

**NORTH CAROLINA  
CHATHAM COUNTY**

**SERVICE CONTRACT**

**THIS CONTRACT** is made, and entered into this the 17th day of December, 2018, by and between the **COUNTY of CHATHAM**, a political subdivision of the State of North Carolina, (hereinafter referred to as "COUNTY"), and **Vincent Valuations LLC** a corporation duly authorized to do business in the state of North Carolina, (hereinafter referred to as "CONTRACTOR").

For and in consideration of mutual promises to each as herein after set forth, the parties hereto do mutually agree as follows:

1. **SCOPE OF SERVICES.** CONTRACTOR hereby agrees to provide the services and/or materials under this contract pursuant to the provisions and specifications identified in "Attachment 1 & 2" (hereinafter collectively referred to as "Services"). Attachment 1 & 2 is hereby incorporated herein and made a part of this contract. Time is of the essence with respect to all provisions of this contract that specify a time for performance.
2. **TERM OF CONTRACT.** The Term of this contract for services is from 12-17-2018 to 9-31-2021 unless sooner terminated as provided herein.
3. **PAYMENT TO CONTRACTOR.** CONTRACTOR shall receive from COUNTY an amount not to exceed One Million Three Hundred Eleven Thousand Three Hundred Dollars (\$1,311,300) as full compensation for the provision of Services. COUNTY agrees to pay CONTRACTOR at the rates specified for Services performed to the satisfaction of the COUNTY, in accordance with this contract, and Attachment 1 (Scope Of Work Proposal). Unless otherwise specified, CONTRACTOR shall submit an itemized invoice to COUNTY by the end of the month during which Services are performed. A Funds Reservation number may be assigned to encumber the funds associated with this contract and must appear on all invoices and correspondence mailed to COUNTY. Payment will be processed promptly upon receipt and approval of the invoice by COUNTY.
4. **INDEPENDENT CONTRACTOR.** COUNTY and CONTRACTOR agree that CONTRACTOR is an independent contractor and shall not represent itself as an agent or employee of COUNTY for any purpose in the performance of CONTRACTOR's duties under this Contract. Accordingly, CONTRACTOR shall be responsible for payment of all federal, state and local taxes as well as business license fees arising out of CONTRACTOR's activities in accordance with this Contract. For purposes of this Contract taxes shall include, but not be limited to, Federal and State Income, Social Security and Unemployment Insurance taxes.

CONTRACTOR, as an independent contractor, shall perform the Services required hereunder in a professional manner and in accordance with the standards of applicable professional organizations and licensing agencies.

5. **INDEMNIFICATION.** To the fullest extent permitted by laws and regulations, CONTRACTOR shall indemnify and hold harmless the COUNTY and its officials, agents, and employees from and against all claims, damages, losses, and expenses, direct, indirect, or consequential (including but not limited to fees and charges of engineers or architects, attorneys, and other professionals and costs related to court action or mediation) arising out of or resulting from CONTRACTOR's performance of this Contract or the actions of the CONTRACTOR or its officials, employees, or subcontractors under this Contract or under contracts entered into by the CONTRACTOR in connection with this Contract. This indemnification shall survive the termination of this Contract.

In claims against any person or entity indemnified under this provision by an employee of the CONTRACTOR, a subcontractor, an employee of a subcontractor, or an agent of the CONTRACTOR or a subcontractor, the indemnification obligation under this provision shall not be limited by a limitation on amount or type of

damages, compensation or benefits payable by or for the CONTRACTOR or a subcontractor under workers' or workmen's compensation acts, disability benefit acts or other employee benefit acts.

**6. INSURANCE.** CONTRACTOR shall procure and maintain for the duration of the contract the following insurance coverage from an insurance company(s) licensed to do business in North Carolina. All of the policies required of the CONTRACTOR shall contain a waiver of subrogation provision to waive all rights of recovery under subrogation or otherwise against the COUNTY. In the event CONTRACTOR'S Insurance Policy or Certificate of Insurance conflicts with the aforesaid language concerning "waiver of subrogation" this contract shall govern. CONTRACTOR shall advise the COUNTY of any cancellation, non-renewal, or material change in any policy within ten (10) days of notification of such action and provide updated certificates of insurance evidencing renewals within fifteen (15) days of expiration. CONTRACTOR'S insurance shall be primary and any insurance or self-funded liability programs maintained by the COUNTY shall not contribute with respect to the CONTRACTOR's insurance. COUNTY shall be listed as an additional insured on any Insurance Policy or Certificate of Insurance of the CONTRACTOR. In the event CONTRACTOR'S Insurance Policy or Certificate of Insurance conflicts with the aforesaid language concerning "additional insured" this contract shall govern.

**6.1 Commercial General Liability:** Insurance Services Office (ISO) Form CG 00 01 on an "occurrence" basis, including products and completed operations, property damage, bodily injury, and personal & advertising injury with limits no less than **\$1,000,000** per occurrence and **\$1,000,000** aggregate.

**6.2 Commercial Automobile Liability:** ISO Form CA 00 01 covering any auto with limit not less than **\$1,000,000** per accident for bodily injury and property damage.

**6.3 Worker's Compensation and Employers Liability:** as required by The State of North Carolina, with statutory limits, and Employers Liability Insurance with a limit of no less than \$1,000,000 per occurrence.

By requiring insurance herein, the COUNTY does not represent that coverage and limits will necessarily be adequate to protect CONTRACTOR, and such coverage and limits shall not be deemed as a limitation on CONTRACTOR's liability under the indemnities granted to the COUNTY in this Contract. CONTRACTOR shall provide the COUNTY a valid certificate of insurance, in advance of the performance of any work, exhibiting coverage required. CONTRACTOR shall require and verify that all subcontractors maintain insurance meeting all the requirements stated herein.

The failure of the COUNTY at any time to enforce the insurance provisions, to demand such certificates of insurance, or to identify a deficiency shall not constitute a waiver of those provisions, nor reduce obligations of the CONTRACTOR to maintain such insurance or to meet its obligations under the indemnification provisions. Notwithstanding the foregoing, nothing contained in this section shall be deemed to constitute a waiver of the governmental immunity of the COUNTY, which immunity is hereby reserved to the COUNTY.

## **7. TERMINATION.**

**7.1. EVENT OF DEFAULT.** Any one or more of the following acts or omissions of the CONTRACTOR shall

constitute an Event of Default hereunder:

- a. Failure to perform the Services satisfactorily or on schedule,
- b. Failure to submit any report required hereunder; and/or
- c. Failure to perform any other covenant, term, or condition of this Agreement.

Upon the occurrence of an Event of Default, the COUNTY may take one or more or all of the following actions:

1. Give CONTRACTOR written Notice of the Event of Default, specifying the Event of Default and requiring it to be remedied within, in the absence of greater or lesser specification of time, seven (7) calendar days from the date of the notice; and if the Event of Default is not timely remedied, terminate the agreement, effective two (2) days after giving the Contractor written Notice of Termination; and/or
2. Deduct any and all expenses incurred by the COUNTY for damages caused by the CONTRACTOR'S Event of Default; and/or
3. Treat the agreement as breached and pursue any of its remedies at law or in equity, or both, including damages and specific performance.

**7.2 TERMINATION FOR CONVENIENCE.** This Contract may be terminated, without cause, by either party upon thirty (30) days written notice to the other party. This termination notice period shall begin upon receipt of the Notice of Termination.

Termination of this Contract, under either section 7.1 or 7.2, shall not form the basis of any claim for loss of anticipated profits by either party.

- 8. COUNTY NOT RESPONSIBLE FOR EXPENSES.** COUNTY shall not be liable to CONTRACTOR for any expenses paid or incurred by CONTRACTOR, unless otherwise agreed in writing.
- 9. EQUIPMENT.** CONTRACTOR shall supply, at its sole expense, all equipment, tools, materials, and/or supplies required to provide Services hereunder, unless otherwise agreed in writing. Computer work stations located within the Chatham County Tax Office will be made available to the CONTRACTOR for the duration of this contract.
- 10. COMPLIANCE WITH LAWS.** CONTRACTOR shall abide by all statutes, rules, regulations, laws, and executive orders Federal, State and Local as they relate to, but are not limited to, (i) services in general, (ii) payment of employees, subcontractors and agents, (iii) the Fair Labor Standards Act and (iv) the Wage and Hour Division. In the event CONTRACTOR is determined by the final order of a court or appropriate agency to be in violation of any Federal, State or Local statute, rule, regulation, law or executive order or this provision, this Contract may be canceled, terminated or suspended in whole or in part by COUNTY and CONTRACTOR may be declared ineligible for further COUNTY contracts.
- 11. HEALTH AND SAFETY.** CONTRACTOR shall be responsible for initiating, maintaining and supervising all safety precautions and programs required by OSHA and all other regulatory agencies while providing Services under this Contract.
- 12. NON-DISCRIMINATION IN EMPLOYMENT.** CONTRACTOR shall not discriminate against any employee or applicant for employment because of age, sex, race, creed, national origin, or disability. CONTRACTOR shall take affirmative action to ensure that qualified applicants are employed and that employees are treated fairly and legally during employment with regard to their age, sex, race, creed, national origin, or disability. In the event CONTRACTOR is determined by the final order of an appropriate agency or court to be in violation of any non-discrimination provision of federal, state or local law or this provision, this Contract may be canceled, terminated or suspended in whole or in part by COUNTY, and CONTRACTOR may be declared ineligible for further COUNTY contracts.
- 13. AUDIT RIGHTS.** For all Services being provided hereunder, COUNTY shall have the right to inspect, examine, and make copies of any and all books, accounts, invoices, records and other writings relating to the performance of the Services. Audits shall take place at times and locations in North Carolina mutually agreed upon by both parties. Notwithstanding the foregoing, CONTRACTOR must make the materials to be audited available within two (2) weeks of the request for them.

**14. DISPUTE RESOLUTION PROCEDURE.** To prevent disputes and litigation, it is agreed by the parties that any claim or dispute between COUNTY and the CONTRACTOR, arising from this Contract or the services and/or materials being provided by the CONTRACTOR, shall be sent to the Chatham County Manager who shall appoint a qualified mediator to address the issue. Such request shall be submitted to the County Manager in writing within ten (10) days of the claim or dispute. Upon receipt of a timely written claim, the Manager, or his or her designee, shall notify the Mediator who will conduct a mediation and notify the CONTRACTOR in writing of the decision within forty five (45) calendar days from the date of the submission of the claim or dispute, unless the Mediator requires additional time to gather information or allow the parties to provide additional information. The Mediator's orders, decisions and decrees shall be non-binding. Mediation, pursuant to this provision, shall be a pre-condition to initiating litigation concerning the dispute. During the pendency of any dispute and after a determination thereof, parties to the dispute shall act in good faith to mitigate any potential damages including utilization of schedule changes and alternate means of providing services and/or materials. The costs of mediation shall be divided equally between parties to the dispute.

The mediation session shall be private and shall be held in Chatham County, North Carolina. Mediation under this provision shall not be the cause for a delay of services and/or materials being provided which is the focus of the dispute.

If the disputed issue cannot be resolved in mediation or either party disagrees with the results of the mediation, the parties may seek resolution in the General Court of Justice in the County of Chatham and the State of North Carolina. If a party fails to comply in strict accordance with the requirements of this provision, the non-complying party specifically waives all of its rights provided hereunder, including its rights and remedies under State law.

**15. EXISTENCE.** CONTRACTOR warrants that it is a Limited Liability Company or other legal entity duly organized, validly existing, and in good standing under the laws of the State of North Carolina and is duly qualified to do business in the State of North Carolina and has full power and authority to enter into and fulfill all the terms and conditions of this Contract.

**16. CORPORATE AUTHORITY.** By execution hereof, the person signing for CONTRACTOR below certifies that he/she has read this contract and that he/she is duly authorized to execute this contract on behalf of the CONTRACTOR.

**17. SUCCESSORS AND ASSIGNS.** CONTRACTOR shall not assign its interest in this Contract without the written consent of COUNTY. CONTRACTOR has no authority to enter into contracts on behalf of COUNTY.

**18. NOTICES.** All notices which may be required by this contract or any rule of law shall be effective when received by certified mail sent to the following addresses:

**COUNTY OF CHATHAM**

**Jenny Williams  
PO Box 908  
Pittsboro, NC 27312**

**CONTRACTOR**

**ATTN: Ryan Vincent  
226 COWAND RD  
Merry Hill, NC 27957**

**19. HEADINGS.** The subject headings of the sections are included for purposes of convenience only and shall not affect the construction or interpretation of any of its provisions. This contract shall be deemed to have been drafted by both parties and no interpretation shall be made to the contrary.

**20. GOVERNING LAW.** This Contract shall be governed by and in accordance with the laws of the State of North Carolina. All actions relating in any way to this Contract shall be brought in the General Court of Justice in the County of Chatham and the State of North Carolina.

**21. ENTIRE CONTRACT.** This contract, including Attachment 1, shall constitute the entire understanding between COUNTY and CONTRACTOR and shall supersede all prior understandings and agreements relating to the subject matter hereof and may be amended only by written mutual agreement of the parties.

**22. COUNTY IDENTIFICATION.** The county shall provide the contractor with county issued identification cards for use in field work.


**IN TESTIMONY WHEREOF,** the parties have expressed their agreement to these terms by causing this Service Contract to be executed by their duly authorized officer or agent.

**COUNTY OF CHATHAM**

\_\_\_\_\_  
Name and Title

Print Name/Title: \_\_\_\_\_

**CONTRACTOR**

By:   
\_\_\_\_\_  
Authorized Representative

Print Name/Title: Ryan L Vincent  
Member/Manager

ATTACHMENT 1, Proposal to Chatham County

ATTACHMENT 2, Questions from Chatham County answered by Vincent Valuations LLC

Attachment #1



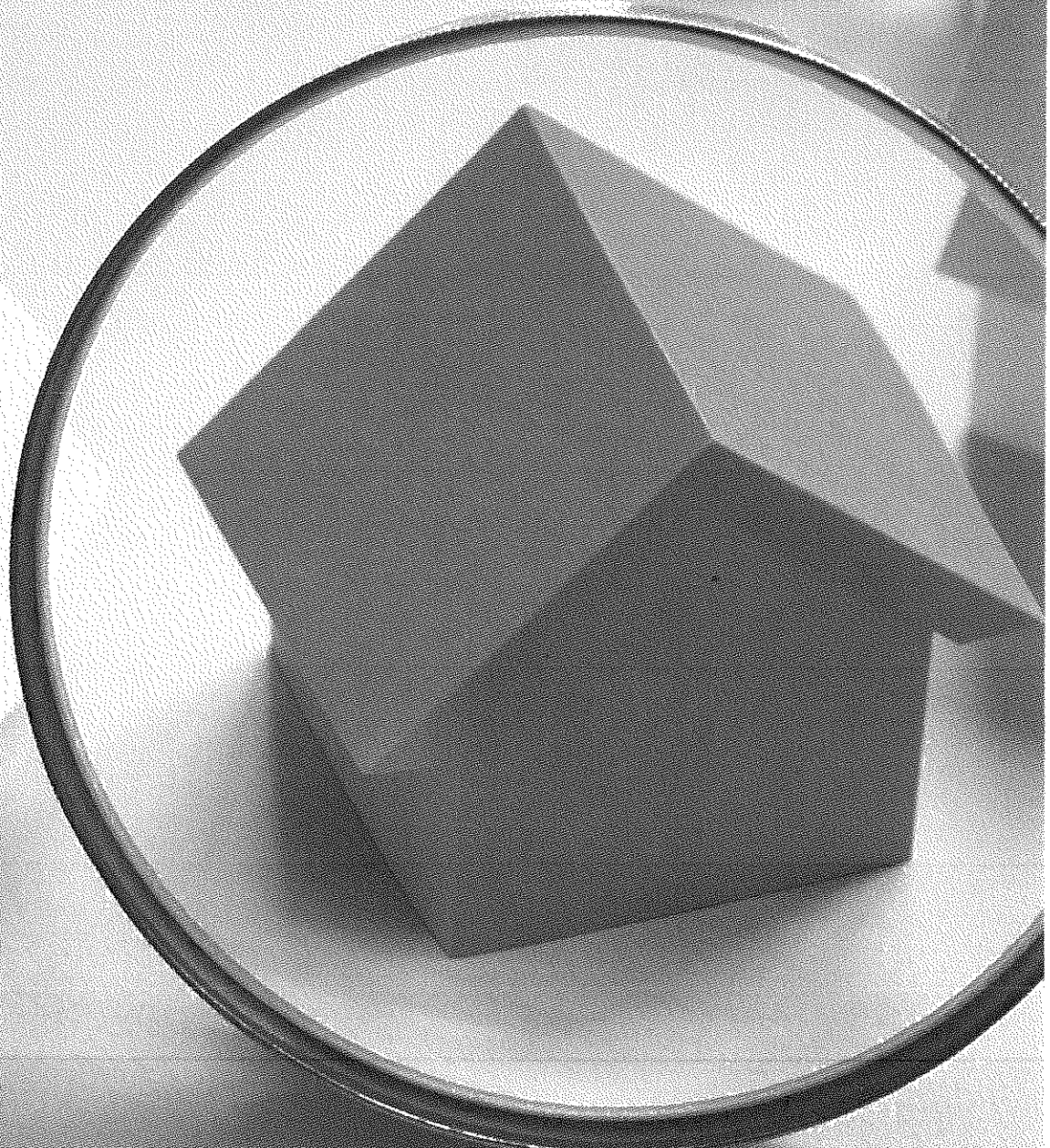
VINCENT  
VALUATIONS

PROPOSAL FOR CHATHAM COUNTY

RESPONSE TO REQUEST FOR  
PROPOSAL

MEASURE & LIST REAPPRAISAL

CHATHAM COUNTY



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CHATHAM COUNTY

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INTRODUCTION  
NOVEMBER 30, 2018



VINCENT  
VALUATIONS

VINCENT VALUATIONS

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Vincent Valuations delivers accuracy in appraisal, ensuring fairness and equity.

Chatham County Tax Office  
Attn: Jenny Williams - Tax Administrator  
12 East Street  
Pittsboro, NC 27312

Dear Ms. Williams,

It was a pleasure meeting with you and your staff. Thank you for the opportunity to provide a proposal to Chatham County for 2021 Revaluation Project.

Vincent Valuations has a respectable understanding of the requirements and needs of the County. Our expertise, services and review processes align and match the goals and expectations discussed.

Our staff has completed and assisted multiple counties with their revaluations. We have developed time tested methods to accurately and efficiently complete full measure and list revaluations ensuring quality, and property attributes are accurately recorded and identified. It is our goal to will work with the county throughout the project, learning your processes and offering any input for improvement practices that will save the county both time and money.

Vincent Valuations understands the sensitive nature of appraisal for the county and its citizens. Accuracy remains at the forefront of Vincent Valuations. We are committed to fair, equitable and accurate appraisal practicum.

Vincent Valuations stands out as a firm in the industry that is well respect, educated, moral and of good standing and character as educators and implementers of accepted reappraisal applications. We are hopeful to work with Chatham County, delivering on your expectations and forming a long standing relationship and partnership for success.

RYAN VINCENT

MANAGER



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# COMPANY PROFILE

## APPRAISAL EXPERTISE

REAPPRAISAL DONE RIGHT

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Vincent Valuations is a North Carolina based firm that focuses specifically on North Carolina local property assessing and reappraisal. With 11+ years of experience in property valuation across the state, our staff is knowledgeable in the market conditions and variables for residential, commercial and industrial valuation.

Vincent Valuations and its experienced appraisers have worked on reappraisal projects in seven states and in over twenty counties. Vincent Valuations brings a unique approach to appraisal practices and standards, having served both the private and public sectors in support of government appraisal.

## OUR AREAS OF EXPERTISE

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### #1 — APPRAISAL EXPERTISE

Vincent Valuations staff offers a combined over 100 years of experience, reappraising hundreds of thousands of residential and commercial properties. Our certified staff are not only up to date with current market trends and conditions - they are educators and respected experts in the industry.

### #2 — NORTH CAROLINA EXPERTISE

Vincent Valuations has provided reappraisal focused on North Carolina Appraisal and Taxation practices for over 11 years. Although we have experience in states throughout the US - North Carolina is our focus.

### #3 — MARKET EXPERTISE

Vincent Valuations remains educated and in the know on current market conditions for each jurisdiction we work in. Our staff continue to participate in on-going education and seminars to remain affluent in all appraisal standards and principles.

### #4 — SOFTWARE SYSTEM EXPERTISE

Vincent Valuations staff have worked with a variety of software appraisal systems such as Cox & Company and Tyler Technologies.

### #5 — PROVEN APPEALS

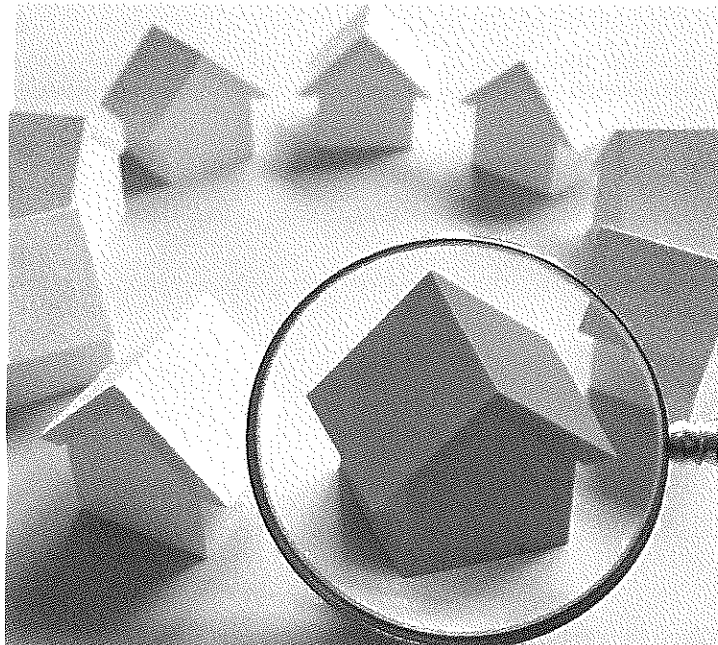
Vincent Valuations offers proven appeals processes, bringing clarity, transparency and the data to back up the reappraisal practices implemented and in use in each county we work in.

### #6 — EDUCATORS

Vincent Valuations staff are known educators within the Appraisal industry. They participate in on-going education and continue to teach their skills and knowledge within IAAO and NC.

### #7 — EXCELLENT STANDARDS

Vincent Valuations is a ethical and moral company that adheres to the highest quality and standards. Our team follows USPAP principles, IAAO standards, NC Law and NC Reappraisal Standards.



## REAPPRAISAL SERVICES DONE RIGHT

### QUALITY

#### MARKET APPRAISAL

Vincent Valuations provides turnkey reappraisal that is fair, accurate and equitable. Our revaluation planning and management and complete reappraisal services are meticulous and fact based.

### DETAILED

#### DATA COLLECTION

Quality data and control over the data is a must. Vincent Valuations provides complete measure and list field assistance, real property assistance, land pricing, neighborhood delineation, data cleansing and preparation.

### EXPERTISE

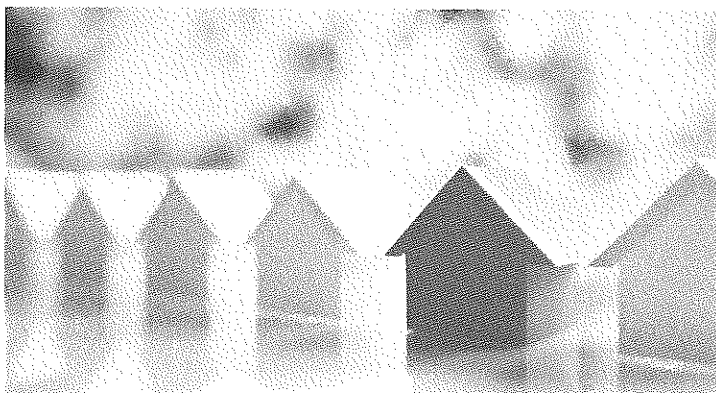
#### DATA REVIEW

Our experienced staff understands the data and the sensitivity of getting it right. We pay close attention to detail in the review and qualification of the data reading it for the schedule of values preparation and value review.

### EQUITY & FAIRNESS

#### HEARING APPEALS

Vincent Valuations provides expert appeal assistance ensuring the final values are reviewed and prepared in order to be defensible and accurate so your jurisdiction provides equity and fairness based on the market.



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## OUR SERVICES QUALIFICATIONS

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Vincent Valuations is a respected and experienced firm that has the following qualifications:

- NC DOR Certified and Registered
- Experienced Field Appraisal Experts
- Member of the International Association of Assessing Officers
- Local North Carolina focused Appraisal Firm
- Extremely proficient in multiple CAMA Software and various property appraisal and taxation solutions used in the industry.
- Staff assigned to Chatham County are certified in mass appraisal by the NC DOR.
- Eleven plus years of property valuation management and appeals experience.

### OUR VISION

Vincent Valuations is becoming a widely respected and known appraisal firm throughout North Carolina and the United States. Our vision is one of longevity, partnering with counties and jurisdictions - providing respected and trusted appraisal and revaluation methods that are accurate, equitable and defensible.

### OUR MISSION

Our Mission is to continue to improve and that is why Vincent Valuations continues to pay for the education and on-going enhancement of their staff and subcontractors. We continue to grow and learn alongside of our counterparts and that has earned us the utmost respect in the mass appraisal realm.

### OUR VALUES

Vincent Valuations protects sensitive data and information, collects information and rechecks to ensure that human error is minimized. We understand the sensitivity of the review and determinations we find. It is our commitment to provide the highest quality value and output that is unmatched in the industry.



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Vincent Valuations was formed to assist local governing entities in mass appraisal, ensuring Fair, Accurate, Equitable Values - serving the public and its constituents. - Ryan Vincent, Founder

## OUR SERVICES

### SCOPE OF WORK

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#### **Measure & List Reappraisal**

##### **Project Scope**

Vincent Valuations will provide Chatham County the following reassessment services discussed in this section.

Vincent Valuations will complete a comprehensive Reappraisal from start to finish. We will provide the physical review, data analysis, market research and its application with respect to our intimate understanding of Chatham County and North Carolina ad valorem appraisal - ensuring fairness, accuracy and equity as we move through each step of the process.

##### **Process Defined**

Our experienced certified field appraisers will visit each property - providing measure, list and site review services. In addition, we will complete a final value review of each property as part of our verification process. At the onset of the project, Vincent Valuations will conduct a project-planning calendar with milestones agreed upon by both Vincent Valuations and Chatham County.

##### **Data Collection and Project Planning**

At the onset of the project, Vincent Valuations will meet with the county to establish the project plan and create the schedule and data collection process. Each element of the project will be defined further to ensure that the scope of work is transparent and in line with the county's goals.

##### **Physical Property Review**

The physical property review will include measuring each main building verifying the data. Vincent Valuations staff will attempt to make contact onsite with an owner or occupant. If no one is available, Vincent Valuations staff will leave a door hanger and proceed to complete the exterior inspection of the property. The exterior inspection includes the measurements of at least 2 sides of each major improvement. During the inspection, Vincent Valuations staff will verify critical valuation data such as - square footage, foundation, basement areas, construction, heating systems, fireplaces, plumbing fixtures, rooms, bedrooms, year built, condition and quality.

Vincent Valuations staff will make notation of the date the property was visited along with the homeowners we have made contact with - if anyone was interviewed at the property. Vincent Valuations will not make interior inspections of any properties other than commercial structures where public access is readily available.

Vincent Valuations will use internal quality control processes to ensure data is collected accurately. A few of these processes include the flipping and review of each appraisers cards at the end of the day by a different appraiser and physical re-measure of a sample of properties by supervisory staff to verify complete accuracy.

Vincent Valuations staff will wear county issued identification badges at all times while conducting field visits and will represent the county in a professional manner.

## **Measure & List Reappraisal**

### **Project Scope Continued**

#### **Photographs**

Vincent Valuations will take a digital photo of all major improvements on the property. These photos and all field cards will become the property of the county. Images will be transferred to the county in a format agreeable to both parties.

#### **Data Entry**

Vincent Valuations will take all data collected from the field and will perform the data entry process, entering it into the county's CAMA system, One Tax Vincent Valuations field staff and clerical staff have a thorough understanding of the One Tax software.

Vincent Valuations requests that the county allow the Vincent Valuations staff to complete data entry both onsite and remotely via VPN access. Vincent Valuations will use internal quality control processes to ensure data is accurately inputted and checked into the system. Identified supervisory staff will review and verify data entered for accuracy to ensure quality of the data.

#### **Appraisal Manual**

A Chatham County appraisal manual will be prepared and used throughout the reassessment.

Vincent Valuations will provide copies of the manual as required by the RFP. The cost of this manual is included in the pricing of the project. Copies of the manual that are issued will remain the property of the county. The manual will document and include the following information as part of the deliverable:

- Principles of Uniform Property Revaluation
- The Appraisal Process
- Characteristics of Value
- Residential Valuation
- Valuation of Outbuilding & other Features
- Commercial and Industrial Valuation
- Depreciation
- Valuation of Land
- Commercial and Industrial Use of Land
- Definition of Terms

Vincent Valuations will work closely with the county in the preparation of the appraisal manual - ensuring a mutual understanding of practices and procedures implemented throughout the reappraisal process.

#### **Sales Review**

Vincent Valuations understands the importance of quality sales data. With this understanding, the company will assist the county in the validation of recent sales dating back two years from the date of reappraisal. Vincent Valuations will categorize the sales by area and property classification. These sales will then be used in development of market value.

Where possible, we will put forth our best effort to interview the property and landowners - further verifying the accuracy of the physical and visual collection and review process.

Our process will be completely transparent to the county and staff that are designated to remain aware of the status throughout the reassessment project.

Sales Ratio Studies will be performed for each property class of house and land - ensuring that all building and land sales have been properly appraised and verified.

#### **Building Sales Review**

The Vincent Valuations qualified appraisers will analyze each property keeping in mind and collecting information on: construction quality, type, age, and location. Digital imagery will be captured and provided to the county, as county property.

#### **Land Sales Review**

The Vincent Valuations qualified appraisers will analyze each land parcel keeping in mind and collecting information on: location, zoning, classification and size. Digital imagery will be captured and provided to the county, as county property.

After building and land data has been identified, collected, documented and reviewed by Vincent Valuations, we will turn our findings over to the county - the information and imagery collected, sales analysis compilation and all documents associated.

#### **Valuation**

Vincent Valuations will be responsible for land valuation. We will use recent land sales to value land. Land will be valued based on best practice methodology for - acres, front foot, square foot and lot pricing. Vincent Valuations will not be responsible for present use valuation, but can assist the county with such.

Vincent Valuations will complete a value review of each parcel in the county. Appraisers will complete this review as a joint field and office effort. The appraiser will review all data characters, valuation methods and any other factors that may influence value. This final value review is essential in making sure consistent application of quality grade, depreciation factors and values are achieved.

Vincent Valuations will use all approaches to value as necessary. For residential the cost and market approaches will be primarily used. For commercial, Vincent Valuations will also consider the income approach to value for properties that are typically traded on an income basis. Income data will be obtained from the market as necessary. The market will also be researched for vacancy, expense rates and capitalization rates. Vincent Valuations will critically analyze the rates. Vincent Valuations appraisers ensure fair and accurate values on all properties.

#### **Appeals**

Vincent Valuations will assist the county with informal appeals, BER appeals and North Carolina Property Tax Commission appeals.

Vincent Valuations has included 50 person days of appeal work in the cost of this proposal. Each additional day of appeals will be billed at a rate of \$750.00 per day.

PROCESS	VV	COUNTY	EXPECTATIONS
CLERICAL	X	X	
DATA ENTRY	X		CHANGES WILL BE MADE IN ONE TAX
PROPERTY RECORD CARDS		X	
OFFICE SPACE		X	
TELEPHONE/INTERNET		X	
PRINTING EXPENSES		X	
CAMA SOFTWARE UPDATES		X	
PUBLIC RELATIONS	X	X	
PROPERTY FIELD VISITS	X		
DIGITAL PHOTOS	X		NEW PHOTOS OF MAJOR IMPROVEMENTS
MOBILE HOMES	X		VV WILL LIST, MEASURE AND APPRAISE MOBILE HOMES LISTED AS REAL PROPERTY
SALES RATIO STUDY	X		
CONSTRUCTION COST ANALYSIS	X		AS APPLICABLE BASED ON PROPERTY USE AND TYPE
INCOME APPROACH	X		
PRESENT USE/LAND USE VALUE		X	
REVIEW ZONING	X		
SCHEDULE OF VALUES	X		
INFORMAL APPEALS	X		50 TOTAL DAYS OF APPEAL WORK INCLUDED, \$750 PER DAY ADDITIONAL
IN-FIELD REVIEW OF INFORMAL APPEALS	X		50 TOTAL DAYS OF APPEAL WORK INCLUDED, \$750 PER DAY ADDITIONAL
GENERATE AND PREPARE NOTICES		X	
POSTAGE		X	
PRINTED MAPS		X	
PROGRESS REPORTS	X		



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## PROJECT TEAM VINCENT VALUATIONS

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Below we have provided an overview of the Vincent Valuations team of qualified residential, commercial, appraisal system and data collection experts. Their resumes follow providing experience, education and relevant certifications.

### **RYAN VINCENT**

MANAGER/COMMERCIAL  
APPRAISER

### **STEVE WISE**

APPRAISAL OPERATIONS  
MANAGER

### **JOHN DEVAULT**

COMMERCIAL APPRAISER

### **BENJAMIN KEATON**

RESIDENTIAL/COMMERCIAL  
APPRAISER

### **MICAH CRUMPLER**

RESIDENTIAL APPRAISER

### **SEAN WILKERSON**

RESIDENTIAL APPRAISER

### **SPENCER FRETWELL**

RESIDENTIAL/ COMMERCIAL  
APPRAISER

### **AMANDA SMITH**

RESIDENTIAL APPRAISER

### **CAMERON WHITE**

RESIDENTIAL APPRAISER

### **ASHLEY COWGELL**

DATA ENTRY TECHNICIAN

### **MEGHAN CARNEY**

RESIDENTIAL APPRAISER/ DATA  
ENTRY TECHNICIAN

### **DAVID CORNELL**

OFFSITE CONSULTANT

# RYAN VINCENT

OWNER

PRESENTATIONS	EXPERIENCE
<p>North Carolina Department of Revenue 2016 Advanced Appraisal Seminar - Commercial Income and Expense Information NCAAO 2016 Fall Conference - Building Data Integrity</p>	<p>Project Manager - Vincent Valuations (2014 - Present)</p> <p>Contracted with multiple counties to assist in reappraisal activities.</p> <p>Revaluation Deputy Assessor - Durham County, NC (August 2014-May 2016)</p> <ul style="list-style-type: none"><li>• Directed the Durham County 2016 General Reappraisal of 110,000 parcels resulting in 6% appeals - Converted residential and commercial data within the One Tax CAMA system to simplify the appraisal process</li><li>• Supervised all residential and commercial valuation</li><li>• Directed a team of 14 county appraisers, 8 contractors and multiple clerical staff in office and field efforts</li><li>• Delineated neighborhoods within the county</li><li>• Completed all residential land valuation</li><li>• Assisted in commercial land and building valuation</li><li>• Worked both residential and commercial value appeals.</li><li>• Completed budget for the appraisal department</li><li>• Participated in community relations meetings regarding the reappraisal both before and after the mailing of the change of value notice.</li><li>• Built residential and commercial cost and income models</li><li>• Developed multiple regression models using the Spatalest program to assist in comparable sales searches.</li></ul>
<p>CERTIFICATIONS</p>	
<p>North Carolina Department of Revenue Certified Member Instructor, International Association of Assessing Officers (IAAO) Certified to teach IAAO 101, 102, 201, 300, 311, 331, 332</p>	

# RYAN VINCENT

CONTINUED

## EDUCATION

- 2001-2005 Waukesha West High School Waukesha, WI
- High School Diploma Earned
- 2004—2008 Waukesha County Technical College Pewaukee, WI
- Real Estate Education Classes including advanced Microsoft office classes while in pursuit of a real estate degree
- Currently working toward IAAO CAE and RES designations
- Completed IAAO instructor training workshop
- Completed 15hr 2016-2017 USPAP, 2016 7 hour update
- Completed IAAO courses 101,102, 201,171,300,311,331,332,801 and 805
- Successfully challenged IAAO courses 112 and 400
- Seminars attended: IAAO Elusive Overall Cap Rate Webinar, IAAO Mass Appraisal Valuation of Restaurants Webinar, Excel for assessors, URISA into to geographic information systems, Property Law and Surveying for Appraisers and Cadastral Mappers, IAAO standards of professional practice and ethics
- Marshall & Swift certified in commercial cost approach appraisal
- Property Tax Listing and Assessing in NC
- UNC School of Government Effective Supervisory Management
- Completed FEMA Independent study courses IS1, IS3, IS100, IS7, IS139, IS 22, IS200, IS 230, IS100HC and 700
- NC DOR state certified contract appraiser & county real property appraiser
- IAAO instate instructor
- Currently Serving on the IAAO Membership Services Committee



# STEVE WISE

APPRAISAL OPERATIONS MANAGER

	EXPERIENCE
<p>Currently licensed as a Georgia State Registered Real Property Appraiser LIC# 352118.            Currently certified as a Real Property Mass Appraiser with the State of NC.            Member of the IAAO (International Association of Assessing Officers). Member ID# 10158812.            Currently have 120+ hours of IAAO education towards my Certified Assessment Evaluator (CAE) license including current U.S.P.A.P. certification.</p>	<p>March 2018 to Present            Vincent Valuations Appraisal Operations Manager</p> <ul style="list-style-type: none"> <li>• Conducts quality control of appraisal projects.</li> <li>• Trains staff in best practices.</li> <li>• Coordinates timelines and deadlines with clients</li> <li>• Review and valuation of both commercial and residential properties.</li> </ul> <p>Jan 2007 to March 2018            Tyler Technologies, Inc. Dayton, OH            Appraisal Project Manager/ Mass Appraisal</p> <ul style="list-style-type: none"> <li>• Conducts data collection, final review, and valuation of Commercial/ Residential properties on mass appraisal projects in Ohio, New Orleans, LA., Oconee County, SC., Hartford, CT., Pittsburgh, PA., Gaston County, NC, Muscogee County, Ga and Jackson Co.GA. Fluent with several CAMA mass appraisal systems including Pro-Val, Win-Gap, and IAS World.</li> </ul> <p>June 2004 to Dec 2006            Kemper Mortgage, Inc., Dayton, OH            Mortgage Broker/ Loan Officer</p> <ul style="list-style-type: none"> <li>• Licensed Mortgage Broker in the State of Ohio from 2004 thru 2006.</li> <li>• Member NAMLO (National Association of Mortgage Loan Officers).</li> <li>• Member of the OAMB (Ohio Association of Mortgage Professionals).</li> <li>• Worked with homeowners and lenders throughout the refinancing process. Including application, loan origination, document verification, appraisal review, and final closing of loan documents with the title company.</li> </ul>
<p><b>CERTIFICATIONS</b></p> <p>Attended Wayne High School and graduated with a 3.0 GPA in June 1987.            Have received extensive certifications throughout my long work history in sales, management, and appraisal practices. All are available upon request.</p>	

# JOHN DEVAULT

COMMERCIAL APPRAISER

C O U R S E S	E X P E R I E N C E
<p>IAAO 101, 102, 151, 201, 207, 300, 301, 302, 400, Workshop on Narrative Appraisal Report Writing.</p>	<p>Real Property Appraiser - Vincent Valuations (August 2018 - Present)</p> <ul style="list-style-type: none"><li>• Appraisal of large commercial properties throughout Durham County.</li><li>• Completed the North Carolina Department of Revenue Examination in the Appraisal of Property for Ad Valorem Purposes</li><li>• Physically visit property sites for the purpose of measuring dimensions and listing real property characteristics of residential structures for tax assessment purposes.</li><li>• Differentiate and identify quality grade, depreciated physical condition, foundation type, roof type, interior/exterior wall type, number/type of rooms, heating/cooling system, types of building attachments, etc. of all real property structures encountered ensuring accurate land and building values..</li></ul> <p>Commercial Valuation Appraiser, Durham County, NC</p> <p>2016-2017 Commercial Valuation Appraiser and Hearing Officer, Franklin County, Ohio</p> <p>2016 Neighborhood and Land Analysis, Development of Land Valuation Models, Development of Commercial Cost Model and Commercial Income Model Development, Muscogee Co. GA</p> <p>2015-2016 Commercial Income and Cost Model Development and Value Review, Washington Co, PA</p>
<b>C E R T I F I C A T I O N S</b>	
<p>NC DOR Certified</p> <p>Residential Case Study Examination - Kansas Dept. of Revenue</p> <p>Commercial Case Study Examination - Kansas Dept. of Revenue</p>	<p>2013-2015 Commercial Valuation Appraiser and Hearing Officer, Cobb County, GA</p> <p>2012 Hearing Officer for Commercial Appeals, Gwinnett County, GA</p> <p>2010-2012 Commercial Valuation Analysis and Review, Supervisor for Commercial Appeals and instructed appraisal courses and training for county staff. Allegheny County, PA</p> <p>2007-2010 Commercial and Residential Supervisor for 170,000 Parcels, Orleans Parish, LA Neighborhood and Land Analysis and Model</p>

# BENJAMIN KEATON

COMMERCIAL/RESIDENTIAL APPRAISER

EXPERIENCE	
<b>COURSES</b>	
IAAO 101, 102, 201, 300	<p>Real Property Appraiser – Vincent Valuations (December 2016 – Present)</p> <ul style="list-style-type: none"><li>• Appraisal of large commercial properties throughout Durham County.</li><li>• Completed the North Carolina Department of Revenue Examination in the Appraisal of Property for Ad Valorem Purposes</li><li>• Physically visit property sites for the purpose of measuring dimensions and listing real property characteristics of residential structures for tax assessment purposes.</li><li>• Differentiate and identify quality grade, depreciated physical condition, foundation type, roof type, interior/exterior wall type, number/type of rooms, heating/cooling system, types of building attachments, etc. of all real property structures encountered ensuring accurate land and building values.</li><li>• Completed Appraisal work on some of the most complex commercial properties in the state of North Carolina.</li><li>• Completed New Construction work in both Residential and Commercial.</li></ul> <p>Lawrence Road Baptist Church (June 2014 – June 2016)</p> <ul style="list-style-type: none"><li>• Oversaw the daily operations of the church office</li><li>• Oversaw the support Ministry Staff</li><li>• Oversaw all Ministries of the church</li><li>• Built ongoing relationships with the community and members through systematic Pastoral Care</li><li>• Communicated effectively through spoken and written formats</li><li>• Initiated and maintained internet and social media presence</li></ul>
<b>CERTIFICATIONS</b>	
NC DOR Certified	
Enrolled in continued Appraisal Education	

# MICAH CRUMPLER

RESIDENTIAL APPRAISER

EXPERIENCE	
COURSES	
IAAO 101, 102, 201, 300	<p>Real Property Appraiser - Vincent Valuations (April 2017 - Present)</p> <ul style="list-style-type: none"><li>• Physically visit property sites for the purpose of measuring dimensions and listing real property characteristics of residential structures for tax assessment purposes.</li><li>• Differentiate and identify quality grade, depreciated physical condition, foundation type, roof type, interior/exterior wall type, number/type of rooms, heating/cooling system, types of building attachments, etc. of all real property structures encountered.</li><li>• Completed Appraisal work in Durham and Pamlico County</li><li>• Assisted in Quality Control Efforts on Multiple Appraisal Projects.</li><li>• Extremely knowledgeable in New Construction Appraisal.</li></ul> <p>Wilmore Electronics (January 2015-April 2017)</p> <ul style="list-style-type: none"><li>• Worked on the construction of power supply equipment from start to finish.</li><li>• Interpreted manufacturing blueprints and mechanical layouts to assemble power supply units.</li><li>• Conducted soldering of PC boards, wires, and electrostatic sensitive devices in final assembly of units.</li><li>• Operated machinery required for production and assembly needs.</li><li>• Received, sorted and stored company hardware and materials.</li><li>• Maintained accurate stock records, dates and schedules.</li></ul>
CERTIFICATIONS	
NC DOR Certified	

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# SEAN WILKERSON

RESIDENTIAL APPRAISER

EXPERIENCE	
COURSES	
IAAO 101, 102	<p>Real Property Appraiser – Vincent Valuations (October 2017 – Present)</p> <ul style="list-style-type: none"><li>• Physically visit property sites for the purpose of measuring dimensions and listing real property characteristics of residential structures for tax assessment purposes.</li><li>• Differentiate and identify quality grade, depreciated physical condition, foundation type, roof type, interior/exterior wall type, number/type of rooms, heating/cooling system, types of building attachments, etc. of all real property structures encountered.</li><li>• Completed Appraisal work in Durham County.</li><li>• New Construction Appraisal work completed.</li></ul>
CERTIFICATIONS	
NC DOR Certified	



# SPENCER FRETWELL

RESIDENTIAL/COMMERCIAL APPRAISER

EXPERIENCE	
COURSES	
IAAO 101, 102, 201	<p>Real Property Appraiser – Vincent Valuations (April 2017 – Present)</p> <ul style="list-style-type: none"><li>• Enrolled and taking Appraisal Courses for continued education.</li><li>• Physically visit property sites for the purpose of measuring dimensions and listing real property characteristics of residential structures for tax assessment purposes.</li><li>• Differentiate and identify quality grade, depreciated physical condition, foundation type, roof type, interior/exterior wall type, number/type of rooms, heating/cooling system, types of building attachments, etc. of all real property structures encountered.</li><li>• Completed Appraisal work in Durham County.</li><li>• Measures and appraises large commercial buildings ensuring accuracy and detail.</li><li>• Completed New Construction Appraisal work.</li></ul> <p>Bay Leaf Baptist Church (August 2016 – April 2017)</p> <ul style="list-style-type: none"><li>• This job required me to clean the campus, work with a team, work on projects independently, and set up for events. I kept stock on cleaning items and equipment. In this job, I took measurements of various objects around the campus.</li></ul>
CERTIFICATIONS	
NC DOR Certified	

# A M A N D A S M I T H

RESIDENTIAL APPRAISER

E X P E R I E N C E	
C O U R S E S	
IAAO 101, 102, 300	<p>Real Property Appraiser – Vincent Valuations (March 2017 – Present)</p> <ul style="list-style-type: none"><li>• Expert in OneTax and very computer proficient</li><li>• Experienced sketching of complex commercial and residential properties</li><li>• Completed the North Carolina Department of Revenue Examination in the Appraisal of Property for Ad Valorem Purposes</li><li>• Physically visit property sites for the purpose of measuring dimensions and listing real property characteristics of residential structures for tax assessment purposes.</li><li>• As an expert in the computer programs used at Vincent Valuations, Amanda trains on how to effectively work property tax records, measure and draw sketches of properties for data entry and how to proficiently use the CAMA software to assist Appraisers in accurate Property Valuation.</li><li>• Field Appraisal and data entry work in Durham County and Rockingham County.</li><li>• Completed complex review work in Downtown Durham, NC.</li></ul> <p>Administrative Assistant Capitol Police (January 2012- February 2017)</p> <ul style="list-style-type: none"><li>• Oversaw daily administrative paperwork and setup of new accounts</li></ul>
C E R T I F I C A T I O N S	
NC DOR Certified  Enrolled in continued Appraisal Education	



# C A M E R O N   W H I T E

R E S I D E N T I A L   A P P R A I S E R

E X P E R I E N C E	
	<p>Real Property Appraiser – Vincent Valuations (February 2018–Present)</p> <ul style="list-style-type: none"><li>• Physically visit property sites for the purpose of measuring dimensions and listing real property characteristics of residential structures for tax assessment purposes.</li><li>• Differentiate and identify quality grade, depreciated physical condition, foundation type, roof type, interior/exterior wall type, number/type of rooms, heating/cooling system, types of building attachments, etc. of all real property structures encountered.</li><li>• Completed Appraisal work in Durham County.</li><li>• Completed New Construction Appraisal work.</li></ul>
C E R T I F I C A T I O N S	
NC DOR Certified	

# ASHLEY COWGELL

DATA ENTRY TECHNICIAN

EXPERIENCE	
COURSES	
	<p>Real Property Appraiser - Vincent Valuations (June 2018 - Present)</p> <ul style="list-style-type: none"><li>• Expert in CAMA Softwares and very computer proficient</li><li>• Experienced sketching of complex commercial and residential properties</li><li>• Completed the North Carolina Department of Revenue Examination in the Appraisal of Property for Ad Valorem Purposes</li><li>• As an expert in the computer programs used at Vincent Valuations, Ashley trains on how to effectively work property tax records, measure and draw sketches of properties for data entry and how to proficiently use CAMA software to assist Appraisers in accurate property valuation.</li><li>• Data Entry work in Durham County, Pamlico County and Rockingham County.</li><li>• Entered and assisted in some of the most complex properties in the state of North Carolina.</li></ul>
CERTIFICATIONS	
NC DOR Certified	

# MEGHAN CARNEY

DATA ENTRY TECHNICIAN/RESIDENTIAL

APPRAISER

## EXPERIENCE

Real Property Appraiser - Vincent Valuations (July 2018 - Present)

- Physically visit property sites for the purpose of measuring dimensions and listing real property characteristics of residential structures for tax assessment purposes.
- Differentiate and identify quality grade, depreciated physical condition, foundation type, roof type, interior/exterior wall type, number/type of rooms, heating/cooling system, types of building attachments, etc. of all real property structures encountered.
- Completed Appraisal work in Pamlico County.
- Expert in OneTax and very computer proficient
- Experienced sketching of complex commercial and residential properties
- Physically visit property sites for the purpose of measuring dimensions and listing real property characteristics of residential structures for tax assessment purposes.
- As an expert in the computer programs used at Vincent Valuations, Meghan trains on how to effectively work property tax records, measure and draw sketches of properties for data entry and how to proficiently use CAMA software to assist Appraisers in accurate property Valuation.
- Field Appraisal and data entry work in Pamlico County.

# DAVID CORNELL

OFF SITE CONSULTANT

## EXPERIENCE

• President – Cornell Consultants, Manchester, NH (2016 – Present)

Focused on helping government agencies maximize their potential through technology and professional development. David brings 17 years of experience as an Appraiser at progressive levels of responsibility.

Assistant Director, Municipal and Property Division - NH Department of Revenue Administration, Concord, NH (2010-2016)

Lead initiatives in educating municipalities regarding the proper methodology and techniques of appraisal and assessment of real property.

Oversee all property assessments practices in New Hampshire.

Perform statistical test to determine the level of quality and accuracy for revaluations completed for assessing districts.

Assist in the statewide equalization process.

Manage the valuation of commercial and utility properties.

Directed a staff of 28 employees including hiring team members and ensuring goals and objectives were adhered to.

## CERTIFICATIONS

Appraisal Institute Designated Member- MAI Designation  
Appraisal Institute NH Chapter- President (2017 - present)  
Appraisal Institute NH Chapter- Board of Directors (2014 - present)  
International Association of Assessing Officers- Certified Assessment Evaluator (CAE)  
International Association of Assessing Officers- Senior National Instructor

Train and evaluate the efficiency and productivity of team members by establishing performance standards and objectives.

Provide training and development of team members monitoring goals and providing feedback.

Chairman of the Board of Assessors, City of Manchester, Manchester, NH (2006-2010)

Oversaw approximately 32,000 properties in the City of Manchester, equaling \$10 billion in market valuation.

# DAVID CORNELL

OFF SITE CONSULTANT

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## EXPERIENCE

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Performed statistical analysis of assessments to determine uniformity and equity.

Voted on all tax abatement cases.

Advised the Mayor and the Board of Aldermen on real estate valuation and acquisition issues.

Awarded "Key to the City" in 2009 by Mayor Frank Guinta for working "honorably and with great distinction."

Handled public relations including numerous newspaper, radio, and TV interviews.

Developed a successful internship program.

Commercial Appraiser - City of Manchester, Manchester, NH (2003-2006)

Identified, listed, and appraised commercial property for tax purposes.

Measured, listed and valued new construction projects.

Prepared appraisals for tax appeal cases, appearing as an expert witness before the Board of Tax and Land Appeals and Superior Court (residential, commercial, and industrial properties).

Developed a process that automated sections of appraisal reports.

Developed valuation analytic tools using geospatial analysis

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## CURRENT CLIENT LIST & COMPLETED PROJECTS

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### **DURHAM COUNTY, NC**

#### **WORK PERFORMED**

Commercial Training, commercial Appeals, residential data collection, neighborhood delineation, commercial data collection, commercial data conversion in One Tax, commercial valuation, schedule of value development assistance, statistical testing, commercial data entry into One Tax CAMA system. Commercial and Residential New Construction Appraisal.

**KIMBERLY SIMPSON - 919-560-0306**

### **MECKLENBURG COUNTY, NC**

#### **WORK PERFORMED**

Appraisal Consulting, Data Analysis

**CHRISTY LANTIS - 704-336-7600**  
**DIVISION DIRECTOR**

### **MONTGOMERY COUNTY, NC**

#### **WORK PERFORMED**

Appraisal Consulting.

**VICKIE MANESS - 910-576-4311**  
**TAX ADMINISTRATOR**

### **CHOWAN COUNTY, NC -**

#### **WORK PERFORMED**

Residential and commercial new construction appraisal

**MELISSA RADKE - 252-482-9837**  
**TAX ADMINISTRATOR**

### **ROBESON COUNTY, NC**

#### **WORK PERFORMED**

Appraisal Review and Consulting

**CINDY LOWERY - 910-671-3060**  
**TAX ADMINISTRATOR**

### **HENDERSON COUNTY, NC**

#### **WORK PERFORMED**

Appraisal Consulting, Data Analysis

**DARLENE BURGESS - 828-697-4870**  
**TAX ADMINISTRATOR**

### **PAMLICO COUNTY, NC**

#### **WORK PERFORMED**

Complete Measure and List Reappraisal (in-process). Commercial and Residential New Construction Appraisal.

**SARAH DAVIS - 252-745-3791**  
**TAX ADMINISTRATOR**



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## CURRENT REFERENCES

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### **DURHAM COUNTY, NC - CLIENT**

919-560-0306

**KIMBERLY SIMPSON**  
TAX ADMINISTRATOR

### **CHOWAN COUNTY, NC - CLIENT**

252-482-9837

**MELISSA RADKE**  
TAX ADMINISTRATOR

### **NC DOR GENERAL COUNCIL-REFERENCE**

252-532-7082

**STEPHEN PELFREY**

### **CURRITUCK COUNTY, NC- REFERENCE**

252-232-6037

**TRACY SAMPLE**  
TAX ADMINISTRATOR

### **ALEXANDER COUNTY, NC - REFERENCE**

828-632-4346

**DOUG FOX**  
ASSESSOR

### **UNC SCHOOL OF GOVERNMENT - REFERENCE**

919-397-7846

**KIRK BOONE**

### **HENDERSON COUNTY, NC - CLIENT**

828-697-4870

**DARLENE BURGESS**  
TAX ADMINISTRATOR

### **PAMLICO COUNTY, NC - CLIENT**

252-745-3791

**SARAH DAVIS**  
TAX ADMINISTRATOR

### **ROBESON COUNTY, NC- CLIENT**

910-671-3060

**CINDY LOWRY**  
TAX ADMINISTRATOR

### **MECKLENBURG COUNTY, NC CLIENT -**

704-336-7600

**CHRISTY LENTIS**  
TAX ADMINISTRATOR

### **YADKIN COUNTY, NC REFERENCE -**

336-849-7903

**CLAYTON CAMPBELL**  
TAX ADMINISTRATOR

# PROJECT COST BREAKDOWN

## Detailed Cost Quotation

Below is Vincent Valuations cost quote for Chatham County 2021 County Revaluation Project.

PROPERTY APPRAISAL PROPOSAL	PRICING
Full Measure and list reappraisal including exempts.	\$1,311,300 \$29.25 per parcel based on an estimated parcel count of 44,831
Full Measure and list reappraisal excluding exempts	\$1,277,600 \$28.50 per parcel based on an estimated parcel count of 44,831
Taxpayer Appeals	Vincent Valuations will assist the county with informal appeals, BER appeals and NC Property Tax Commission appeals. Vincent Valuations has included 50 days of appeal work in the cost of this proposal. Each additional day of appeals shall be billed at a rate of \$750.00 per day.

### Proposal Submitted By:

**Company:** Vincent Valuations

**Name:** Ryan Vincent, Manager

**Phone:** 414-531-3711

**Email:** vincentvaluations@gmail.com

## Attachment #2



VINCENT  
VALUATIONS

- Will this be a complete re-measure of all structures and appendages (porches, decks, detached buildings, etc.) to the structures? It looks like it is a modified walk around by measuring at least two sides of main structures to catch anything major?
  - This will be a complete measure and list as we discussed. We will measure accessible buildings and attachments such as decks, porches and all accessible out buildings. We will not measure behind fences or go through gates however with our laser tapes we can reach over the fence to obtain measurements where possible.
- It was mentioned that only mobile homes considered to be real estate will be re-measured. I know all of the mobile homes that are considered personal property in Chatham are currently measured and sketched by the appraisers and not revalued and depreciated each year. If they are personal property they would typically be re-valued each year as other personal property items.
  - We will measure mobile homes which are considered by the county to be real property. This is typically doublewide mobile homes on a permanent foundation with the hitch and axles removed that sit on land owned by the owner of the building. We would be glad to assist the county in the measurement and verification of personal property mobile homes however that was not included in the initial proposal.
- It mentions that they are responsible for the Schedule of Values (SOV). Does that include defending the SOV if it is appealed and the Present Use Value (PUV) is also required to be included.
  - We will be responsible for the SOV preparation and defense should it be appealed. We will work with the county on the adoption of the PUV schedules. Typically, it is the counties decision as to what rates to use for PUV. The DOR publishes PUV guidance annually what is what most counties adopt.
- Good to have weekly, by weekly, or monthly progress reports and meetings showing planned progress, variances to the



**VINCENT**  
VALUATIONS

plan by activity and plans to catch up an activity that is falling behind.

- We have no issue with scheduling status meetings.
- Photos should include parcel number and date taken.
  - This should not be a problem.
- Are they providing their own transportation (looks like it)?
  - Yes, we provide our own transportation.
- Will they assist in fielding calls from the public from the door hangers and from the reval notice of value mailing?
  - This was not something that was discussed, but I don't see any issues with assisting the county with phone calls related to reappraisal.
- Will there be a full time on site manager?
  - Yes
- They might need to go back on qualified sales further than two years (from 1/1/2021). In some instances they will probably need to go back further to establish time adjustment factors (TAF) to factor sales to the appraisal date for inflation or deflation during all of their analysis and some neighborhoods may not have sufficient sales to only look at two years back.
  - I agree depending on the area, property type and amount of valid sales.
- Does the 50 person days of appeal support include 50 person days of office reviews of mail in appeal forms or appointments and 50 person days of field checks also (total of 100 person days), or is there just 50 person days total for all appeal support? I think it is 50 total days.
  - This is 50 days total to be used in whatever way the county should decide.
- Will the county be responsible for sending appeal result letters?
  - All notices and mailing in this proposal will be the responsibility of the county, however we could revisit this topic if need be.
- Are you going to have appeal forms to return as part of the notice of value, or are you going to just schedule informal appeal appointments? I am thinking you will have from 2,500 to 3,500 informal appeals.



**VINCENT**  
VALUATIONS

- The final decision on this topic is that of the Tax Administrator. We can offer advice from previous experience and offer templates for notices to assist in this decision.
- **Will they observe the same office/field hours on site as the county and are they okay to be off on the same holidays that the county observes?**
  - We typically work an 8 hour day from 8am to 4:30pm with a 30 minute lunch break however this schedule could be changed as needed. We observe the same holidays as the county.
- **If they find major errors during their re-measure, will you only correct them for the reval year, or will you correct for the current year you are in and forward? Need to establish guidelines.**
  - This would be something we would need to decide in our initial meetings before we head to the field.
- **Will they run final edits towards the end of the reval to look for large value swings (up or down) per property, per geographic areas, per property type, etc.?**
  - Yes, this is something we always do.
- **Will they set up edit reports in one tax for county staff to continually run to do their own quality control and also train county staff in areas they are not familiar with to use the one tax system efficiently.**
  - Yes, we run edits throughout the review process. We can save these edits to a shared library within OneTax so the county staff can continually run them in subsequent years after the reappraisal. We can also assist in training the county on the design and use of these edits.
- **Will they run ratio reports at the end of the project to make sure they have accurately estimated inflation and deflation since the time the sales were analyzed?**
  - Yes, this is something we always do.
- **Will they participate in public education presentations?**
  - Absolutely, this is a very important part of a reappraisal. We typically do this about 1-2 months before the notices are mailed.



VINCENT  
VALUATIONS

- Will you be allowed to approve or disapprove who is brought on site and what is the process to remove a staff member that you feel is not doing the job you expected?
  - Yes. Should the county have any issues with any staff members we ask that they are brought to our attention right away so we can address them or remove that staff member from the project.
- How will you determine what properties will be reviewed from the office vs the field on the final valuation review?
  - Typically if we do a joint field/office review we start reviewing in the office and any difficult neighborhoods, complex properties, areas of rapid growth or change are areas sent to the field.
- The SOV should include a list of items that are considered personal property vs real property.
  - We have a chart we include in the SOV that states this. We would go over it with the county for approval before entering it into the SOV
- The SOV should include commercial and industrial ranges for rental income, expense rates, vacancy rates and cap rates by property types.
  - This is not a problem.