,436.00	2,174.00
	Total Bid	298,980.00 (B)	

*The Evaluation will be based only on the Grand Total of Items A and B. The additional on-site training will not be included in the evaluation process but is to be provided should the State Tax Division choose to provide additional on-site training. If the additional on-site training is provided it will be paid based on the monthly progress and upon the review and approval of the State Tax Division.

Grand Total for A & B

\$597,960.00

PRIVACY NOTICE FOR VENDORS & CONTRACTORS

The West Virginia State Tax Division processes your personal information and those of your employees as needed to establish and maintain a business relationship with your company. Your personal information may be disclosed to other State agencies or third parties in the normal course of business or as needed to comply with laws, including Freedom of Information requests. We are committed to respecting your privacy by handling all of the personal information collected in connection with your contractual employment relationship in accordance with applicable law as well as State of West Virginia Privacy Policies. This notice explains our practices with regard to your personal information.

1. We collect, process, and transfer personal information about our vendors/contractors through computerized and paper-based data processing systems. We have established routine processing functions (such as processing for regular payroll and benefits administration). All processing and transfers of personal information are subject to reasonable confidentiality and privacy safeguards.
2. Any business you have with the West Virginia State Tax Division is treated with the strictest confidentiality and personal information you provide is used only for the purpose specified unless required by law, such as Freedom of Information requests.
3. We process vendor/ contractor personal information for the following purposes: (1) contract recruitment and staffing; (2) administration of compensation; (3) performance management and training; (4) legal compliance and risk management; (5) workplace management and reporting; (6) to protect the West Virginia State Tax Division, its workforce, and the public against injury, theft, legal liability, fraud, or abuse; and (7) other legal and customary business-related purposes.
4. We may process sensitive information (such as race or health information) if it is needed for business objectives or if it is required to comply with applicable law. For example, we may process sensitive health information as needed to accommodate a worker's disability. Sensitive information will not be collected, processed or transferred, except where adequate privacy protection mechanisms.
5. We may disclose your personal information (1) to other State departments and agencies, for the purposes listed above, (2) to data processors, who use the data only for our purposes, (3) to those companies that provide benefits and services to you, (4) where required by law, such as Freedom of Information requests, (5) where permitted by law, such as with your consent or in the event of an emergency.

PRIVACY NOTICE FOR VENDORS & CONTRACTORS

6. You may reasonably access and update your personal information by contacting the West Virginia State Tax Division Purchasing Manager. Please note that we have shared responsibility with regard to the accuracy of your personal information. Please let us know of any changes to your personal information.
7. If you have concerns about how we process your personal information or sensitive information, please contact the West Virginia State Tax Division Purchasing Manager. However, we must process personal information where required by law. In other cases, if we cannot process your information, you may be denied certain benefits.
8. If you believe that your personal information is not handled in accordance with the applicable law or State of West Virginia Privacy Policies, you may submit a complaint to the West Virginia State Tax Division Purchasing Manager. We will investigate the complaint.
9. This notice provides basic information about our processing of your personal information and your privacy rights. Should you have additional questions, you may contact the West Virginia State Tax Division Purchasing Manager.

Purchasing Manager:

Nancy Baire
West Virginia State Tax Division
1001 Lee Street, East
Charleston, West Virginia 25301
(304) 558-0761

Attachment A

Formal Classroom Regional Training Classes

TAX11008

Type of Class	Length of Class	No. of Classes	Location	Comments
IAS Computer Assisted Land Pricing (CALP)	3 days	2	Charleston	Understanding of CALP table development and use, neighborhood delineation and neighborhood factors; influence factors, i.e.: incremental/decremental, homesite enhancement tables, etc. CALP reports, CALP valuation for residential, farm, commercial and industrial property. Depth tables, land grading, land valuation, case studies
		2	Clarksburg Area	
IAS CAMA Residential/Farm Data Collection and Valuation	2-1/2 days	1	Charleston	Understanding of residential and farm real property valuation and data collection, Building modifier development, depreciation table selection, case studies.
		1	Clarksburg Area	
IAS CAMA Commercial/Industrial Data Collection and Valuation	2-1/2 days	1	Charleston	Understanding of commercial, industrial real property valuation and data collection, Building modifier development, depreciation table selection, case studies.
		1	Clarksburg Area	
IAS Sales Ratio Program	2 days	2	Charleston	Understanding of CA181WV sales ratio report, use of the sales ratio report to develop market value, what constitutes a valid sale, sale validation process. Case studies.
		2	Clarksburg Area	

<u>CO. #</u>	<u>COUNTY</u>	<u>CITY</u>	<u>ASSESSOR</u>	<u>PHONE #</u>
01	Barbour	Philippi	John Cutright	457-4952
02	Berkeley	Martinsburg	Preston Gooden	262-8484
03	Boone	Madison	Jennings Miller	369-7319
04	Braxton	Sutton	Arlene Herndon	765-2093
05	Brooke	Wellsburg	Thomas A. Oughton	737-5126
06	Cabell	Huntington	Ottie Adkins	526-8401
07	Calhoun	Grantsville	Jason Nettles	354-9433
08	Clay	Clay	Teresa Lane	587-4481
09	Doddridge	West Union	David Sponaugle	873-3419
10	Fayette	Fayetteville	Eddie Young	574-4312
11	Gilmer	Glenville	Gary Wolfe	462-5134
12	Grant	Petersburg	Ralph Layton	257-4117
13	Greenbrier	Lewisburg	Steve Keadle	647-6667
14	Hampshire	Romney	Norma Wagoner	822-8164
15	Hancock	New Cumberland	Joseph Alongi	564-3415
16	Hardy	Moorefield	Jimmie Wratchford	530-0203
17	Harrison	Clarksburg	Cheryl Romano	626-1066
18	Jackson	Ripley	Brian Thomas	372-4939
19	Jefferson	Charles Town	Angela Banks	728-4034
20	Kanawha	Charleston	Phyllis Gatson	357-0551
21	Lewis	Weston	T. Chad Kelley	269-8202
22	Lincoln	Hamlin	Tracy Dempsey	824-2012
23	Logan	Logan	Rick Grimmatt	792-8542
24	Marion	Fairmont	James P. Priester	366-6532
25	Marshall	Moundsville	Christopher Kessler	845-0530
26	Mason	Point Pleasant	Ron Hickman	675-6358
27	McDowell	Welch	Dennis C. Altizer	436-5230
28	Mercer	Princeton	Bill Blankenship	487-8399
29	Mineral	Keyser	Rose Ann Hanna-Maine	788-4109
30	Mingo	Williamson	Ramona J. Mahon	235-0424
31	Monongalia	Morgantown	Rodney A. Pyles	291-7220
32	Monroe	Union	Donna Huffman	772-4087
33	Morgan	Berkeley Springs	Ronnie McIntire	258-7308
34	Nicholas	Summersville	Ernie Dennison	872-7801
35	Ohio	Wheeling	Kathie Hoffman	232-0293
36	Pendleton	Franklin	Carolyn Sponaugle	358-2473
37	Pleasants	St. Marys	Vickie L. Gorrell	684-9315
38	Pocahontas	Marlinton	Dolan Irvine	799-6132
39	Preston	Kingwood	Terri Funk	329-1643
40	Putnam	Winfield	Sherry Hayes	586-0226
41	Raleigh	Beckley	Drema Bias Evans	255-9111
42	Randolph	Elkins	Phyllis Yokum	636-9474
43	Ritchie	Harrisville	Arlene Mossor	643-2962
44	Roane	Spencer	Emily Westfall	927-4499
45	Summers	Hinton	Greg Vandall	466-7128
46	Taylor	Grafton	Judy Collett	265-3016
47	Tucker	Parsons	Paul "Butch" Burns	478-4464
48	Tyler	Middlebourne	Jack Hayes	758-2126
49	Upshur	Buckhannon	Helen R. Phillips	472-1421
50	Wayne	Wayne	Eric L. Hodges	272-5863
51	Webster	Webster Springs	Dana L. Lynch	847-5371
52	Wetzel	New Martinsville	Ralph E. Phillips	455-5256
53	Wirt	Elizabeth	Debbie Hennen	275-3418
54	Wood	Parkersburg	Richard Shaffer	424-1786
55	Wyoming	Pineville	Mike E. Cook	732-7158



STATE OF WEST VIRGINIA
Department of Revenue
State Tax Department

Attachment C

Rev. 11/2010

Earl Ray Tomblin
Governor

Craig A. Griffith
State Tax Commissioner

CONTRACT EMPLOYEE ACKNOWLEDGEMENT
CONFIDENTIAL TAX INFORMATION

NAME Kelly Real Estate Appraisals / John Kelly
DIVISION _____
Reviewed and _____
Explained by: _____

I understand and acknowledge that information concerning any taxpayer that may come to my knowledge while an employee of the West Virginia State Tax Department is to be held in strictest confidence.

I understand and acknowledge that no information or particular set forth on any return, declaration, application, audit, investigation, film, record, or report filed by or for the taxpayer or concerning a taxpayer will be disclosed by me to any person except as provided by law.

I understand and acknowledge that under State law any unauthorized disclosure of confidential information is punishable by imprisonment for a period up to one year and/or a fine up to \$1,000, together with the cost of prosecution.

I understand and acknowledge that the unauthorized disclosure of any information from a Federal tax return or record received from the Internal Revenue Service is a felony offense punishable by imprisonment for a period up to five years and/or a fine up to \$5,000.

I understand and acknowledge that any unauthorized disclosure of the information described in this statement will result in my immediate dismissal from employment with the West Virginia State Tax Department.

EMPLOYEE SIGNATURE John Kelly DATE 7/30/11
OHIO
State of West Virginia
County of ~~Kanawha~~ BELMONT

Taken, subscribed, acknowledged, and sworn before me this 30th day of JULY, 20 11.



My commission expires LIFETIME COMM'N
JEFFREY W. McCAMIC
Notary Public, State of Ohio
My Commission Expires: Lifetime Commission
[Signature]
Notary Public

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 exceeds 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: Kelly Real Estate Appraisals

Authorized Signature: John Kelly Date: 7/30/11

State of OHIO

County of BELMONT, to-wit:

Taken, subscribed, and sworn to before me this 30th day of JULY, 2011.

My Commission expires LIFETIME COMM, 20 .

AFFIX SEAL HERE

NOTARY PUBLIC [Signature]



JEFFREY W. McCAMIC
Notary Public, State of Ohio
My Commission Expires: Lifetime Commission

State of West Virginia **VENDOR PREFERENCE CERTIFICATE**

Certification and application* is hereby made for Preference in accordance with *West Virginia Code*, §5A-3-37. (Does not apply to construction contracts). *West Virginia Code*, §5A-3-37, provides an opportunity for qualifying vendors to request (at the time of bid) preference for their residency status. Such preference is an evaluation method only and will be applied only to the cost bid in accordance with the *West Virginia Code*. This certificate for application is to be used to request such preference. The Purchasing Division will make the determination of the Resident Vendor Preference, if applicable.

1. **Application is made for 2.5% resident vendor preference for the reason checked:**
 Bidder is an individual resident vendor and has resided continuously in West Virginia for four (4) years immediately preceding the date of this certification; **or**,
 Bidder is a partnership, association or corporation resident vendor and has maintained its headquarters or principal place of business continuously in West Virginia for four (4) years immediately preceding the date of this certification; or 80% of the ownership interest of Bidder is held by another individual, partnership, association or corporation resident vendor who has maintained its headquarters or principal place of business continuously in West Virginia for four (4) years immediately preceding the date of this certification; **or**,
 Bidder is a nonresident vendor which has an affiliate or subsidiary which employs a minimum of one hundred state residents and which has maintained its headquarters or principal place of business within West Virginia continuously for the four (4) years immediately preceding the date of this certification; **or**,
2. **Application is made for 2.5% resident vendor preference for the reason checked:**
 Bidder is a resident vendor who certifies that, during the life of the contract, on average at least 75% of the employees working on the project being bid are residents of West Virginia who have resided in the state continuously for the two years immediately preceding submission of this bid; **or**,
3. **Application is made for 2.5% resident vendor preference for the reason checked:**
 Bidder is a nonresident vendor employing a minimum of one hundred state residents or is a nonresident vendor with an affiliate or subsidiary which maintains its headquarters or principal place of business within West Virginia employing a minimum of one hundred state residents who certifies that, during the life of the contract, on average at least 75% of the employees or Bidder's affiliate's or subsidiary's employees are residents of West Virginia who have resided in the state continuously for the two years immediately preceding submission of this bid; **or**,
4. **Application is made for 5% resident vendor preference for the reason checked:**
 Bidder meets either the requirement of both subdivisions (1) and (2) or subdivision (1) and (3) as stated above; **or**,
5. **Application is made for 3.5% resident vendor preference who is a veteran for the reason checked:**
 Bidder is an individual resident vendor who is a veteran of the United States armed forces, the reserves or the National Guard and has resided in West Virginia continuously for the four years immediately preceding the date on which the bid is submitted; **or**,
6. **Application is made for 3.5% resident vendor preference who is a veteran for the reason checked:**
 Bidder is a resident vendor who is a veteran of the United States armed forces, the reserves or the National Guard, if, for purposes of producing or distributing the commodities or completing the project which is the subject of the vendor's bid and continuously over the entire term of the project, on average at least seventy-five percent of the vendor's employees are residents of West Virginia who have resided in the state continuously for the two immediately preceding years.

Bidder understands if the Secretary of Revenue determines that a Bidder receiving preference has failed to continue to meet the requirements for such preference, the Secretary may order the Director of Purchasing to: (a) reject the bid; or (b) assess a penalty against such Bidder in an amount not to exceed 5% of the bid amount and that such penalty will be paid to the contracting agency or deducted from any unpaid balance on the contract or purchase order.

By submission of this certificate, Bidder agrees to disclose any reasonably requested information to the Purchasing Division and authorizes the Department of Revenue to disclose to the Director of Purchasing appropriate information verifying that Bidder has paid the required business taxes, provided that such information does not contain the amounts of taxes paid nor any other information deemed by the Tax Commissioner to be confidential.

Under penalty of law for false swearing (West Virginia Code, §61-5-3), Bidder hereby certifies that this certificate is true and accurate in all respects; and that if a contract is issued to Bidder and if anything contained within this certificate changes during the term of the contract, Bidder will notify the Purchasing Division in writing immediately.

Bidder: Kelly Real Estate Appraisals

Signed: John Kelly

Date: 7/30/11

Title: President

*Check any combination of preference consideration(s) indicated above, which you are entitled to receive.