



COMMONWEALTH OF VIRGINIA
County of Henrico

DEPARTMENT OF FINANCE
Oscar Knott, CPP, CPPO, VCO
Purchasing Director

RFP No. 23-2535-5EMF

June 7, 2023

Request for Proposal ("RFP")
Printing & Mailing Service for the Department of
Finance

Your firm is invited to submit a proposal to provide printing and mailing services in accordance with the enclosed Specifications and General Terms and Conditions. Pursuant to Section 2.2-4304 of the Code of Virginia, this procurement is a cooperative procurement being conducted on behalf of Henrico County and other public bodies.

Your firm's proposal submittal, **consisting of one (1) complete electronic copy and one (1) redacted electronic copy (if applicable) in a "pdf" format**, will be received no later than **July 12, 2023 by 2:00 p.m.** submission through the Commonwealth of Virginia's electronic procurement platform [eVA](#).

Time is of the essence, and any offeror that attempts to submit a proposal after the appointed hour for submission, will be unable to, because eVA automatically closes the solicitation at the appointed time. The time of receipt shall be determined by the time clock in eVA. Offerors are responsible for ensuring that their proposals are submitted in eVA by the deadline indicated.

Nothing herein is intended to exclude any responsible offeror or in any way restrain or restrict competition. On the contrary, all responsible offerors are encouraged to submit proposals. The County of Henrico reserves the right to accept or reject any or all proposals submitted.

Pursuant to Henrico County Code Section 16-43, the award will be made by the Purchasing Director.

This RFP and any addenda are available on the County of Henrico website at: <http://henrico.us/finance/divisions/purchasing>, and on eVA at <https://eva.virginia.gov/>.

Should you have any questions concerning this RFP, please contact Eileen M. Falcone no later than **June 20, 2023**.

Very truly yours,

Eileen M. Falcone, CPPB
Assistant Division Director

I. INTRODUCTION

A. Purpose

The intent and purpose of this Request for Proposal (“RFP”), and the resulting contract, is to obtain services from a qualified firm to provide printing and mailing services in accordance with the Scope of Services section of the solicitation.

B. Background

Henrico County is the sixth largest locality by population in the Commonwealth of Virginia and is located in the metropolitan Richmond area. It features a land area of 244 square miles and consists of both highly developed urban and suburban areas, and undeveloped agricultural and forested land. Henrico’s population stands at approximately 339,200.

The County has a County Manager form of government where the County Manager functions like a corporate CEO. A five-member Board of Supervisors, elected by magisterial district, acts like a board of directors and has responsibility for appointing the County Manager. The County maintains AAA bond ratings from Moody’s, Standard and Poor’s, and Fitch IBCA, and has maintained AAA ratings continuously since 1977.

The County is responsible for providing all services normally provided by a local government. These services include fire and police protection, social services, and mental health, planning and building inspections, public works (roads, drainage and traffic), public utilities (water and wastewater, solid waste and streetlights), libraries and recreation, schools and general government administration. County services are supported by the assessment and collection of tax revenue, which are performed by Finance.

The Finance Department’s objectives are as follows:

- To equitably and accurately assess all real estate and certain personal property located in the County.
- To review, assess, bill, and collect all taxes, licenses, and fees in the County in conformance with all local, state, and federal regulations.
- To provide appropriately secured yet accessible property tax information for the taxpayers of Henrico County.
- To continually improve customer service for both internal and external customers.
- To maintain complete and accurate accounting records for the County.
- To maintain the County’s triple AAA bond ratings through sound financial management, the accurate recording of financial activity, and the timely preparation of the Annual Comprehensive Financial Report (ACFR).
- To prepare, administer, and monitor the operating and capital budgets of the County.
- To procure goods and services required by County departments and schools at the lowest price in a legally responsible manner.
- To protect the county against losses that could significantly impact its personnel, property, or financial stability.

The Finance Department is located in the Henrico County Administration Building at 4301 E. Parham Road, Henrico, Virginia 23228. The department is responsible for the overall management of the county’s bill printing and mailing services contract for the county’s real estate tax and personal property tax bills and notices.

The Treasury Division is part of the Henrico County Finance Department. The Treasury Division is responsible for accurately billing and collecting Real Estate and Personal Property taxes. According to the Code of Virginia, §58.1-3912, these bills must be mailed in a reasonable timeframe to allow the taxpayers adequate time to pay. Attached is a schedule of the types of mailings, and the average amount mailed. (**Attachment G**)

The Real Estate Division is also part of the Henrico County Finance Department. The Real Estate Division is responsible for maintaining the County's Land Book and assessing all real property annually for tax purposes. Attached is a schedule of the types of mailings, the time period of mailings, and the amount mailed in tax year 2022. (**Attachment G**)

C. Current Process for Personal Property and Real Estate Tax Bills – (copies of all bills and envelopes are provided as (**Attachment I**))

The Treasury Division manages the County's tax data using PCI, LLC (a Catalis Company) third-party billing software which generates fourteen billings per year (**Attachment G**). For each billing, a data file is transmitted to the county's current provider for printing and/or image only generation. The file contains a field indicator for which bills are to be printed or imaged only (e-bill customers), see **Attachment H** for the file format. The current vendor uses county-approved billing templates (determined by the bill type) that are populated with the transmitted data. The vendor will send a small image file sample for review and approval each billing prior to printing and mailing. Once approved, the current provider will print the bill file using 8 ½ x 11, 24lb, plain white paper (and black ink) with a perforation that is 3.5 inches from the bottom (**Attachment I**). Color is used for the County logo and for highlighted areas on the bill. A separate color is used to distinguish real estate and personal property bills. Color to highlight some text is also required. Additionally, the current provider creates a .csv tab delimited manifest file for export to the current credit card payment and bill presentment provider (Paymentus), that allows customers to pay their bills online and view images of their bill.

1. The top of the Personal Property Installment, Past Due, and supplemental tax bills have the following information:
 - bill type
 - County's logo and address
 - customer's account number
 - customer's name
 - customer's address
 - bill number
 - bill date
 - due date
2. The body of the Personal Property installment, past due and supplemental bills display relevant tax details on assessed items, the balance due, personal property tax relief information (installment and supplemental bills), and collection action information for unpaid balances (past due bills). There is a conditional text box that changes depending on the type of bill or other attributes passed in the file. The body of the Personal Property Past Due bill informs the customer that a \$25 vehicle registration stop has

been placed on their DMV account for outstanding past due balance(s).

3. The top of the Personal Property Past Due has the following information:
 - County's logo and address
 - bill type
 - customer's account and address information.

4. The bottom of each tax bill and notice is perforated and includes the following information:
 - County's logo and address
 - Return address change box (address change information is provided on the back of the coupon)
 - Invoice number and barcode
 - customer's address
 - scanline for lockbox processing
 - customer's account number
 - amount due
 - due date
 - Amount enclosed (amount to be filled in by the customer)
 - lockbox address (return address)
 - A timely payment receipt note

5. To assist with their closed-loop automated render and mail process, the current provider uses a QR code, located on the front of the bill beside the customer's name. Personal property installment bills with a vehicle registration hold on their account have a "V" indicator beside the "amount enclosed" section of the coupon. The back of the bills and notices have the Finance Division's contact information, billing and proration information, due date, penalty and interest information and payment options.

6. The top of the Real Estate tax bills and notices have the following information:
 - bill type
 - County's logo and address
 - property owners as of January 1st
 - account number
 - bill installment
 - mortgage code
 - bill date
 - due date
 - district
 - property location
 - bill number
 - legal description
 - parcel identification number

7. The body of the Real Estate Installment, past due and supplemental bills display the following tax information:
 - ASSESSMENT DATA
 - Land
 - Land Use
 - Improvement
 - Abatement
 - Total
 - TAX COMPUTATION
 - Tax rate
 - Annual Tax
 - CREDITS
 - REAP (Real Estate Advantage Program)
 - CURRENT TAX DUE
 - 1ST half
 - 2nd half
 - Current Penalty
 - Current Interest
 - DELINQUENT TAXES
 - Year
 - Tax
 - Penalty
 - Interest
 - Other fees
 - Special liens
8. Each Real Estate bill contains a note in the body instructing the customer to see the reverse side for additional REAP information, the amount due per installment, the penalty and interest for late payments. There is also a conditional text box that changes depending on the type of bill or other attributes passed in the file. Additionally, the body of the Real Estate Supplemental bill identifies the bill as a revision for a particular invoice and provides assessment details, reason for the change and effective date. The body of the Real Estate Collection Action Notice warns the customer that failure to pay their past due balances could result in additional collection action. It also gives them the Finance Division's telephone number and hours of operation, and total delinquent amount due.
9. The bottom of each Real Estate tax bill and notice is perforated and includes the following information:
 - County's logo and address
 - return address change box (address change information is provided on the back of the coupon)
 - payment instructions
 - invoice number and barcode
 - property owner's address
 - scanline for lockbox processing
 - customer's account number
 - amount due

- due date
 - amount enclosed (amount to be filled in by the customer)
 - lockbox address (return address)
 - A timely payment receipt note
10. QR codes are positioned on the front beside the property owner's name. The back of the bills and notices have the Finance Division's contact information, billing and proration information, due date, penalty and interest information and payment options.
 11. The Real Estate Assessment notices display the Real Estate division information and the division director's name, the property owner's name and address, parcel description and ID number. The body identifies the reason for the assessment revision and prior and current assessments. Additional mailing functionality for Real Estate Assessment Notices ONLY includes House Holding, i.e. if property owner name and address are the same, then multiple assessment notices are included in a single envelope.
 12. The Personal Property and Real Estate tax bills are mailed in a plain white, security tint, #10 double window envelope (flush left), which allows both the mailing and return address to show. A #9 plain white, single window (flush right) return envelope with security tint is also included with the bill.
 13. The mailing envelope has a First-Class Mail Presorted, US Postage Paid printed stamp; and the #9 return envelope has a "PLACE STAMP HERE" place filler. First installment bills are mailed over the course of 3 days and second installment bills are mailed over a 2-day period.
 14. The current vendor provides the County with access to an online portal to review and approve proofs, review invoices, track outbound bills and inbound lockbox mailed payments.

II. SCOPE OF SERVICES

The Successful Offeror shall provide all labor, materials, equipment, and supervision necessary to provide the following services during the term of the contract awarded pursuant to this RFP.

A. General Requirements

The Successful Offeror shall meet the following minimum general requirements:

1. Provide customer support to County staff during its regular business hours of Monday through Friday from 8:00 A.M. to 4:30 P.M. Eastern Standard Time.
2. Provide an account representative for daily communication during the printing and mailing process. The account representative shall be able to perform routine support work such as canceling an uploaded file or pulling a printed document before it is mailed.
3. Operate under SSAE18 standards with a SOC 2 Type II report.
4. Purchase and store all printing materials, including bill paper and envelopes and provide a climate-controlled environment to store these items.
5. Obtain the bulk mail permit from the United States Postal Service (USPS) and invoice the County monthly according to usage.

6. Provide a web-based portal to track the status of job types, view reports, and upload and view test files.
7. Provide a web-based customer facing electronic bill presentment portal that will allow taxpayers the capability to view all tax bills and notices with an integrated “click-to-pay” payment option.
8. Portal access should be available to designated County staff with the capability to access outbound and inbound delivery scans at all scanning points throughout the mailing and delivery process.
9. Provide SFTP (Secure File Transfer Protocol) for all file transfers (inbound or outbound).
10. Provide an annual review period for the Department of Finance to assess all print source documents for changes and updates.
11. Provide a continuously secured and supervised environment for both printing and mailing.
12. Provide a disaster recovery plan, including off-site facilities that would be utilized in the event of a disaster for both printing and mailing.
13. Have a quality control program in place.

B. Printing Services

The Successful Offeror shall provide the following minimum print service requirements:

1. Provide printing services for the County’s bi-annual tax bills, assessment notices, past due notifications, supplemental billings and other associated mailings for the Department of Finance, and other departments as deemed appropriate by the County. Each billing or printing job should be independent as formatting varies. A schedule of existing print jobs is included in **Attachment G**.
2. Specify the printing services offered and the location(s) where printing services will occur. Identify the backup location and provide evidence of a contingency plan.
3. Data shall be provided back to the County as standard web quality .pdf bill images in a compressed .zip file and be available for the County to retrieve via sftp protocol. Additionally, a manifest or index .csv file containing all the individual .pdf file names must be provided at the same time outside of the .zip file.
4. Accept electronic print files from the County, which may be in .txt file format only, unless otherwise agreed to by the County. Files will be transferred to selected vendor via SFTP protocols as well.
5. Electronic data transmissions must comply with industry standards to protect and secure the data transmission and to County specifications.
6. Provide certificate of security for data processed and data stored, including physical access, control access, encrypted storage and encryption during data transmission of electronic files.

7. Provide real time file transmission status notifications of failed and successful file transmissions.
8. Provide the County with a 10% sample size (not to exceed 1,000 bills) per image file prior to giving approval for printing and mailing.
9. After receipt of approval by the County following a review of bill images, the Successful Offeror shall print bills, notifications and other mailings within required timelines as identified on **Attachment G**, unless another date is agreed upon by the County. This also includes the ability to mail a billing over multiple days if requested by the County.
10. Provide quality control inspection of all printing to ensure there are no damaged forms, overwriting, or issues with the printing ink including fading, smudges, spots, at a minimum. Reprinting due to poor quality will be reprinted by the Successful Offeror at no cost to the County and must be mailed the same day or as agreed to by the County.
11. Shall have the ability to print Optical Character Recognition (OCR) barcode or other indicator on bills to segregate by account where single page and multiple bills are intermingled.
12. Shall print scan line and/or Intelligent Mail Barcodes (IMBs) or industry's best practice to ensure an efficient rendering process.
13. Provide ink colors as requested by the County. The County currently prints in color according to the type of bill.
14. Shall provide appropriate weight, color, size and type of paper required by the County for each job, including perforated paper and self- sealing mailers.
15. Be capable of printing supplemental messages, codes, and other information on the bills, notices, and envelopes at the request of the County.
16. Provide sample print documents of Personal Property and Real Estate bills, notices, and other mailings for County approval prior to actual printing and submission for mailing.
17. Capability to suppress the printing of bills based on defined business rules or on ad-hoc basis at the County's request. An example of this would be if the County determines a customer should not be sent a tax bill below a dollar threshold and was not removed from the print file.
18. Be capable of creating, printing and/or receiving inserts or other notices to be included with regular mailings. Inserts could include notifications of payment options changes.
19. Configure the customer remittance stub to work with the remittance processing equipment and software used to process incoming lockbox payments. The current lockbox provider is Wells Fargo.
20. Provide County staff access to track printing progress electronically.

21. Provide a method by which County staff can request specific bills be pulled from the printing process (for cases where a bill should not actually go out) within a mutually agreeable time frame.
22. Distinguish bill images identified as E-Bill Only and images that will be printed and mailed and batched accordingly.
23. Provide a customizable manifest file (.txt/.csv format) that contains the following **(Attachment G)**:
 - a. File name of each .pdf contained in the .zip folder
 - b. Amount Due associated with the .pdf filename
 - c. Due date associated with the .pdf file name
 - d. Account number associated with each .pdf file name

For all approved mailings, .pdf images following a specific naming convention should be compressed into a .zip file following a specific naming convention and a .csv manifest file of all .pdf image files contained in the .zip file and reference section E 6 and E 7 below

24. Provide a method by which the County can make content changes to the front or back of bills and notices (sometime in a moment's notice) in accordance with executive or legislative changes or requests. This includes conditional messages on bills based on data provided in the print file.

C. Mailing Services

The Successful Offeror shall provide the following minimum mailing service requirements.

1. Provide mailing services to include inserting, sealing, metering and mailing County bills, past due notifications and supplemental billings, annual Assessment Notices, and or other associated mailings for the Departments of Finance and other departments as deemed appropriate by the County.
2. Identify and use the lowest cost postage alternative for each item mailed based upon size, weight, zip code, etc.
3. Postage will be paid for the County on a job-by-job basis unless the Successful Offeror proposes differently.
4. Use certified postal software to qualify mail at the lowest rate including, but not limited to, pre-sort using zip+4 address assignment and provide enhanced address labeling and IMB barcodes to obtain the lowest possible postage rate. Henrico billings are mailed via USPS First Class.
5. Must have a process to verify, standardize, and notify the County (in an electronic method) of addresses needing to be updated and correct the addresses submitted by the County to include the following:
 - a. Coding Accuracy Support System (CASS) certified address standardization
 - b. Presort Accuracy Validation & Evaluation (PAVE) for address hygiene
 - c. National Change of Address (NCOA) processing
 - d. Any additional address scrubbing, proofing and corrections
6. Mail bills and notices within the required timelines identified on **Attachment G**.

7. Meet or exceed postal standards for processing mail pieces, included but not limited to NCOA listing.
8. Produce and deliver mail within 24 hours of printing to the United States Postal Service (USPS).
9. Use USPS full-service Intelligent Mail Barcode (IMB) and Seamless Acceptance.
10. Provide proof of delivery to the USPS as requested.
11. Provide a method by which County staff can request specific bills be pulled from the mailing process (for cases where a bill should not actually go out) within a mutually agreeable time frame.
12. Provide intelligent inserting.
13. Must mail Personal Property and Real Estate installment tax bills no later than May 5th and November 5th, unless another date or other dates is or are mutually agreed upon by the County and the Successful Offeror. **See Section V.II. Liquidated Damages**
14. Mail bills/notices in batches over multiple days as required by County.
15. Shall fold, stuff and insert documents specific to the mailings.

D. Reporting Services

The Successful Offeror shall provide the following minimum reporting services:

1. Provide accounting and postal reports to include but not limited to comparison of total bill count printed and mailed to electronic file count.
2. Provide reporting options available and the delivery method, such as control logs, status reports, turnaround time, geographical reports, etc.
3. Shall provide an electronic NCOA update report that includes at minimum the customer's name, previous address, and updated address.
4. Shall provide daily production confirmation reports that contain the following details at minimum:
 - a. Number of bills received for processing.
 - b. Number of bills printed.
 - c. Number of suppressions
 - d. Postage presort breakdown including actual rates.
 - e. Inserts used and inserted counts

E. Technical Requirements

The Successful Offeror shall provide the following minimum technical requirements:

1. Provide notifications via email of print files received from the County showing a reconciliation by the Successful Offeror's in-take process.

2. Provide file error handling process for print files received from the County.
3. Have the ability for the Department of Finance to resend a file with the identified error removed the same day for same day processing SLA's
4. Create single page, multi-page bills or other notices from the print file provided by the County.
5. Create document image pdfs for single-page, multi-page bills or other Notices from the print file provided by the County.
6. Each document image pdf shall be given a unique name identifier. The pdf name following the naming convention <<8 digit acctnumber(use leading zeros)_<<YYYYMONDD (date generated)batchnumber>>. Example: 00001350_20191029070359
7. Each related Manifest files detail records for associated image will be comma delimited and contain: Filename,billtype+account number,date generated, defined description field,billing type. Example:

00001350_20191029070359.pdf,00900001350,20191029,2019 2 RE TAX BILL,RER
8. Indicate if there are any file size limitations or requirements to split files if County requires mailing to be spread over multiple days.

F. Invoicing

The County will not pay any surcharges if requested by the Successful Offeror.

III. COUNTY RESPONSIBILITIES

The County will designate an individual to act as the County's representative with respect to the work to be performed under this contract. Such individual shall have the authority to transmit instructions, receive information, and interpret and define the County's policies and decisions with respect to the contract.

IV. ANTICIPATED PROCUREMENT SCHEDULE

The following represents the timeline of the process currently anticipated by the County:

Request for Proposal Distributed	June 7, 2023
Questions Due	June 20, 2023; noon
Receive Written Proposals	July 12, 2023; 2:00 p.m.
Conduct Oral Interviews with Offerors	TBD
Negotiations Completed	August, 2023
Award Contract	August, 2023
Services Begin	August/September 2023

V. GENERAL CONTRACT TERMS AND CONDITIONS

A. Annual Appropriations

The contract resulting from this procurement ("Contract") shall be subject to annual appropriations by the Henrico County Board of Supervisors. Should the Board fail to appropriate funds for this Contract, the Contract shall be terminated when existing funds are

exhausted. The Successful Offeror (“Successful Offeror” or “Contractor”) shall not be entitled to seek redress from the County or its elected officials, officers, agents, employees, or volunteers should the Board of Supervisors fail to make annual appropriations for the Contract.

B. Award of the Contract

1. The County reserves the right to reject any or all proposals and to waive any informalities.
2. The Successful Offeror must, within fifteen (15) calendar days after Contract documents are presented for signature, execute and deliver to the Purchasing office the Contract documents and any other forms or bonds required by the RFP.
3. The Contract resulting from this RFP is not assignable
4. Notice of award or intent to award may also appear on the Purchasing Office website: <http://henrico.us/finance/divisions/purchasing/>.

C. Collusion

By submitting a proposal in response to this Request for Proposal, each Offeror represents that in the preparation and submission of this proposal, the Offeror did not, either directly or indirectly, enter into any combination or arrangement with any person, Offeror or corporation or enter into any agreement, participate in any collusion, or otherwise take any action in the restraint of free, competitive bidding in violation of the Sherman Act (15 U.S.C. § 1 et seq.) or Section 59.1-9.1 through 59.1-9.17 or Sections 59.1-68.6 through 59.1-68.8 of the Code of Virginia.

D. Compensation

The Successful Offeror must submit a complete itemized invoice for services that are performed under the Contract. The County shall pay the Successful Offeror for satisfactory compliance with the Contract within forty-five (45) days after receipt of a proper invoice.

E. Controlling Law and Venue

The Contract will be made, entered into, and shall be performed in the County and shall be governed by the applicable laws of the Commonwealth of Virginia without regard to its conflicts of law principles. Any dispute arising out of the Contract, its interpretations, or its performance shall be litigated only in the Henrico County General District Court or the Circuit Court of the County of Henrico, Virginia.

F. Termination by County

1. The County may terminate the Contract for cause or for convenience.
2. Termination for Cause
 - a. If the Successful Offeror fails to perform the Contract, in whole or in part, the County shall give the Successful Offeror written notice of the default and the opportunity to cure it by a stated deadline.
 - b. If the Successful Offeror fails to cure its default by the deadline, then the County may terminate the contract, in whole or in part, by providing written notice of termination to the Successful Offeror. The notice of termination shall state the effective date of termination. A partial termination shall set forth the nature and scope of the termination.
 - c. Unless the notice of termination states otherwise, the Successful Offeror shall stop performing the Contract when it receives the notice of termination.

- d. An equitable adjustment in the Contract price shall be made for unpaid services satisfactorily rendered and goods satisfactorily delivered before the date the Successful Offeror receives the notice of termination minus the County's cost to complete the Successful Offeror's work. The Successful Offeror shall not be entitled to payment for services rendered or goods delivered after the date the Successful Offeror receives the notice of termination or for reimbursement of any cost the Successful Offeror incurs after the date the Successful Offeror receives the notice of termination. If the County's cost to complete the Successful Offeror's work exceeds the unpaid balance due to the Successful Offeror, the County will not owe the Successful Offeror any money; instead, the Successful Offeror shall pay to the County the difference between the unpaid balance due and the County's cost to complete the work.
 - e. Unless the parties expressly agree in writing otherwise, the County may transmit notices of default and termination for cause by email, USPS First-Class Mail®, or courier or overnight delivery service. The Successful Offeror shall be deemed to be in receipt of any notice emailed on the day the County sends it. The Successful Offeror shall be deemed to be in receipt of any notice the County sends by USPS First-Class Mail® three business days after the date shown in the postmark. The Successful Offeror shall be deemed to be in receipt of any notice the County sends by courier or overnight delivery service on the date of delivery as confirmed by the courier or overnight delivery service.
 - f. If the Successful Offeror receives two notices of default, the County shall not be obligated to give the Successful Offeror the opportunity to cure any subsequent defaults but may terminate the contract in accordance with this section.
 - g. If it is determined that the Successful Offeror knowingly made a false certification in violation of the Responsible Offeror Certification section of this RFP, the County may terminate the contract for cause. In terminating the contract for this cause, the County shall not be obligated to give the Successful Offeror the opportunity to cure.
 - h. If any act or omission of the Successful Offeror (including the Successful Offeror's employees, agents, subcontractors, and assigns) arising out of the performance of the contract causes any person to suffer bodily injury that involves substantial risk of death, extreme physical pain, protracted and obvious disfigurement, or protracted loss or impairment of the function of a bodily member, organ, or mental faculty, then the County shall not be obligated to give the Successful Offeror the opportunity to cure its default but may terminate the contract in accordance with this section.
 - i. Any remedies this section affords to the County are non-exclusive, and the County may enforce any remedy available at law or in equity in connection with any default of the Successful Offeror. Termination of the Contract for cause does not relieve the Successful Offeror of liability for damages the County sustains because of the Successful Offeror's breach.
3. Termination for Convenience
- a. The County may terminate the Contract, in whole or in part, whenever the Purchasing Director determines that such termination is in the County's best interest.
 - b. The County must give the Successful Offeror written notice of a termination for convenience. The notice must specify the extent to which the Contract is terminated and the effective termination date. The effective termination date shall be at least seven calendar days after the date the County issues the notice of termination for convenience.

- c. An equitable adjustment in the Contract price shall be made for unpaid services satisfactorily rendered and goods satisfactorily delivered before the date the Successful Offeror receives the notice of termination. The Successful Offeror shall not be entitled to payment for services rendered or goods delivered after the date the Successful Offeror receives the notice of termination, and the Successful Offeror shall not be entitled to payment for any costs it incurs after the date it receives the notice of termination.
- d. Unless the County's notice specifies otherwise, the Successful Offeror must stop work on the date it receives the notice of termination.
- e. Unless the parties expressly agree otherwise, the County may transmit notices of termination for convenience by email, USPS First-Class Mail®, or courier or overnight delivery service. The Successful Offeror shall be deemed to be in receipt of any notice emailed on the day the County sends it. The Successful Offeror shall be deemed to be in receipt of any notice sent by USPS First-Class Mail® three business days after the date shown in the postmark. The Successful Offeror shall be deemed to be in receipt of any notice the County sends by courier or overnight delivery service on the date of delivery as confirmed by the courier or overnight delivery service.

G. Drug-Free Workplace to be Maintained by the Contractor (VA. Code §2.2-4312)

- 1. During the performance of this Contract, the Contractor agrees to (i) provide a drug-free workplace for the Contractor's employees; (ii) post in conspicuous places, available to employees and applicants for employment, a statement notifying employees that the unlawful manufacture, sale, distribution, dispensation, possession, or use of a controlled substance or marijuana is prohibited in the Contractor's workplace and specifying the actions that will be taken against employees for violations of such prohibition; (iii) state in all solicitations or advertisements for employees placed by or on behalf of the Contractor that the Contractor maintains a drug-free workplace; and (iv) include the provisions of the foregoing clauses in every subcontract or purchase order of over \$10,000, so that the provisions will be binding upon each subcontractor or vendor.
- 2. For the purposes of this section, "*drug-free workplace*" means a site for the performance of work done in connection with a specific contract awarded to a contractor in accordance with the Virginia Public Procurement Act, the employees of whom are prohibited from engaging in the unlawful manufacture, sale, distribution, dispensation, possession or use of any controlled substance or marijuana during the performance of the contract.

H. Employment Discrimination by Contractor Prohibited

- 1. Contractor certifies to the County of Henrico, Virginia that it will conform to the provisions of the Federal Civil Rights Act of 1964, as amended, as well as the Virginia Fair Employment Contracting Act of 1975, as amended, where applicable, the Virginians With Disabilities Act, the Americans With Disabilities Act and § 2.2-4311 of the Virginia Public Procurement Act. If the award is made to a faith-based organization, the organization shall not discriminate against any recipient of goods, services, or disbursements made pursuant to the contract on the basis of the recipient's religion, religious belief, refusal to participate in a religious practice, or on the basis of race, age, color, gender or national origin and shall be subject to the same rules as other organizations that contract with public bodies to account for the use of the funds provided; however, if the faith-based organization segregates public funds into separate

accounts, only the accounts and programs funded with public funds shall be subject to audit by the public body. (Code of Virginia, § 2.2-4343.1E). During the performance of this Contract, the Contractor agrees as follows (Va. Code § 2.2-4311):

- a) The Contractor will not discriminate against any employee or applicant for employment because of race, religion, color, sex, national origin, age, disability, or other basis prohibited by state law relating to discrimination in employment, except where there is a bona fide occupational qualification reasonably necessary to the normal operation of the Contractor. The Contractor agrees to post in conspicuous places, available to employees and applicants for employment, notices setting forth the provisions of this nondiscrimination clause.
 - b) The Contractor, in all solicitations or advertisements for employees placed by or on behalf of the Contractor, will state that such Contractor is an equal opportunity employer.
 - c) Notices, advertisements and solicitations placed in accordance with federal law, rule or regulation shall be deemed sufficient for the purpose of meeting the requirements of this section.
2. The Contractor will include the provisions of the foregoing subparagraphs (a), (b), and (c) in every subcontract or purchase order of over \$10,000, so that the provisions will be binding upon each subcontractor or vendor.

I. Employment of Unauthorized Aliens Prohibited

As required by Virginia Code §2.2-4311.1, the Contractor does not, and shall not during the performance of this agreement, in the County of Henrico, Virginia knowingly employ an unauthorized alien as defined in the Federal Immigration Reform and Control Act of 1986.

J. Ethics in Public Contracting

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

K. Antitrust

By entering into a contract, the Successful Offeror conveys, sells, assigns, and transfers to the County of Henrico, Virginia all rights, title and interest in and to all causes of action it may now have or hereafter acquire under the antitrust laws of the United States and the Commonwealth of Virginia, relating to the particular services purchased or acquired by the County under the contract.

L. Testing and Inspection

The County reserves the right to conduct any test/inspection it may deem advisable to assure services conform to the specifications.

M. Assignment of Contract

A contract shall not be assignable by the Successful Offeror in whole or in part without the written consent of the County

N. Indemnification

The Successful Offeror agrees to indemnify, defend, and hold harmless the County (including Henrico County Public Schools), and the County's officers, agents, and employees ("Indemnified Parties") from any damages, liabilities, and costs, including attorneys' fees, arising from any claims, demands, actions, or proceedings made or brought against one or more of the Indemnified Parties by any person, including any employee of the Successful Offeror, related to the provision of any services, the failure to provide any services, or the use of any services or materials furnished (or made available) by the Successful Offeror, provided that such liability is not attributable to the sole negligence of the County.

O. Insurance Requirements

The Successful Offeror shall maintain insurance to protect itself and the County and the County's elected officials, officers, agents, volunteers and employees from claims under the Workers' Compensation Act, and from any other claim for damages for personal injury, including death, and for damages to property which may arise from the provision of services under the Contract, whether such services are provided by the Successful Offeror or by any subcontractor or anyone directly employed by either of them. Such insurance shall conform to the Insurance Specifications. (**Attachment E**).

P. No Discrimination against Faith-Based Organizations

The County does not discriminate against faith-based organizations as that term is defined in Va. Code § 2.2-4343.1.

Q. Offeror's Performance

1. The Successful Offeror agrees and covenants that its agents and employees shall comply with all County, state and federal laws, rules and regulations applicable to the business to be conducted under the Contract.
2. The Successful Offeror shall ensure that its employees shall observe and exercise all necessary caution and discretion so as to avoid injury to person or damage to property of any and all kinds.
3. The Successful Offeror shall cooperate with County officials in performing the Contract work so that interference with the County's normal operations will be minimized.
4. The Successful Offeror shall be an independent contractor and shall not be an employee of the County.

R. Ownership of Deliverable and Related Products

1. The County shall have all rights, title, and interest in or to all specified or unspecified interim and final products, work plans, project reports and/or presentations, data, documentation, computer programs and/or applications, and documentation developed or generated during the completion of this project, including, without limitation, unlimited rights to use, duplicate, modify, or disclose any part thereof, in any manner and for any purpose, and the right to permit or prohibit any other person, including the Successful Offeror, from doing so. To the extent that the Successful Offeror may be deemed at any

time to have any of the foregoing rights, the Successful Offeror agrees to irrevocably assign and does hereby irrevocably assign such rights to the County.

2. The Successful Offeror is expressly prohibited from receiving additional payments or profit from the items referred to in this paragraph, other than that which is provided for in the general terms and conditions of the Contract.
3. This shall not preclude Offerors from submitting proposals, which may include innovative ownership approaches, in the best interest of the County.

S. Record Retention and Audits

1. The Successful Offeror shall retain, during the performance of the Contract and for a period of five years from the completion of the Contract, all records pertaining to the Successful Offeror's proposal and any Contract awarded pursuant to this Request for Proposal. Such records shall include but not be limited to all paid vouchers including those for out-of-pocket expenses; other reimbursement supported by invoices, including the Successful Offeror's copies of periodic estimates for partial payment; ledgers, cancelled checks; deposit slips; bank statements; journals; Contract amendments and change orders; insurance documents; payroll documents; timesheets; memoranda; and correspondence. Such records shall be available to the County on demand and without advance notice during the Successful Offeror's normal working hours.
2. County personnel may perform in-progress and post-audits of the Successful Offeror's records as a result of a Contract awarded pursuant to this Request for Proposals. Files would be available on demand and without notice during normal working hours.

T. Severability

Each paragraph and provision of the Contract is severable from the entire agreement and if any provision is declared invalid the remaining provisions shall nevertheless remain in effect.

U. Minority-, Woman-, Service Disabled Veteran-Owned, Small Businesses and Employment Services Organizations

It is the policy of the County to actively seek out and provide contracting opportunities to minority-, woman-, service disabled veteran-owned, small businesses and employment services organizations in procurement transactions made by the County.

The County strongly encourages all suppliers to respond to Invitations for Bids and Request for Proposals and supports the use of minority, woman-, service disabled veteran-owned, small businesses and employment services organizations for sub-contracting opportunities.

All formal solicitations are posted on the Commonwealth of Virginia eVA and the County's internet site at <http://henrico.us/finance/divisions/purchasing/> and may be viewed under the Bids and Proposals link. Construction related solicitations are located on eVA and County internet sites and on ProcureWare at <https://henrico.procureware.com/home>.

V. Subcontracts

No portion of the work shall be subcontracted without prior written consent of the County. In the event that the Successful Offeror desires to subcontract some part of the work specified in the contract, the Successful Offeror shall furnish the County the names, qualifications, and experience of the proposed subcontractors. The Successful Offeror shall, however, remain fully

liable and responsible for the work to be done by his/her subcontractor(s) and shall assure compliance with all the requirements of the Contract.

W. Taxes

1. The Successful Offeror shall pay all County, state, and federal taxes required by law and resulting from the work or traceable thereto, under whatever name levied. Such taxes shall not be in addition to the Contract price between the County and the Successful Offeror because the taxes shall be solely an obligation of the Successful Offeror and not the County, the County shall be held harmless for same by the Successful Offeror.
2. The County is exempt from the payment of federal excise taxes and the payment of state sales and use tax on all tangible, personal property for its use or consumption. Tax exemption certificates will be furnished upon request.

X. Reserved

Y. County License Requirement

If a business is located in the County, it is unlawful to conduct or engage in the business without obtaining a business license. If your business is located in the County, include a copy of your current business license with your proposal submission. If your business is not located in the County, include a copy of your current business license with your proposal submission. If you have any questions, contact the Business Section, Department of Finance, County of Henrico, telephone (804) 501-4310.

Z. Environmental Management

The Successful Offeror must comply with all applicable federal, state, and local environmental regulations. The Successful Offeror is required to abide by the County's Environmental Policy Statement: http://henrico.us/pdfs/risk/env_policy.pdf which emphasizes environmental compliance, pollution prevention, continual improvement, and conservation. Employees of the Successful Offeror must be properly trained and have any necessary certifications to carry out environmental responsibilities. The Successful Offeror must immediately communicate any environmental concerns or incidents to the assigned County Project Manager and the County Risk Manager.

AA. Safety

1. The Successful Offeror shall comply with and ensure that the Successful Offeror's personnel comply with all current applicable local, state and federal policies, regulations and standards relating to safety and health, including, by way of illustration and not limitation, the standards of the Virginia Occupational Safety and Health Administration for the industry. The provisions of all rules and regulations governing safety as adopted by the Safety and Health Codes Board of the Commonwealth of Virginia and issued by the Department of Labor and Industry under Title 40.1 of the Code of Virginia shall apply to all work under the Contract. The Successful Offeror shall provide or cause to be provided all technical expertise, qualified personnel, equipment, tools and material to safely accomplish the work specified and performed by the Successful Offeror.
2. Each job site must have a supervisor who is competent, qualified, or authorized on the worksite, who is familiar with policies, regulations and standards applicable to

the work being performed. The supervisor must be capable of identifying existing and predictable hazards in the surroundings or working conditions which are hazardous or dangerous to employees or the public, and is capable of ensuring that applicable safety regulations are complied with, and shall have the authority and responsibility to take prompt corrective measures, which may include removal of the Successful Offeror's personnel from the work site.

3. In the event the County determines any operations of the Successful Offeror to be hazardous, the Successful Offeror must immediately discontinue such operations upon receipt of either written or oral notice by the County to discontinue such practice.

BB. Authorization to Transact Business in the Commonwealth

1. A contractor organized as a stock or nonstock corporation, limited liability company, business trust, or limited partnership or registered as a registered limited liability partnership or other business form must be authorized to transact business in the Commonwealth as a domestic or foreign business entity if so required by Title 13.1 or Title 50 of the Code of Virginia or as otherwise required by law.
2. An Offeror organized or authorized to transact business in the Commonwealth pursuant to Title 13.1 or Title 50 of the Code of Virginia must include in its proposal the identification number issued to it by the State Corporation Commission (Attachment C). Any Offeror that is not required to be authorized to transact business in the Commonwealth as a foreign business entity under Title 13.1 or Title 50 of the Code of Virginia or as otherwise required by law must include in its proposal a statement describing why the Offeror is not required to be so authorized.
3. An Offeror described in subsection 2 that fails to provide the required information shall not receive an award unless a written waiver is granted by the Purchasing Director, his designee, or the County Manager.
4. Any falsification or misrepresentation contained in the statement submitted by the Offeror pursuant to Title 13.1 or Title 50 of the Code of Virginia may be cause for debarment by the County.
5. Any business entity described in subsection 1 that enters into a contract with a public body must not allow its existence to lapse or allow its certificate of authority or registration to transact business in the Commonwealth if so required by Title 13.1 or Title 50 of the Code of Virginia to be revoked or cancelled at any time during the term of the contract.

CC. Payment Clauses Required by Va. Code §2.2-4354

Pursuant to Virginia Code § 2.2-4354:

1. The Successful Offeror shall take one of the two following actions within seven days after receipt of amounts paid to the Successful Offeror by the County for all or portions of the goods and/or services provided by a subcontractor: (a) pay the subcontractor for the proportionate share of the total payment received from the County attributable to the work performed by the subcontractor under that contract; or (b) notify the County and subcontractor, in writing, of the Successful Offeror's intention to withhold all or a part of the subcontractor's payment with the reason for nonpayment.

2. The Successful Offeror that is a proprietor, partnership, or corporation shall provide its federal employer identification number to the County. Pursuant to Virginia Code § 2.2-4354, the Successful Offeror who is an individual contractor shall provide his/her social security numbers to the County.
3. The Successful Offeror shall pay interest to its subcontractors on all amounts owed by the Successful Offeror that remain unpaid after seven days following receipt by the Successful Offeror of payment from the County for all or portions of goods and/or services performed by the subcontractors, except for amounts withheld as allowed in Subparagraph 1. above.
4. Unless otherwise provided under the terms of the Contract interest shall accrue at the rate of one percent per month.
5. The Successful Offeror shall include in each of its subcontracts a provision requiring each subcontractor to include or otherwise be subject to the same payment and interest requirements with respect to each lower-tier subcontractor.
6. The Successful Offeror's obligation to pay an interest charge to a subcontractor pursuant to the payment clause in Virginia Code § 2.2-4354 shall not be construed to be an obligation of the County. A Contract modification shall not be made for the purpose of providing reimbursement for the interest charge. A cost reimbursement claim shall not include any amount for reimbursement for the interest charge.

DD. Contract Period

1. The contract period shall be for a two-year period starting from execution of contract. Contract prices shall remain firm for the contract period.
2. The contract may be renewed for four (4) additional one-year periods upon the sole discretion of the County at a price not to exceed 3% above the previous year's prices unless written approval is given by the Purchasing Director.
3. The Successful Offeror shall give at least a 90 days' written notice to the County for any price increases and/or if it does not intend to renew the contract at any annual renewal.
4. The contract shall not exceed a maximum of six (6) years.

EE. Non-Exclusive Contract

Nothing in this Request for Proposal constitutes an offer or promise to purchase any goods or services exclusively from the Successful Offeror. The County reserves the right to purchase goods and services similar to, or the same as, the goods and services that are subject to this Request for Proposal from other sources.

FF. Occupational Safety & Health Policy Statement

The Successful Offeror must comply with all applicable federal, state, and local occupational safety and health standards. The Successful Offeror is required to abide by the County's Occupational Safety & Health Policy Statement: https://henrico.us/pdfs/risk/h_safety_policy.pdf which emphasizes maintaining a safe and healthy work environment for all employees, volunteers, and contractors who access County property and locations. The Successful Offeror must be properly trained and have any necessary certifications to carry out occupational safety and health policy responsibilities. The Successful Offeror must immediately communicate any concerns or incidents to the assigned County Project Manager and the County Risk Manager.

GG. Cooperative Procurement

This procurement is being conducted by the County in accordance with the provisions of Section 2.2-4304 of the Code of Virginia. Except for contracts for architectural and engineering services, if agreed to by the contractor, other public bodies may utilize this Contract. The Contractor shall deal directly with any public body it authorizes to use the Contract. The County, its officials, and its employees are not responsible for placement of orders, invoicing, payments, contractual disputes, or any other transactions between the Contractor and any other public body, and in no event shall the County, its officials, or its employees be responsible for any costs, damages or injury resulting to any party from another public body's cooperative use of a County contract. The County assumes no responsibility for any notification of the availability of the Contract for use by other public bodies, but the Contractor may conduct such notification.

HH. Liquidated Damages

It is understood and agreed that time is of the essence in mailing Personal Property and Real Estate installment tax bills. Successful Offeror must mail all Personal Property and Real Estate Tax (1st Half) bills on or before May 5. Successful Offeror shall pay to the County the sum of \$100 per day for each day during which any Personal Property and Real Estate Tax (1st Half) bills remain unsent after May 5. Successful Offeror must mail all Personal Property and Real Estate Tax (2nd Half) bills on or before November 5. Successful Offeror shall pay to the County the sum of \$100 per day for each day during which any Personal Property and Real Estate Tax (2nd Half) bills remain unsent after November 5. All sums so payable because of Successful Offeror's failure to mail the bills by the stated deadlines shall be recoverable as liquidated damages or may be deducted by the County from any moneys due or becoming due to the Successful Offeror, and no such payment shall be waived except in writing by the County. If the County consents in writing to mailing deadlines other than May 5 or November 5 and if Successful Offeror fails to meet those mailing deadlines, this liquidated damages provision shall apply with equal force, with the agreed upon dates substituted for May 5 and November 5, as applicable. If the County is primarily responsible for Successful Offeror's failure to meet a mailing deadline, this liquidated damages provision shall not apply. If Successful Offeror's failure to meet a mailing deadline is not caused by Successful Offeror's negligence or intentional act, this liquidated damages provision shall not apply.

VI. PROPOSAL SUBMISSION REQUIREMENTS

- A. The Purchasing Division will not accept oral proposals, nor proposals received by telephone, FAX machine, email or hard copy submissions. Proposals will only be accepted through eVA.
- B. All erasures, interpolations, and other changes in the proposal shall be signed or initialed by the Offeror.
- C. The Proposal Signature Sheet (**Attachment A**) must accompany any proposal(s) submitted and be signed by an authorized representative of the Offeror. If the Offeror is a firm or corporation, the Offeror must print the name and title of the individual executing the proposal. All information requested should be submitted. Failure to submit all information

requested may result in the Purchasing Division requiring prompt submission of missing information and/or giving a lowered evaluation of the proposal.

- D. Reserved.
- E. The time proposals are received shall be determined by the time clock in eVA. Offerors are responsible for ensuring that their proposals are submitted in eVA by the deadline indicated.
- F. By submitting a proposal in response to this Request for Proposal, the Offeror represents it has read and understands the Scope of Services and has familiarized itself with all federal, state, and local laws, ordinances, and rules and regulations that in any manner may affect the cost, progress, or performance of the Contract work.
- G. The failure or omission of any Offeror to receive or examine any form, instrument, addendum, or other documents or to acquaint itself with conditions existing at the site, shall in no way relieve any Offeror from any obligations with respect to its proposal or to the Contract.
- H. Subject to the limitations of Va. Code § 2.2-4342(F), trade secrets or proprietary information submitted by an Offeror in connection with this procurement transaction shall not be subject to public disclosure under the Virginia Freedom of Information Act; however, the Offeror must invoke the protection of this section prior to or upon submission of data or materials, and must identify the data or other materials to be protected and state the reasons why protection is necessary (Va. Code § 2.2-4342(F)). **(Attachment D)**
- I. A proposal may be modified or withdrawn by the Offeror any time prior to the time and date set for the receipt of proposals. The Offeror shall follow the process in eVA. No proposal can be withdrawn after the time set for the receipt of proposals and for one-hundred twenty (120) days thereafter.
- J. The County welcomes comments regarding how the proposal documents and scope of services may be improved. **Offerors requesting clarification, interpretation of, or improvements to the Request for Proposal's general terms, conditions, and scope of services shall submit technical questions concerning the Request for Proposal no later than noon on June 20, 2023 in writing.** Any changes to this Request for Proposals shall be in the form of a written addendum issued by the Purchasing Division and it shall be signed by the Purchasing Director or a duly authorized representative. **Each Offeror is responsible for determining that it has received all addenda issued by the Purchasing Division before submitting a proposal. If an addendum is issued after an offeror has submitted a proposal response, the Offeror shall resubmit their proposal in the latest solicitation round in eVA. The County will only evaluate proposals submitted in the latest solicitation round in eVA.**
- K. All proposals received on time shall be accepted for consideration. Proposals shall be open to public inspection only after award of the Contract.

L. Responsible Offeror Certification

1. “Responsible offeror” means a person who has the capability, in all respects, to perform fully the contract requirements and the moral and business integrity and reliability that will assure good faith performance, and who has been prequalified, if required.
2. In determining whether an Offeror is responsible, the County will consider whether the Offeror has defaulted on any government contract in the last five years; whether any government has terminated a contract with the Offeror for cause in the last five years; and whether Offeror or any of its officers, directors, partners, or owners is currently barred from participating in any procurements by any federal, state, or local government agency.
3. As part of its proposal, Offeror must certify that it has not defaulted on any government contract in the last five years or must explain any such default in reasonable detail. The County may deem any such explanation of default insufficient if it does not include contact information for the government on whose contract Offeror defaulted.
4. As part of its submission, Offeror must certify that no government has terminated a contract with the Offeror for cause in the last five years or must explain any such termination for cause in reasonable detail. The County may deem any such explanation of termination for cause insufficient if it does not include contact information for the government that terminated a contract with the Offeror for cause.
5. As part of its submission, Offeror must certify that neither it nor any of its officers, directors, partners, or owners is currently barred from participating in any procurements by any federal, state, or local government body. If Offeror cannot make such certification, Offeror must explain any ban in reasonable detail. The County may deem any such explanation insufficient if it does not include contact information for the public body that barred Offeror or Offeror’s officer, director, partner, or owner from participating in any procurement on any federal, state, or local government body’s contract.
6. If the Offeror fails to submit certifications or explanations in accordance with this section, the Purchasing Division may require prompt submission of missing information and/or give a lowered evaluation of the proposal.
7. The Offeror must notify the County immediately if the Offeror discovers that its certification was erroneous when submitted or has become erroneous.
8. The fact that an Offeror defaulted on a government contract in the last five years; the fact that a government terminated a contract with the Offeror for cause in the past five years; or the fact that Offeror or any of its officers, directors, partners, or owners has been barred from bidding on contracts by any federal, state, or local government body will not necessarily result in the County deeming the Offeror nonresponsible.
9. If it is later determined that the Successful Offeror knowingly made a false certification, the County may terminate the contract for cause.

VII. PROPOSAL RESPONSE FORMAT

- A. Offerors shall submit a written proposal that present the Offeror’s qualifications and understanding of the work to be performed. Offerors must address each evaluation criterion and be specific in presenting their qualifications. The proposal should provide all the information considered pertinent to the Offeror’s qualifications for this project.

B. The Offeror should include in its proposal the following:

1. Table of Contents

All pages are to be numbered.

2. Tab 1 – Introduction and Signed Forms

In this tab, the following items should be provided:

- a. Cover Letter – On company letterhead, signed by a person with the corporate authority to enter into contracts in the amount of the proposal.
- b. Proposal Signature Sheet – **Attachment A**
- c. Business Classification Form – **Attachment B**
- d. Virginia State Corporation Commission Registration Information – **Attachment C**
- e. Proprietary/Confidential Information – **Attachment D**

3. Tab 2 – Statement of the Scope

In this tab, Offerors, in concise terms, shall state their understanding of the Scope of Services requested by this RFP in Section II.

4. Tab 3 – Default, Termination and Barred Certification Statement

Pursuant to Section VI, Items L(3), L(4) and L(5), in this tab, Offerors shall certify (i) that it has not defaulted on any government contract in the last five years, (ii) that no government has terminated a contract with the Offeror for cause in the last five years, and (iii) that neither it nor any of its officers, directors, partners, or owners is currently barred from participating in any procurements by any federal, state, or local government body. If any of the aforementioned certifications cannot be made, Offerors must explain in reasonable detail.

5. Tab 4 – **Offeror’s Qualifications, Experience, and Financial Capacity**

In this tab, Offerors shall demonstrate the Offeror’s and their staff’s qualifications and experience in providing the services as requested in this Request for Proposal (“RFP”).

This shall include resumes of staff that would be providing services for this contract.

Offerors’s shall include, at a minimum, the following information with their submission:

- a. Number of years of printing and mailing processing experience.
- b. Years of providing printing and mailing processing services under any other name.
- c. Average number of years’ experience of supervisor and supporting staff
- d. Number of current printing and mailing customers.
- e. Average monthly and annual volume of printing and mailing transactions.
- f. References from at least three (3) project/contracts completed within the last five years that are similar in nature and/or size to the County to which their firm has provided services as outlined in the scope of services. This list shall include contact person’s name, telephone number and email address. Offerors may not use Henrico County as one of their references.
- g. Identify key measures of your firm’s financial strength. Include copies of most recent audited financial statements and subsequent un-audited quarterly financial statements.

6. **Tab 5 – Service Approach, Implementation and Training**

In this tab, Offerors shall demonstrate in detail their approach to fulfilling the scope of services being solicited in this RFP and demonstrate their compliance with the requirements of the Scope of Services. Offers shall provide, at a minimum, the following information:

- a. Hours of operation
- b. Holidays observed
- c. Availability of staff capable of resolving inquiries
- d. Toll free phone numbers and email access availability
- e. Provide any documents the County may be required to sign such as License Agreement or End User Agreements.
- f. Discuss training for Finance staff to include the number of hours, on-site or webinar training, and the number of attendees that can attend.
- g. During the contract term, is training offered for any new staff that may require training. Is there an additional cost?
- h. Provide a detailed implementation schedule indicating tasks, critical tasks and number of days for completion of each.
- i. Indicate tasks that will occur concurrently.
- ii. Show the total number of workdays required to complete the implementation.
- iii. Is an implementation team assigned? Provide information on the individuals that would be assigned.
- iv. Describe the support provided during implementation including training, technical assistance, manuals, on-site visits, etc. Testing must be conducted in a secure test environment.
- v. Describe how your company will transition the County from its current process to meet this proposals Scope of Services.
 - i. What is the length of time images are available?
 - j. Will a report be run to determine USPS issues before going live at no additional cost to the County?
 - k. Does comingling occur during the process?
 - l. What differentiates your printing and mailing processing service with others in the industry?
 - m. Does your firm offer any new services that could more effectively streamline the current services and describe the pros and cons of using this service and quantify any costs savings.

7. **Tab 6 – Technical, Quality Assurance and Security**

In this tab Offerors should describe, in detail, how the proposed solution meets the technical and reporting requirements of the RFP. Offerors shall provide, at a minimum, the following information.

- a. Provide your specific procedures for printing and mailing. Include the methods used to handle printing errors such as misfeeds or damaged documents and insertion of various sizes of documents.
- b. Provide a flowchart of the printing and mailing process and show at what point Quality Assurance occurs.

- c. Describe your quality assurance philosophies and who the dedicated individual for quality assurance will be .
- d. Discuss software used for correct insertion of envelopes and multiple sized inserts.
- e. Indicate if there are any file size limitations or requirements to split files if County requires mailing to be spread over multiple days.
- f. Describe the mailing method your firm will use to obtain the lowest possible postal rate.
- g. Discuss your firm's ability to provide an indicia for Henrico County. If the County indicia is not available, discuss options such as "ghosting indicia" and if there is an additional charge?
- h. How does your firm automate address changes back to the County?
- i. Turn around time anticipated for inquires from County staff.
- j. Equipment including hardware and software that would be used.
- k. Level of technical hardware and software technical support.
- l. Data communications hardware and protocol supported.
- m. Processing deadlines.
- n. Describe your technical assistance team and if one person will be dedicated to our account.
- o. List any procedures, certifications or awards received that demonstrate that adequate security controls are in place to properly store, manage and process government information.
- p. Provide the County with most recent and future audit reports related to these procedures or certifications.
- q. Specify the location(s) where printing services will occur. Identify the backup location and provide evidence of a contingency plan.
- r. Discuss in detail transmission security.
- s. Describe your business continuity plan and/or contingency plan in the event of a disaster, or in the event that the equipment used in the performance of the contract should fail. Include your provisions for processing, hardware, software and communications backup. Provide date of last disaster recovery testing and outcome.
- t. Describe your policies and procedures that ensure access to government information is limited to only those employees/contractors who require access to perform your proposed services.
- u. Identify any third party which would host or have access to County information.
- v. Describe your hiring procedures and safeguards to for screening employees and contractors who have access to County information.
- w. Describe your policies, procedures and practices for the physical security of your data centers and the safeguards that are in place to prevent unauthorized use, reuse, distribution transmission, manipulation, copying, modification access or disclosure of private information.
- x. What controls are in place to detect security breaches? What is the policy of informing the County of any security breach?
- y. How will County information be managed after contract termination? Will County information provided to the Successful Offeror be deleted or destroyed and what time frame at the completion of the contract?

- z. Provide certificate of security for data processed and data stored, including physical access, control access, encrypted storage and encryption during data transmission of electronic files.

8. Tab 7 – Pricing / Cost Proposal

In this tab, Offerors shall provide the following information:

- a. A price list for all pricing required to complete the Scope of Services for this RFP.
- b. For evaluation purposes, using the price list, Offerors shall provide “Total cost per Job” on Tab 1 of Excel spreadsheet along with any additional charges associated with the proposed Solution. Offerors shall then supply “Itemized pricing” per job (1-8) on Tab 2 of the Excel spreadsheet. **Attachment J.**

9. (if needed) Tab 8 – Exceptions

In this tab, Offerors shall list any exceptions taken to the Scope of Services and General Terms and Conditions of this Request for Proposals. The County intends to make the RFP and the Successful Offeror’s proposal a part of the contract between the parties, so Offerors should list any exceptions for purposes of negotiating the contract

10. (if needed) Tab 9 – Assumptions

In this tab, offerors shall list any assumptions made when responding to this Request for Proposals.

11. (if needed) Tab 10 – Appendices

Optional for Offerors who wish to submit additional material that will clarify their response.

VIII. PROPOSAL EVALUATION / SELECTION PROCESS

A. Selection of the Successful Offeror will be based upon submission of proposals meeting the selection criteria. The minimum selection criteria will include:

Evaluation Criteria	Weight
Criterion #1 – Functional and Technical Requirements <i>(In accordance with Section VII, Item (B3) and (B7) this criterion considers the extent to which the Offeror’s proposal satisfies the services requested by this as specified in Sec. II)</i>	30
Criterion 2 – Experience and Qualifications <i>(In accordance with Sec. VII, Item (B4) and (B5) This criterion considers the Offeror’s qualifications, experience, resumes and references of the overall Offeror and staff assigned relative to the services solicited by this RFP as specified in Section II.)</i>	25
Criterion 3 – Service Approach, Implementation Training <i>(In accordance with Section VII, Item (B6),(B9) and (B10) this criterion considers the Offeror’s services approach, implementation and training as requested by this RFP as specified in Section II.)</i>	20
Price <i>(In accordance with Section VII, Item (B8), this criterion considers the Offeror’s pricing for completing the services requested by this RFP as specified in Section II.)</i>	20
Quality of Proposal Submission / Oral Presentations <i>(This criterion considers the overall quality of the Offeror’s proposal submitted and any oral presentations required.)</i>	5
Total	100

B. For goods, nonprofessional services, and insurance, selection shall be made of two or more Offerors deemed to be fully qualified and best suited among those submitting proposals, on the basis of the factors involved in the Request for Proposal, including price if so stated in the Request for Proposal. In the case of a proposal for information technology, as defined in Va. Code § 2.2-2006, the County shall not require an Offeror to state in a proposal any exception to any liability provisions contained in the Request for Proposal. Negotiations shall then be conducted with each of the Offerors so selected. The Offeror shall state any exception to any liability provisions contained in the Request for Proposal in writing at the beginning of negotiations, and such exceptions shall be considered during negotiation. Price shall be considered, but need not be the sole or primary determining factor. After negotiations have been conducted with each Offeror so selected, the County shall select the Offeror which, in its opinion, has made the best proposal and provides the best value, and shall award the contract to that Offeror. Should the County determine in writing and in its sole discretion that only one Offeror is fully qualified, or that one Offeror is clearly more highly qualified than the others under consideration, a contract may be negotiated and awarded to that Offeror.

**ATTACHMENT A
PROPOSAL SIGNATURE SHEET**

My signature certifies that the proposal as submitted complies with all requirements specified in this Request for Proposal (“RFP”) No. 23-2535-5EMF Printing and Mailing Services for the Department of Finance..

My signature also certifies that by submitting a proposal in response to this RFP, the Offeror represents that in the preparation and submission of this proposal, the Offeror did not, either directly or indirectly, enter into any combination or arrangement with any person or business entity, or enter into any agreement, participate in any collusion, or otherwise take any action in the restraining of free, competitive bidding in violation of the Sherman Act (15 U.S.C. Section 1) or Sections 59.1-9.1 through 59.1-9.17 or Sections 59.1-68.6 through 59.1-68.8 of the Code of Virginia.

I hereby certify that I am authorized to sign as a legal representative for the business entity submitting this proposal.

LEGAL NAME OF OFFEROR (DO <u>NOT</u> USE TRADE NAME):
ADDRESS:
FEDERAL ID NO:
SIGNATURE:
NAME OF PERSON SIGNING (PRINT):
TITLE:
TELEPHONE:
FAX:
EMAIL ADDRESS:
DATE:

ATTACHMENT B BUSINESS CATEGORY CLASSIFICATION FORM

Company Legal Name: _____

This form completed by: Signature: _____ Title: _____

Date: _____

PLEASE SPECIFY YOUR **BUSINESS CATEGORY** BY CHECKING THE APPROPRIATE BOX(ES) BELOW.

(Check all that apply.)

- SMALL BUSINESS
- WOMEN-OWNED BUSINESS
- MINORITY-OWNED BUSINESS
- SERVICE-DISABLED VETERAN
- EMPLOYMENT SERVICES ORGANIZATION
- NON-SWaM (Not Small, Women-owned or Minority-owned)

SUPPLIER REGISTRATION – The County of Henrico encourages all suppliers interested in doing business with the County to register with eVA, the Commonwealth of Virginia’s electronic procurement portal, <http://eva.virginia.gov>.

eVA Registered? Yes No

If certified by the Virginia Minority Business Enterprises (DMBE), provide DMBE certification number and expiration date.

_____ NUMBER

_____ DATE

DEFINITIONS

For the purpose of determining the appropriate business category, the following definitions apply:

"Small business" means a business, independently owned and controlled by one or more individuals who are U.S. citizens or legal resident aliens, and together with affiliates, has 250 or fewer employees, or annual gross receipts of \$10 million or less averaged over the previous three years. One or more of the individual owners shall control both the management and daily business operations of the small business.

"Women-owned business" means a business that is at least 51 percent owned by one or more women who are U.S. citizens or legal resident aliens, or in the case of a corporation, partnership, or limited liability company or other entity, at least 51 percent of the equity ownership interest is owned by one or more women who are U.S. citizens or legal resident aliens, and both the management and daily business operations are controlled by one or more women.

"Minority-owned business" means a business that is at least 51 percent owned by one or more minority individuals who are U.S. citizens or legal resident aliens, or in the case of a corporation, partnership, or limited liability company or other entity, at least 51 percent of the equity ownership interest in the corporation, partnership, or limited liability company or other entity is owned by one or more minority individuals who are U.S. citizens or legal resident aliens, and both the management and daily business operations are controlled by one or more minority individuals.

"Minority individual" means an individual who is a citizen of the United States or a legal resident alien and who satisfies one or more of the following definitions:

1. "African American" means a person having origins in any of the original peoples of Africa and who is regarded as such by the community of which this person claims to be a part.
2. "Asian American" means a person having origins in any of the original peoples of the Far East, Southeast Asia, the Indian subcontinent, or the Pacific Islands, including but not limited to Japan, China, Vietnam, Samoa, Laos, Cambodia, Taiwan, Northern Mariana Islands, the Philippines, a U.S. territory of the Pacific, India, Pakistan, Bangladesh, or Sri Lanka and who is regarded as such by the community of which this person claims to be a part.
3. "Hispanic American" means a person having origins in any of the Spanish-speaking peoples of Mexico, South or Central America, or the Caribbean Islands or other Spanish or Portuguese cultures and who is regarded as such by the community of which this person claims to be a part.
4. "Native American" means a person having origins in any of the original peoples of North America and who is regarded as such by the community of which this person claims to be a part or who is recognized by a tribal organization.

"Service disabled veteran business" means a business that is at least 51 percent owned by one or more service disabled veterans or, in the case of a corporation, partnership, or limited liability company or other entity, at least 51 percent of the equity ownership interest in the corporation, partnership, or limited liability company or other entity is owned by one or more individuals who are service disabled veterans and both the management and daily business operations are controlled by one or more individuals who are service disabled veterans.

"Service disabled veteran" means a veteran who (i) served on active duty in the United States military ground, naval, or air service, (ii) was discharged or released under conditions other than dishonorable, and (iii) has a service-connected disability rating fixed by the United States Department of Veterans Affairs.

"Employment services organization" means an organization that provides community-based employment services to individuals with disabilities that is an approved Commission on Accreditation of Rehabilitation Facilities (CARF) accredited vendor of the Department of Aging and Rehabilitative Services.

ATTACHMENT C
Virginia State Corporation Commission (SCC)
Registration Information

The Offeror:

is a corporation or other business entity with the following SCC identification number:
_____ **-OR-**

is not a corporation, limited liability company, limited partnership, registered limited liability partnership, or business trust **-OR-**

is an out-of-state business entity that does not regularly and continuously maintain as part of its ordinary and customary business any employees, agents, offices, facilities, or inventories in Virginia (not counting any employees or agents in Virginia who merely solicit orders that require acceptance outside Virginia before they become contracts, and not counting any incidental presence of the Bidder in Virginia that is needed in order to assemble, maintain, and repair goods in accordance with the contracts by which such goods were sold and shipped into Virginia from Bidder's out-of-state location) **-OR-**

is an out-of-state business entity that is including with this bid/proposal an opinion of legal counsel which accurately and completely discloses the undersigned Bidder's current contracts with Virginia and describes why those contracts do not constitute the transaction of business in Virginia within the meaning of §13.1-757 or other similar provisions in Titles 13.1 or 50 of the Code of Virginia.

Please check the following box if you have not checked any of the foregoing options but currently have pending before the SCC an application for authority to transact business in the Commonwealth of Virginia and wish to be considered for a waiver to allow you to submit the SCC identification number after the due date for bids:

ATTACHMENT D
PROPRIETARY/CONFIDENTIAL INFORMATION IDENTIFICATION

NAME OF OFFEROR: _____

Trade secrets or proprietary information submitted by an Offeror shall not be subject to public disclosure under the Virginia Freedom of Information Act; however, the Offeror must invoke the protections of Va. Code § 2.2-4342(F) in writing, either before or at the time the data or other materials are submitted. The Offeror must specifically identify the data or materials to be protected including the section(s) of the proposal in which it is contained and the pages numbers, and state the reasons why protection is necessary. A summary of trade secrets and proprietary information submitted shall be submitted on this form. The proprietary or trade secret material submitted must be identified by some distinct method such as highlighting or underlining and must indicate only the specific words, figures, or paragraphs that constitute trade secret or proprietary information. Va. Code § 2.2-4342(F) prohibits an Offeror from classifying an entire proposal, any portion of a proposal that does not contain trade secrets or proprietary information, line item prices, or total proposal prices as proprietary or trade secrets. If, after being given reasonable time, the Offeror refuses to withdraw such classification(s), the proposal will be rejected.

SECTION/TITLE	PAGE NUMBER(S)	REASON(S) FOR WITHHOLDING FROM DISCLOSURE

ATTACHMENT E
COUNTY OF HENRICO
INSURANCE SPECIFICATIONS

The following insurance coverages and limits are required in order to provide goods, services, construction, professional and non-professional services to Henrico County general government agencies and Henrico County Public Schools. These requirements are specific to this procurement and may or may not be the same for future requests.

Please be sure and review the Additional Requirements Section

The Successful Bidder/Offeror shall carry Public Liability Insurance in the amount specified below, including contractual liability assumed by the Successful Bidder/Offeror, and shall deliver a Certificate of Insurance from carriers licensed to do business in the Commonwealth of Virginia and that is representative of the insurance policies. The Certificate shall show that the policy has been endorsed to add the County of Henrico and Henrico County Public Schools named as an additional insured for the Commercial General Liability coverage. ***The certificate must not show in the description of operations section that it is issued specific to any bid, job, or contract.*** The coverage shall be provided by a carrier(s) rated not less than “A-” with a financial rating of at least VII by A.M. Best or a rating acceptable to the County. In addition, the Successful Bidder/Offeror shall agree to give the County a minimum of 30 days prior notice of any cancellation or material reduction in coverage.

Workers’ Compensation

Statutory Virginia Limits

Employers’ Liability Insurance - \$100,000 for each Accident by employee
\$100,000 for each Disease by employee
\$500,000 policy limit by Disease

Commercial General Liability

\$1,000,000 each occurrence including contractual liability for specified agreement
\$2,000,000 General Aggregate (other than Products/Completed Operations)
\$2,000,000 General Liability-Products/Completed Operations
\$1,000,000 Personal and Advertising injury
\$ 100,000 Fire Damage Legal Liability

Business Automobile Liability – including owned, non-owned and hired car coverage

Combined Single Limit - \$1,000,000 each accident

Umbrella Liability

\$2,000,000 Per Occurrence and in the aggregate

Additional Requirements

In addition to the requirements above, the Successful Bidder/Offeror shall thoroughly review the scope of work that is included and if any of the following are included in the services that will be provided, the following additional insurance will be required, if required:

- Professional Liability - \$2,000,000 Per Occurrence (or limit in accordance with Statute for Medical Professional)**
Required if the Scope includes providing advice or consultation including but not limited to; lawyers, bankers, physicians, programming, design (including construction design), architects & engineers and others who require extensive education and/or licensing to perform their duties.
- Cyber Liability - \$2,000,000 Per Occurrence**
Required if the Scope includes the collection and electronic transmittal of Personal Health Insurance (PHI), or any other demographic data on individuals including but not limited to Name, Address, Social Security Numbers or any other sort of personally identifying information.
- Abuse and Molestation Coverage - \$1,000,000 Per Occurrence**
Required if the scope of work includes the offering of professional or non-professional services to any child or student where one on one contact or consultation is to be provided.
- Pollution Liability - \$1,000,000 Per Occurrence**
Required if the scope of work involves the use (other than in a motor vehicle) or removal of a substance or energy introduced into the environment that potentially has an undesired effect or affects the usefulness of a resource. These include, but are not limited to Asbestos, PCB's, Lead, Mold, and Fuels.
- Explosion, Collapse & Underground Coverage (XCU)**
Required of a Contractor in limits equal to the General Liability Limit when the Scope includes any operations involving Blasting, any work underground level including but not limited to wires, conduit, pipes, mains, sewers, tanks, tunnels, or any excavation, drilling, or similar work.
- Builders Risk Coverage**
Required if the scope of work includes the ground up construction of a structure. Limit of insurance shall be 100% of the completed value of the structure. For projects for the renovation of an existing structure, The County shall insure the Builder's Risk with the Contractor being responsible for the first \$10,000 of any claim.
- Other as Specified Below**
Professional Liability in the form of Errors & Omissions Coverage

NOTE 1: The commercial general liability insurance shall include contractual liability. The contract documents include an indemnification provision(s). The County makes no representation or warranty as to how the Bidder/Offeror's insurance coverage responds or does not respond. Insurance coverages that are unresponsive to the indemnification provision(s) do not limit the Bidder/Offeror's responsibilities outlined in the contract documents.

NOTE 2: The intent of this insurance specification is to provide the coverage required and the limits expected for each type of coverage. With regard to the Business Automobile Liability and Commercial General Liability, the total amount of coverage can be accomplished through any combination of primary and excess/umbrella insurance. This insurance shall apply as primary insurance and non-contributory with respect to any other insurance or self-insurance programs afforded the County of Henrico and Henrico County Public Schools. This policy shall be endorsed to be primary with respect to the additional insured.

NOTE 3: Title 65.2 of the Code of Virginia requires every employer who regularly employs three or more full-time or part-time employees to purchase and maintain workers' compensation insurance. If you do not purchase a workers' compensation policy, a signed statement is required documenting that you are in compliance with Title 65.2 of the Code of Virginia.

NOTE 4: The Certificate Holder Box shall read as follows:
County of Henrico
Risk Management
PO Box 90775
Henrico, VA 23273



ATTACHMENT F SAMPLE CONTRACT

[Non-Professional *or* Professional] Services Contract Contract No. [#]

This [Non-Professional *or* Professional Services] Contract (this “Contract”) entered into this [#] day of [month] 20[##], by [Offeror’s Name] (the “Contractor”) and the [County of Henrico, Virginia *or* County School Board of Henrico County, Virginia] ([the “County” *or* “HCPS”]).

WHEREAS [the County *or* HCPS] has awarded the Contractor this Contract pursuant to Request for Proposals No. [#], as modified by [list addenda with dates separated by commas] (the “Request for Proposals”), for [subject matter of the RFP].

WITNESSETH that the Contractor and [the County *or* HCPS], in consideration of the mutual covenants, promises and agreements herein contained, agree as follows:

SCOPE OF CONTRACT: The Contractor shall provide the services to the [the County *or* HCPS] as set forth in the Contract Documents.

COMPENSATION: The compensation [the County *or* HCPS] will pay to the Contractor under this Contract shall be [insert information, referenced document, matrix, etc.].

{If contract is an annual contract, utilize Contract Term, if contract is a spot purchase utilize Service Schedule}

CONTRACT TERM: The Contract term shall be for a period of [number] year[s] beginning [date] and ending [date]. [The County *or* HCPS] may renew the Contract for up to [number] [number]-year terms giving 30 days’ written notice before the end of the term unless Contractor has given [the County *or* HCPS] written notice that it does not wish to renew at least 180 days before the end of the term.

{or}

SERVICE SCHEDULE: Services shall be performed in accordance with the [referenced document within the proposal/BAFO].

CONTRACT DOCUMENTS: This Contract hereby incorporates by reference the documents listed below (the “Contract Documents”) which shall control in the following descending order:

1. This [Non-Professional *or* Professional] Services Contract between [the County *or* HCPS] and Contractor.
2. The General Contract Terms and Conditions included in the Request for Proposals.
3. The Negotiated Modifications (Exhibit [letter]).
4. Contractor’s Best and Final Offer dated [date] (Exhibit [letter]).
5. Contractor’s Original Proposal dated [date] (Exhibit [letter]).
6. The Scope of Services included in the Request for Proposals.

IN WITNESS WHEREOF, the parties have caused this Contract to be duly executed intending to be bound hereby.

[Contractor Name]

[Address]

[City, State, Zip]

[County of Henrico, Virginia *or* County School Board of Henrico County, Virginia]

[P.O. Box 90775 *or* 406 Dabbs House Road]

[Henrico, VA 23273-0775 *or* 23223]

Signature

Signature

Printed Name and Title

[Purchasing Director *or* County Manager *or* Superintendent]

Date

Date

ATTACHMENT G
Personal Property Tax, Real Estate Tax, Real Estate Assessment Notices
Annual Mailings and Calendar

Job #	Agency/Bill Type	Number of Mailings per Year	Month(s) of Mailing	No. of Inserts	Avg Count per Mailing	Timeframe to be mailed	Number of pages
FINANCE TREASURY DIVISION							
1	Personal Property Installment Bill	2 per year	April/October	2	233,000	24 hours after printing in batches of 3	multiple
2	Real Estate Installment Bill	2 per year	April/October	2	53,000	24 hours after printing	multiple
3	Personal Property Past Due Bill	2 per year	June/December	1	94,000	24 hours after printing	multiple
4	Real Estate Past Due Bill	2 per year	June/December	1	6,400	24 hours after printing	multiple
5	Vehicle Registration Withholding Notices	2 per year	July/January	1	32,000	24 hours after printing	multiple
6	Personal Property Supplemental Bill	2 per year	August/February	2	13,000	24 hours after printing	multiple
7	Real Estate Collection Action Notices	2 per year	August/February	1	3,000	24 hours after printing	multiple
FINANCE REAL ESTATE DIVISION							
8	Real Estate Assessment Notices	1 per year	February	0	120,000	24 hours after printing	single

ATTACHMENT G – continued
Personal Property & Real Estate Tax Bill Calendar

2023/1 INSTALLMENT

PROCESS	DATE	DAY
Real Estate		
Run File	4/17/23	Monday
Send File to EverView	4/18/23	Tuesday
Finance Review	4/20/23	Thursday
BOS Meeting	4/24/23	Monday
Give Okay to P&M	4/25/23	Tuesday
Mail	4/27/23	Thursday
Personal Property		
Run File	4/18/23	Tuesday
Send File to EverView	4/19/23	Wednesday
Finance Review	4/21/23	Friday
BOS Meeting	4/24/23	Monday
Give Okay to P&M	4/25/23	Tuesday
Mail in 3 Batches	4/27, 4/28, 5/1	Thursday, Friday, Monday
Send Files to Paymentus	4/25/23	Tuesday
DUE	6/5/23	Monday
CLOSE-OUT	6/12/23	Monday

+ 4/13/23 Small Balance Write-Offs

+ 4/25/23 Generate and send electronic mortgage company files (FINTECH)

+ 4/25/23 Generate and send electronic leasing company files (BACK OFFICE)

2023/1 PAST DUE

PROCESS	DATE	DAY
REAL ESTATE		
Run File	6/20/23	Tuesday
Send File to EverView	6/21/23	Wednesday
Treasury Review	6/22/23	Thursday
Give Okay to P&M	6/23/23	Friday
Mail	6/27/23	Tuesday
PERSONAL PROPERTY		
Run File	6/21/23	Wednesday
Send File to EverView	6/22/23	Thursday
Treasury Review	6/23/23	Friday
Give Okay to P&M	6/26/23	Monday
Mail	6/29/23	Thursday

DUE	IMMEDIATELY	
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2023/1 VRW NOTICES

PROCESS	DATE	DAY
Create DMV File	7/17/23	Monday
Send File to DMV	7/18/23	Tuesday
Process Return File from DMV	7/19/23	Wednesday
Treasury/FinTech Review	7/20/23	Thursday
Send File to EverView	7/20/23	Thursday
Treasury Review	7/21/23	Friday
Give Okay to P&M	7/24/23	Monday
Mail	7/26/23	Wednesday
DUE	IMMEDIATELY	

2023/1 RE Supplemental (IN-HOUSE)

PROCESS	DATE	DAY
Run	7/27/23	Thursday
RE Review	7/28/23	Friday
Mail	7/31/23	Monday
DUE	8/31/23	Thursday

2023/1 PP Supplemental

PROCESS	DATE	DAY
Run	8/1/23	Tuesday
Send File to EverView	8/1/23	Tuesday
Treasury Review	8/2/23	Wednesday
Give Okay to P&M	8/3/23	Thursday
Mail	8/7/23	Monday
DUE	9/1/23	Friday

2023/1 RE CAN

PROCESS	DATE	DAY
Run	8/7/23	
Send File to EverView	8/8/23	
Treasury Review	8/9/23	
Give Okay to P&M	8/10/23	
Mail	8/14/23	
DUE	IMMEDIATELY	

ATTACHMENT H
MANIFEST FILE SPECIFICATIONS

Manifest file specifications for Henrico County Tax bills for use with regular bill runs ONLY (1st and 2nd half) for Real Estate and Personal Property bills. This Manifest (or Index) File should be named the same as its corresponding .zip file which contains all the .pdf images being returned to Henrico County.

RE Example: If image return file is IMAGE_TAXBILLS_RE_PRINT_20160427083935.zip then the corresponding Manifest file name would be IMAGE_TAXBILLS_RE_PRINT_20160427083935.csv. The Manifest file layout will be as follows: • Filename for each .pdf record included in the .zip file; example: 00000003_20160427083935.pdf • AccountNumber for each .pdf record; example 00900000003 • DocumentDate for each .pdf record; CCYYMMDD format, this should be the date the .pdf was created • Description for each .pdf record which should indicate the bill year, bill installment, bill type and the constant string of "TAX BILL". Example: "2016 1 RE TAX BILL"

An example of a single row would look like the following: 00000003_20160427083935.pdf, 00900000003,20160427,2016 1 RE TAX BILL

PP Example: If image return file is IMAGE_TAXBILLS_PP_PRINT_20160427083935.zip then the corresponding Manifest file name would be IMAGE_TAXBILLS_PP_PRINT_20160427083935.csv. The Manifest file layout will be as follows: • Filename for each .pdf record included in the .zip file; example: 114797_6124357_1_20160425154310.pdf • AccountNumber for each .pdf record; example 00500114797 • DocumentDate for each .pdf record; CCYYMMDD format, this should be the date the .pdf was created • Description for each .pdf record which should indicate the bill year, bill installment, bill type and the constant string of "TAX BILL". Example: "2016 1 PP TAX BILL"

Example: 2016 1 PP TAX BILL 6124357

An example of a single row would look like the following: 114797_6124357_1_20160425154310.pdf, 00500114797,20160427,2016 1 PP TAX BILL

Proposed revision 7/17/17. 114797_6124357_1_20160425154310.pdf, 00500114797,20160427, 2016 1 PP TAX BILL 6124357, PPR

ATTACHMENT I Templates

PERSONAL PROPERTY INSTALLMENT BILL



COUNTY OF HENRICO, VIRGINIA
 Department of Finance
 PO Box 90775
 Henrico, VA 23273-0775
 Phone: (804) 501-4729
 Email: TaxHelp@henrico.us

PERSONAL PROPERTY BILL

Account #:
 Bill Number:
 Bill Date:
 Due Date:

Customer:

Item Number	Description	Assessment	Tax Rate	Billed	Paid	Due
Late Payment Penalty is 10% of the unpaid balance. Interest accrues at an annual rate of 4%						
		Amount Due By				
		Total Amount Due For Year				

11440PPTN_R_1 8/24/22 307 K 3.5"

IMPORTANT PERSONAL PROPERTY TAX RELIEF INFORMATION

The General Assembly capped the total cost of the tax relief for the Commonwealth of Virginia at \$950 million. Each locality's share of the \$950 million is based upon car tax relief reimbursements from the Commonwealth to the locality for tax year 2004. These funds are allocated to provide tax relief for qualifying vehicles in the County of Henrico. The amount of car tax relief is based upon total dollars from the Commonwealth divided by the total tax of all qualifying vehicles in the County. It is possible that the portion of the total personal property tax on your vehicle that you have to pay may increase as the number of qualified vehicles in Henrico County increases. Please see the contact information on the back if you have any specific questions regarding your tax bill.

----- Tear Here and Return the Bottom Portion with Payment -----



COUNTY OF HENRICO, VIRGINIA
 Department of Finance
 PO Box 90775
 Henrico, VA 23273-0775

CHECK THIS BOX FOR CHANGE OF ADDRESS(details on back)



Account Number	Amount Due
Due Date	Amount Enclosed

Invoice Key:

TO AVOID ADDITIONAL CHARGES THE AMOUNT DUE
 MUST BE RECEIVED BY THE DUE DATE ABOVE

MAKE CHECK PAYABLE TO

ATTACHMENT I Templates

PERSONAL PROPERTY INSTALLMENT BILL Back Page

CONTACT INFORMATION

For information or questions, please call (804) 501-4PAY (4729) or email TaxHelp@henrico.us . You may submit information on the online Tax Assistance Form by visiting Henrico.us/finance. Staff is available between 8:00a.m. and 4:30p.m., Monday through Friday, excluding holidays.

BILLING AND PRORATION INFORMATION

The Vehicle License Tax is billed annually and appears on your tax bill when due. Personal Property Taxes are billed in two (2) installments in accordance with Henrico County Code §20-108. Your bill reflects both the amount currently due and your total tax liability. Henrico County prorates the Personal Property Tax on vehicles and trailers and is prorated based on the number of months the vehicle is owned and registered in Henrico County.

NOTICE TO ALL OWNERS OF LOCAL MOBILE PROPERTY

The methodology utilized to assess airplanes, boats, campers, recreational vehicles, and trailers is: (Cost x Depreciation Factor) x Tax Rate = Levy.

DUE DATES/PENALTIES AND INTEREST

The first installment is due on or before June 5th. The second installment is due on or before December 5th. If the due date falls on a weekend or legal holiday, payments are due on the first business day following the due date. Payments must be received by the due date indicated on the original tax bill to avoid a late payment penalty. Envelopes with the USPS postmark, not a postal meter stamp, dated on or before the due date are considered to be on time . Envelopes with the USPS postmark dated after the due date are considered to be late. County Residents making electronic payments directly from their bank account should allow sufficient time for their payment to reach the County 's bank account on or before the due date. Consult your bill paying service for their recommended number of days for payments to reach the County. Electronic payments received in the County's bank account after the due date are late.

A late payment penalty of 10% is assessed for all tax payments received after the due date. The late filing penalty is 10% of the total personal property tax if the Personal Property Return is not filed by the Due Date shown on the return. Interest, at a 4% annual rate, begins to accrue on the unpaid balance on the first of the month following the due date.

The County pursues collection of delinquent taxes and fees by lien (wage and bank), asset seizure, judgment, DMV hold (release fee \$25 effective September 1, 2017) on renewal of State vehicle registration (Virginia Code §46.2-752(J)), and all other legal means available. In addition, all delinquent taxes and fees will be included in the Virginia Debt Set-Off Collection Program and may halt or delay a Virginia Income Tax refund being issued.

If a payment made by check or electronic debit is returned by a financial institution, the payment will be reversed, penalties and interest will be applied, and a fee of \$50.00 will be charged. If your check is returned unpaid for insufficient or uncollected funds, we may re -present your check electronically. Your check will not be provided to you with your bank statement. A copy can be retrieved by contacting your financial institution .

If you are subject to a pending bankruptcy proceeding, this tax bill includes amounts due both prior to and after the filing of the bankruptcy petition. Amounts due prior to the bankruptcy filing are included for information only and should be handled through the bankruptcy case.

PAYMENT INFORMATION

Checks should be mailed in the remittance envelope provided. Call 1-855-748-8015, or log onto www.henrico.us/finance/payments for credit/debit card and electronic check payments. Payments made through online bill paying services must contain the correct account number and remittance address including the four digit postal code. Please check your bank's processing time for this service. Obtain a Pay Code at www.henrico.us/payments to pay your bill with cash at any 7-ELEVEN, CVS Pharmacy or Family Dollar stores. Pay in person at the Administration Building 4301 E. Parham Road or at the Eastern Government Center 3820 Nine Mile Road between 8:00 a.m. and 4:30 p.m. Monday through Friday, excluding holidays. The cashiers at the Government Centers accept cash, checks, debit cards and major credit cards. Drop boxes for check payments are available at the Eastern and Western Government Centers. To enhance our level of service and to process your payment more timely, we have changed the return address.

www.henrico.us/finance

Please check the box on the front of this coupon and complete this section to update your address

Name :					
Address :					
City:		State:		Zip:	

**ATTACHMENT I
Templates**

REAL ESTATE INSTALLMENT BILL



COUNTY OF HENRICO, VIRGINIA
 Department of Finance
 PO Box 90775
 Henrico, VA 23273-0775
 Phone: (804) 501-4729
 Email: TaxHelp@henrico.us

Account No.	<input type="text"/>	Bill Date	<input type="text"/>
Installment	<input type="text"/>	Due Date	<input type="text"/>
Mtg Code	<input type="text"/>	District	<input type="text"/>

PROPERTY LOCATION	BILL NUMBER
<input type="text"/>	<input type="text"/>

REAL ESTATE TAX BILL

PROPERTY OWNERS ON JANUARY 1	LEGAL DESCRIPTION	PARCEL ID NO.
<input type="text"/>	<input type="text"/>	<input type="text"/>

* ASSESSMENT AS OF JANUARY 1,					TAX		CREDITS	CURRENT TAX DUE	
Land	Land Use	Improvement	Abatement	Total	Tax Rate	Annual Tax	REAP	1 st Half	2 nd Half
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
								CURRENT PENALTY	
								CURRENT INTEREST	

DELINQUENT TAXES			
Year	Tax	Penalty	Interest
Special Liens	<input type="text"/>	<input type="text"/>	<input type="text"/>
Other Fees	<input type="text"/>	<input type="text"/>	<input type="text"/>



See reverse side for important tax billing, payment information and information on the County's Real Estate Advantage Program (REAP)
 *Assessment shown may be different than the January 1st assessment due to mid-year adjustments, including completed permits, etc.
 Please call (804) 501-4300 with any questions.

Amount Due By	<input type="text"/>	<input type="text"/>
2nd Half Installment	<input type="text"/>	<input type="text"/>
Total Amt Due for Year	<input type="text"/>	<input type="text"/>

Late Payment Penalty is 10% of the unpaid balance.
 Interest accrues at an annual rate of 4%.

..... Tear Here and Return the Bottom Portion with Payment

COUNTY OF HENRICO, VIRGINIA
 Department of Finance
 PO Box 90775
 Henrico, VA 23273-0775

CHECK THIS BOX FOR CHANGE OF ADDRESS (details on back)

Account Number	Amount Due
<input type="text"/>	<input type="text"/>
Due Date	Amount Enclosed
<input type="text"/>	<input type="text"/>

Invoice Key:

TO AVOID ADDITIONAL CHARGES THE AMOUNT DUE
 MUST BE RECEIVED BY THE DUE DATE ABOVE
 MAKE CHECK PAYABLE TO



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REAL ESTATE INSTALLMENT BILL

Back Page

CONTACT INFORMATION

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REAL ESTATE ADVANTAGE PROGRAM (REAP)

The County of Henrico offers the Real Estate Advantage Program (REAP) to property owners who are 65 years of age or older, or permanently and totally disabled by the end of the preceding year. This program is based on the applicant(s) meeting certain income and net worth qualifications and is in the form of an exemption or partial exemption. For more details, please call (804) 501-4PAY(4729).

DISABLED VETERANS AND SPOUSES OF SERVICE MEMBERS KILLED IN ACTION REAL ESTATE EXEMPTION

The Virginia State Constitution was amended to exempt the primary residence of a disabled American Veteran who has been rated as having a 100% service-connected, permanent and total disability by the U.S. Department of Veterans Affairs for tax years beginning on or after 2011. This exemption applies to the veteran or surviving spouse (if the veteran's death occurs on or after January 1, 2011). Additionally, beginning in 2015, the surviving spouse of a service member killed in action may also qualify for an exemption for a primary place of residence. For more information, please call (804) 501-5335.

BILLING INFORMATION

Henrico County Code §20-31 provides for payment of Real Estate Taxes in two (2) installments. Your bill reflects the amount due for the current tax year and all delinquent Taxes, Liens, or Fees.

If you have a Mortgage on your property and the Mortgage holder is escrowing funds for the payment of Real Estate taxes, it is important that you immediately forward this bill to your Mortgage Company for payment.

DUE DATES/PENALTIES AND INTEREST

The first installment is due on or before June 5th. The second installment is due on or before December 5th. If the due date falls on a weekend or legal holiday, payments are due on the first business day following the due date. Payments must be received by the due date indicated on the original tax bill to avoid a late payment penalty. Envelopes with the USPS postmark, not a postal meter stamp, dated on or before the due date are considered to be on time. Envelopes with the USPS postmark dated after the due date are considered to be late. County Residents making electronic payments directly from their bank account should allow sufficient time for their payment to reach the County's bank account on or before the due date. Consult your bill paying service for their recommended number of days for payments to reach the County. Electronic payments received in the County's bank account after the due date are late.

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The County pursues collection of delinquent taxes and fees by lien (wage and bank), asset seizure, judgment, DMV hold (release fee \$25 effective September 1, 2017) on renewal of State vehicle registration (Virginia Code §46.2-752(J)), and all other legal means available. In addition, all delinquent taxes and fees will be included in the Virginia Debt Set-Off Collection Program and may halt or delay a Virginia Income Tax refund being issued.

If a payment made by check or electronic debit is returned by a financial institution, the payment will be reversed, penalties and interest will be applied, and a fee of \$50.00 will be charged. If your check is returned unpaid for insufficient or uncollected funds, we may re-present your check electronically. Your check will not be provided to you with your bank statement. A copy can be retrieved by contacting your financial institution. If you are subject to a pending bankruptcy proceeding, this tax bill includes amounts due both prior to and after the filing of the bankruptcy petition. Amounts due prior to the bankruptcy filing are included for information only and should be handled through the bankruptcy case.

PAYMENT INFORMATION

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www.henrico.us/finance

Please check the box on the front of this coupon and complete this section to update your address

Name :					
Address :					
City:		State:		Zip:	

**ATTACHMENT I
Templates**

PERSONAL PROPERTY PAST DUE BILL



COUNTY OF HENRICO, VIRGINIA
 Department of Finance
 PO Box 90775
 Henrico, VA 23273-0775
 Phone: (804) 501-4729
 Email: TaxHelp@henrico.us

PERSONAL PROPERTY BILL

Account #:
 Bill Number:
 Bill Date:
 Due Date: **IMMEDIATELY**

Customer:

Item Number	Description	Assessment	Tax Rate	Billed	Paid	Due
<p>Late Payment Penalty is 10% of the unpaid balance. Interest accrues at an annual rate of 4%</p>						
				Amount Due By		IMMEDIATELY
				Total Amount Due For Year		

11440PRN D 12/15/21 K 35

The amount due on the coupon below is past due. Full payment must be received within 15 days from the date of this notice. If payment in full is not received the County may pursue collection of these taxes and fees through all legal means available including holds on the renewal of State Vehicle registrations through DMV (release fee \$25.00) and any State income tax refunds through the Virginia Set-Off Debt Collection program. Interest will continue to accrue until the balance is paid in full.

..... Tear Here and Return the Bottom Portion with Payment



COUNTY OF HENRICO, VIRGINIA
 Department of Finance
 PO Box 90775
 Henrico, VA 23273-0775



CHECK THIS BOX FOR CHANGE OF ADDRESS (details on back)

Account Number	Amount Due
Due Date	Amount Enclosed
IMMEDIATELY	

Invoice Key:

TO AVOID ADDITIONAL CHARGES THE AMOUNT DUE
 MUST BE RECEIVED BY THE DUE DATE ABOVE

MAKE CHECK PAYABLE TO

ATTACHMENT I Templates

PERSONAL PROPERTY PAST DUE BILL Back Page

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NOTICE TO ALL OWNERS OF LOCAL MOBILE PROPERTY

The methodology utilized to assess airplanes, boats, campers, recreational vehicles, and trailers is: (Cost x Depreciation Factor) x Tax Rate = Levy.

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www.henrico.us/finance

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Name :					
Address :					
City:		State:		Zip:	

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REAL ESTATE PAST DUE BILL



COUNTY OF HENRICO, VIRGINIA
 Department of Finance
 PO Box 90775
 Henrico, VA 23273-0775
 Phone: (804) 501-4729
 Email: TaxHelp@henrico.us

Account No.		Bill Date	
Installment		Due Date	Immediately
Mtg Code		District	

REAL ESTATE TAX BILL

PROPERTY LOCATION	BILL NUMBER

PROPERTY OWNERS ON JANUARY 1	LEGAL DESCRIPTION	PARCEL ID NO.

* ASSESSMENT AS OF JANUARY 1,					TAX		CREDITS	CURRENT TAX DUE	
Land	Land Use	Improvement	Abatement	Total	Tax Rate	Annual Tax	REAP	1 st Half	2 nd Half
								CURRENT PENALTY	
								CURRENT INTEREST	

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Year	Tax	Penalty	Interest
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 Department of Finance
 PO Box 90775
 Henrico, VA 23273-0775

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REAL ESTATE PAST DUE BILL Back Page

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www.henrico.us/finance

Please check the box on the front of this coupon and complete this section to update your address

Name :					
Address :					
City:		State:		Zip:	

**ATTACHMENT I
Templates**

VEHICLE REGISTRATION WITHHOLDING NOTICE



COUNTY OF HENRICO, VIRGINIA
 Department of Finance
 PO Box 90775
 Henrico, VA 23273-0775
 Phone: (804) 501-4729
 Email: TaxHelp@henrico.us

**PERSONAL PROPERTY
COLLECTION ACTION NOTICE**

Account #:
Customer:

Bill Number:
 Billed Date:
 Due Date: **IMMEDIATELY**

The County of Henrico recently issued a Personal Property Tax Bill to you. This bill was not paid in full. The County then issued a Past Due Notice, warning you that if this bill was not paid in full, a Department of Motor Vehicle (DMV) Registration Stop would be placed on your DMV account. As of the date of this notice, this bill remains unpaid.

In accordance with Virginia Code Title 46.2-752(J), the County has notified the Virginia DMV to withhold the registrations of all vehicles owned or co-owned by you until all delinquent taxes and fees owed to the County by you are paid in full. This means you will be unable to register or re-register your vehicles in the Commonwealth of Virginia. In addition, you are now liable for a DMV Release Fee of \$25.00 payable to the County of Henrico to cover the cost of this tax enforcement action.

Motor homes are not included in the Vehicle Registration and the Delinquent Amount due for them are not included in this notice.

YYYY Delinquent Taxes and Fees
 DMV Stop

Total Due to the County of Henrico

11440PVFNW 4/23/21 307, K 3.5

----- Tear Here and Return the Bottom Portion with Payment -----

PERSONAL PROPERTY COLLECTION ACTION NOTICE



COUNTY OF HENRICO, VIRGINIA
 Department of Finance
 PO Box 90775
 Henrico, VA 23273-0775



CHECK THIS BOX FOR CHANGE OF ADDRESS (details on back)

Account Number	Amount Due
Due Date	Amount Enclosed
IMMEDIATELY	

Invoice Key:
 TO AVOID ADDITIONAL CHARGES THE AMOUNT DUE
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**VEHICLE REGISTRATION WITHHOLDING NOTICE
Back Page**

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BILLING AND PRORATION INFORMATION

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NOTICE TO ALL OWNERS OF LOCAL MOBILE PROPERTY

The methodology utilized to assess airplanes, boats, campers, recreational vehicles, and trailers is: (Cost x Depreciation Factor) x Tax Rate = Levy.

DUE DATES/PENALTIES AND INTEREST

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www.henrico.us/finance

Please check the box on the front of this coupon and complete this section to update your address

Name :					
Address :					
City:		State:		Zip:	

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PERSONAL PROPERTY SUPPLEMENTAL BILL



COUNTY OF HENRICO, VIRGINIA
 Department of Finance
 PO Box 90775
 Henrico, VA 23273-0775
 Phone: (804) 501-4729
 Email: TaxHelp@henrico.us

**PERSONAL PROPERTY
SUPPLEMENTAL BILL**

Account #:
 Bill Number:
 Bill Date:
 Due Date:

Customer:

Item Number	Description	Assessment	Tax Rate	Billed	Paid	Due
Late Payment Penalty is 10% of the unpaid balance. Interest accrues at an annual rate of 4%		Amount Due By				
		Total Amount Due				

11440PPPS 1 8/24/22 PMS 307 K 3.5"

IMPORTANT PERSONAL PROPERTY TAX RELIEF INFORMATION

The General Assembly capped the total cost of the tax relief for the Commonwealth of Virginia at \$950 million. Each locality's share of the \$950 million is based upon car tax relief reimbursements from the Commonwealth to the locality for tax year 2004. These funds are allocated to provide tax relief for qualifying vehicles in the County of Henrico. The amount of car tax relief is based upon total dollars from the Commonwealth divided by the total tax of all qualifying vehicles in the County. It is possible that the portion of the total personal property tax on your vehicle that you have to pay may increase as the number of qualified vehicles in Henrico County increases. Please see the contact information on the back if you have any specific questions regarding your tax bill.

The total amount due on this bill does not include any past due balances.

----- Tear Here and Return the Bottom Portion with Payment -----



COUNTY OF HENRICO, VIRGINIA
 Department of Finance
 PO Box 90775
 Henrico, VA 23273-0775

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Account Number	Amount Due
Amount Enclosed	

Invoice Key:
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ATTACHMENT I Templates

PERSONAL PROPERTY SUPPLEMENTAL BILL

Back Page

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The County pursues collection of delinquent taxes and fees by lien (wage and bank), asset seizure, judgment, DMV hold (release fee \$25 effective September 1, 2017) on renewal of State vehicle registration (Virginia Code §46.2-752(J)), and all other legal means available. In addition, all delinquent taxes and fees will be included in the Virginia Debt Set-Off Collection Program and may halt or delay a Virginia Income Tax refund being issued.

If a payment made by check or electronic debit is returned by a financial institution, the payment will be reversed, penalties and interest will be applied, and a fee of \$50.00 will be charged. If your check is returned unpaid for insufficient or uncollected funds, we may re-present your check electronically. Your check will not be provided to you with your bank statement. A copy can be retrieved by contacting your financial institution .

If you are subject to a pending bankruptcy proceeding, this tax bill includes amounts due both prior to and after the filing of the bankruptcy petition. Amounts due prior to the bankruptcy filing are included for information only and should be handled through the bankruptcy case.

PAYMENT INFORMATION

Checks should be mailed in the remittance envelope provided. Call 1-855-748-6015, or log onto www.henrico.us/finance/payments for credit/debit card and electronic check payments. Payments made through online bill paying services must contain the correct account number and remittance address including the four digit postal code. Please check your bank's processing time for this service. Obtain a Pay Code at www.henrico.us/payname to pay your bill with cash at any 7-ELEVEN, CVS Pharmacy or Family Dollar stores. Pay in person at the Administration Building 4301 E. Parham Road or at the Eastern Government Center 3820 Nine Mile Road between 8:00 a.m. and 4:30 p.m. Monday through Friday, excluding holidays. The cashiers at the Government Centers accept cash, checks, debit cards and major credit cards. Drop boxes for check payments are available at the Eastern and Western Government Centers. To enhance our level of service and to process your payment more timely, we have changed the return address.

www.henrico.us/finance

Please check the box on the front of this coupon and complete this section to update your address

Name :					
Address :					
City:		State:		Zip:	

**ATTACHMENT I
Templates**

REAL ESTATE COLLECTION ACTION NOTICE



COUNTY OF HENRICO, VIRGINIA
 Department of Finance
 PO Box 90775
 Henrico, VA 23273-0775
 Phone: (804) 501-4729
 Email: TaxHelp@henrico.us

REAL ESTATE TAX BILL

Account No.		Billed Date	
Installment		Due Date	
Mtg Code		District	

PROPERTY LOCATION	BILL NUMBER

PROPERTY OWNERS ON JANUARY 1

LEGAL DESCRIPTION	PARCEL ID NO.

1144PREC 8/12/21 K 3.5'

**REAL ESTATE COLLECTION ACTION NOTICE
PAYMENT DUE IMMEDIATELY**

The County of Henrico recently issued a Real Estate Tax Bill and Past Due Notice to you; however, your account remains unpaid. This notice is our last written attempt to resolve this delinquent debt prior to being referred to Collections.

In accordance with the Code of Virginia Title §58.1, if this debt is not paid immediately, Collections may proceed with the issuance of a TAX LIEN for recovery of debt against your BANK ACCOUNT or TENANT RENTS or against your current employer for WAGES earned. If you owe two (2) or more years of delinquent taxes, this property may be sold at AUCTION.

For questions regarding your account balance, please call (804) 501-4678, Monday - Friday
8:00 a.m. - 4:30 p.m.

Total Delinquent Amount Due:

----- Tear Here and Return the Bottom Portion with Payment -----



COUNTY OF HENRICO, VIRGINIA
 Department of Finance
 PO Box 90775
 Henrico, VA 23273-0775

CHECK THIS BOX FOR CHANGE OF ADDRESS(details on back)

Account Number	Amount Due
Due Date	Amount Enclosed

TO AVOID ADDITIONAL CHARGES THE AMOUNT DUE
MUST BE RECEIVED BY THE DUE DATE ABOVE

MAKE CHECK PAYABLE TO

ATTACHMENT I
Templates

REAL ESTATE COLLECTION ACTION NOTICE
Back Page

CONTACT INFORMATION

For information or questions, please call (804) 501-4PAY (4729) or email TaxHelp@henrico.us . You may submit information on the online Tax Assistance Form by visiting Henrico.us/finance. Staff is available between 8:00a.m. and 4:30p.m., Monday through Friday, excluding holidays.

BILLING AND PRORATION INFORMATION

The Vehicle License Tax is billed annually and appears on your tax bill when due. Personal Property Taxes are billed in two (2) installments in accordance with Henrico County Code §20-108. Your bill reflects both the amount currently due and your total tax liability. Henrico County prorates the Personal Property Tax on vehicles and trailers and is prorated based on the number of months the vehicle is owned and registered in Henrico County.

NOTICE TO ALL OWNERS OF LOCAL MOBILE PROPERTY

The methodology utilized to assess airplanes, boats, campers, recreational vehicles, and trailers is: (Cost x Depreciation Factor) x Tax Rate = Levy.

DUE DATES/PENALTIES AND INTEREST

The first installment is due on or before June 5th. The second installment is due on or before December 5th. If the due date falls on a weekend or legal holiday, payments are due on the first business day following the due date. Payments must be received by the due date indicated on the original tax bill to avoid a late payment penalty. Envelopes with the USPS postmark, not a postal meter stamp, dated on or before the due date are considered to be on time . Envelopes with the USPS postmark dated after the due date are considered to be late. County Residents making electronic payments directly from their bank account should allow sufficient time for their payment to reach the County 's bank account on or before the due date. Consult your bill paying service for their recommended number of days for payments to reach the County. Electronic payments received in the County's bank account after the due date are late.

A late payment penalty of 10% is assessed for all tax payments received after the due date. The late filing penalty is 10% of the total personal property tax if the Personal Property Return is not filed by the Due Date shown on the return. Interest, at a 4% annual rate, begins to accrue on the unpaid balance on the first of the month following the due date.

The County pursues collection of delinquent taxes and fees by lien (wage and bank), asset seizure, judgment, DMV hold (release fee \$25 effective September 1, 2017) on renewal of State vehicle registration (Virginia Code §46.2-752(J)), and all other legal means available. In addition, all delinquent taxes and fees will be included in the Virginia Debt Set-Off Collection Program and may halt or delay a Virginia Income Tax refund being issued.

If a payment made by check or electronic debit is returned by a financial institution, the payment will be reversed, penalties and interest will be applied, and a fee of \$50.00 will be charged. If your check is returned unpaid for insufficient or uncollected funds, we may re-present your check electronically. Your check will not be provided to you with your bank statement. A copy can be retrieved by contacting your financial institution . If you are subject to a pending bankruptcy proceeding, this tax bill includes amounts due both prior to and after the filing of the bankruptcy petition. Amounts due prior to the bankruptcy filing are included for information only and should be handled through the bankruptcy case.

PAYMENT INFORMATION

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www.henrico.us/finance

Please check the box on the front of this coupon and complete this section to update your address

Name :					
Address :					
City:		State:		Zip:	

**ATTACHMENT I
Templates**

REAL ESTATE ASSESSMENT NOTICE

COUNTY OF HENRICO, VIRGINIA
Dept. of Finance — Real Estate Assessment Division
PO Box 90775
Henrico, VA 23273-0775



Commonwealth of Virginia
COUNTY OF HENRICO
NOTICE OF REAL ESTATE ASSESSMENT
THIS IS NOT A TAX BILL

Telephone: 804-501-4300
Hours: 8:00am to 4:30pm
Monday through Friday

11/19/2020 10:01:00 AM

NOTICE OF REAL ESTATE ASSESSMENT

THIS IS NOT A BILL

Parcel ID and Legal:

VID #:

Property Address:

Magisterial District:

*The 2021 tax rate will be set by the Board of Supervisors during the budget process in April. The 2020 rate is used for comparison purposes only. The tax is based on the final assessed value divided by 100 multiplied by the tax rate.

Assessment appeals must be filed by April 1st of the current year.

Property owners have the right to view and make copies of records maintained by the Assessment office pursuant to 58.1-3331 and 58.1-3332 of the Code of Virginia.

ATTACHMENT I Templates

REAL ESTATE ASSESSMENT NOTICE

Back Page

Commonwealth of Virginia

COUNTY OF HENRICO

NOTICE OF REAL ESTATE ASSESSMENT - THIS IS NOT A TAX BILL

Real Estate Tax Rate

The Henrico County Board of Supervisors during one of its meetings in February or March of 2021 will set a date and time for a public hearing on the proposed 2021 real estate tax rate. It is anticipated that the public hearing will be in April of 2021 and will be held in the Board Room at the Henrico Government Center located at 4301 East Parham Road. The time, date and place of the public hearing will be advertised in the Richmond Times Dispatch.

Function of the Real Estate Assessment Division

Title 58.1-3201 of the Code of Virginia provides for the assessment of real property at 100% of fair market value. Fair market value is the probable amount a property would sell for today if exposed to the market for a reasonable period. Henrico County employs an annual reassessment program to ensure that property is assessed uniformly and at fair market value. The Real Estate Assessment Division under the Department of Finance is charged with the review and reassessment of all real property effective January 1 of each year.

How Assessments are Determined

Real estate assessments are based on the typical selling prices of comparable properties and reflect the actions of buyers and sellers in the local market. In determining the assessments appraisers consider the sales comparison, cost and income approaches to value.

Notice of Assessment

Beginning in February of each year, all property owners are mailed a notice of assessment. The mortgage company should be notified if there is a change in the assessment. Title 58.1-3330 of the Code of Virginia requires that any person other than the owner who receives this notice shall transmit it to the owner at the last known address immediately upon receipt.

"Land Use" value on the notice represents the use value assessment (qualifying and non-qualifying acreage) of property enrolled in the Land Use program. The sum of "Land Use" value and "Building" value is the total taxable assessment for participating properties. "Land" value represents market value of the land.

Real Estate Assessment Appeal

Formal reconsideration of an assessment is warranted if a property owner believes the assessed value is in excess of fair market value, is based on incorrect information, or is inequitable in comparison with similar properties. To initiate your appeal simply call 804-501-4300 or email your request to AssessmentAppeal@henrico.us. By law, assessment appeals must be filed no later than April 1 of the current year.

Assessment Information

Real estate assessment information is available seven days a week, 24 hours a day via the County's Internet site at <https://henrico.us/finance/disclaimer/>. If you have additional questions, our customer service staff is available at 804-501-4300 during normal business hours Monday through Friday from 8:00am to 4:30pm.

Other Related Services

The County offers a **Partial Tax Exemption Program** for certain rehabilitated residential, multi-family, commercial/industrial, and hotel/motel properties. The structure must meet minimum age requirements based on the property type. For residential property, the total assessed value shall not exceed \$300,000 and the structure must be at least 26 years old. Qualification also includes other criteria. There is also a partial tax exemption for demolished or rehabilitated derelict buildings, which have been designated as such by the Building Official. For additional information, call 804-501-4300 or visit the Real Estate Assessment Division website at <https://henrico.us/finance/divisions/real-estate-division/>.

The County maintains a **Land Use Program** that provides for the assessment of qualifying land based on agricultural, horticultural, forestry, or open-space use value rather than market value. Forest land eligibility includes a 20 acre minimum and the other classifications require a 5 acre minimum. Applications are due by November 1. For additional information, call 804-501-4306.

The County of Henrico has a **Real Estate Advantage Program (REAP)** for property owners who meet certain criteria, are age 65 or older or totally and permanently disabled. For more information call 804-501-4263.

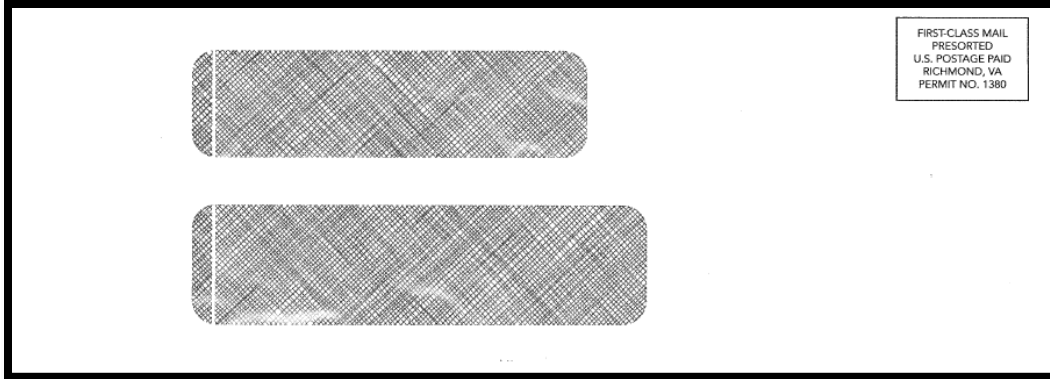
Spouses of Soldiers Killed In Action and Totally and Permanently Disabled Veterans who meet certain criteria may receive tax exemption on their residence. For additional information call 804-501-4306.

Real Estate Tax Due Dates

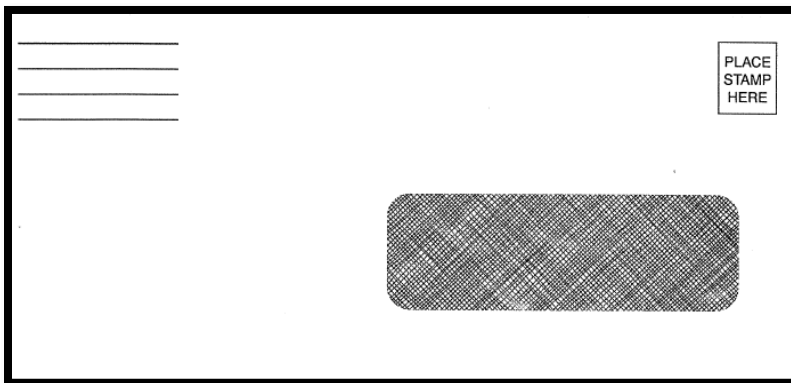
Real estate taxes are billed semi-annually with the first half payment due on June 5 and the second half payment due on December 5. Reassessment notices are mailed to the property owner, however, the tax bills are typically sent directly to the mortgage company.

ATTACHMENT I Tax Mailing Envelopes

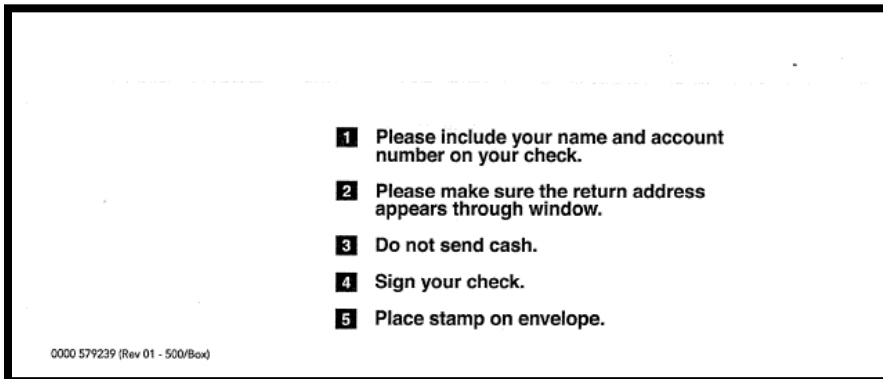
Tax Mailing Envelope #10 2 Windows



Tax Mailing Return Envelope #9 2 Windows



Tax Mailing Return Envelope #9 Back



ATTACHMENT J SEPARATE EXCEL SPREADSHEET