

Wetzel County Assessor's Office

Scott Lemley, Assessor
Corner of Main & Washington Streets
P.O. Box 7, Courthouse
New Martinsville, WV 26155

Phone: 304-455-8216 Real Estate
304-455-8214 Personal Property
FAX: 304-455-6823
email: slemley@wvassessor.com

Cathy Phillips, Assistant Chief Deputy

Beth Hayes, Chief Deputy

Jennifer White, Reappraisal Coordinator

Received

JUL 5 2023

WV Ethics Commission

June 30, 2023

Minutes Lobbying Services Bid Opening

Time Started: 2:19 p.m.

Time Finished: 2:22 p.m.

Jennifer Cain and Cathy Brown witnessed the bid opening for the Wetzel County Assessor's Office Lobbying Services. No one from the public was present for the bid opening. The Wetzel County Assessor received three bids. The bids were sealed and met the bidding requirements outlined in the Class II Legal Advertisement.

The three bids were from:

- 1) Capitol Resources, LLC, Conrad Lucas, Golden Horseshoe Strategies, LLC
- 2) Mason Consulting, Hallie Mason
- 3) Shuman, McCuskey, and Slicer PLLC, Caleb B. David, Esq.

The bids were accepted and approved as presented.

Sincerely,



Scott Lemley

Witnessed by:



Cathy Brown, Assistant Real Property Deputy



Jennifer Cain, Personal Property Clerk and Bookkeeper



TO: Wetzel County Assessor's Office (ATTN: Scott Lemley)
FROM: Conrad Lucas, Golden Horseshoe Strategies, LLC
RE: Response & Bid for Professional Services for Wetzel County Assessor's Office
DATE: June 23, 2023

Bid Response

This bid is being submitted by Golden Horseshoe Strategies, LLC (an affiliate of Capitol Resources, LLC) in response to the recent solicitation published in the *Wetzel Chronicle* stating the Wetzel County Assessor's Office will be "professional services advocating for legislation regarding real property and personal property assessment legislative bills at the West Virginia Capitol."

Contact:

Capitol Resources, LLC – West Virginia d/b/a Golden Horseshoe Strategies, LLC

Contact: Conrad Lucas

Phone: (304) 962-2567

Mail: Golden Horseshoe Strategies, LLC, P.O. Box 11059, Charleston, WV 25339

Email: clucas@capitolresourcesllc.com

Overview

Golden Horseshoe Strategies, LLC is proud to respond to this request from the Wetzel County Assessor's Office. Conrad Lucas serves as the principal lobbyist for Golden Horseshoe Strategies, LLC and would represent the Wetzel County Assessor's Office for professional services and register as a lobbyist with the West Virginia Ethics Commission.

Background

Conrad Lucas serves as the West Virginia consultant for Capitol Resources, LLC, d/b/a in West Virginia as Golden Horseshoe Strategies, LLC. Capitol Resources, LLC is one of the largest government relations firms in the Southeast with a presence in Texas, Louisiana, Mississippi, Alabama, Georgia, Florida, Tennessee, South Carolina, West Virginia and Washington, DC. Lucas has been part of Capitol Resources since 2014 and represents a variety of clients at the state capitol as well as leading numerous grassroots/grasstops campaigns on political and legislative matters. Lucas previously chaired the West Virginia Republican Party and oversaw historic successes while also serving as a member of the Republican National Committee. As a lobbyist, Lucas has demonstrated success in tort reform, procurement, education and administrative matters. He began his career as an aide to now U.S. Senator Shelley Moore Capito (R-WV). An attorney by training, Lucas holds degrees from Vanderbilt (B.S. and Ed.D.),

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Harvard (Ed.M.) and Tulane (J.D.). He and his wife, LeFlore Barbour Lucas, reside in Charleston, WV. Lucas's resume is included as an attachment.

Scope of Services

The scope will begin with a focus on legislation related to real property and personal property assessment legislative matters at the West Virginia Capitol and may also include other matters impacting the Wetzel County Assessor's Office related to administrative law, appraisal matters and rulemaking as determined by Scott Lemley.

Specifically, the focus will include:

- 1) Oil, Natural Gas, and Natural Gas Liquids assessment legislation for working interest, royalty interest, and overriding royalty interest,
- 2) Constitutional Amendment increasing the Homestead Exemption from \$20,000 to \$25,000,
- 3) Expanding the eligibility for Tax Classification Two (02) on real estate parcels,
- 4) Constitutional Amendment eliminating the personal property tax on inventory,
- 5) Any other potential legislation that is introduced that may impact the assessment and taxability of real and personal properties within Wetzel County.

Services include advocacy and issues management with legislative leadership and key decisionmakers on the legislative Rules, Judiciary, Finance and Government Organization committees. Managing matters related to assessment laws related to ad valorem taxation, property taxes and others that are key to effective assessment in West Virginia will include coalition building, legislative drafting and direct issue advocacy. Reporting to the Wetzel County Assessor's Office will include real-time updates on matters as needed, status reports and other communication determined during the duration of the engagement.

Compliance

Conrad Lucas and Golden Horseshoe Strategies, LLC will comply with all laws, rules and regulations applicable to activities related to this Agreement and its performance hereunder, including but not limited to any and all registration, reporting and other applicable requirements.

Proposed Contract Budget

Beginning July 1, 2023, Golden Horseshoe Strategies, LLC respectfully proposes a monthly retainer of \$5,000 (five-thousand dollars) for a minimum of one-year totaling \$60,000 (sixty-thousand dollars) plus pre-approved expenses. Also, during the Legislative Session months from January 1, 2023 – April 15, 2023, Golden Horseshoe Strategies proposes additional support from Hallie Mason with Mason Consulting for a flat fee of \$25,000 (twenty-five thousand dollars) for additional legislative monitoring matters. Billing would be submitted at the conclusion of each month. Mileage reimbursements would be at the current IRS stated rates and included in monthly billing. Note that the proposal is subject to conversation with Scott Lemley.

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References

Hon. Roger Hanshaw
Speaker, West Virginia House of Delegates
(304) 437-5885
rhanshaw@bowlesrice.com

U.S. Sen. Shelley Capito
United States Senator
Chief of Staff: Joel Brubaker
(202) 224-6472
Joelbrubaker44@gmail.com

Rep. David McKinley
Former Member of Congress
Former Chief of Staff: Mike Hamilton
(603) 296-5116
Mphamilton04@gmail.com

Golden Horseshoe Strategies, LLC sincerely appreciates the opportunity to be considered for this opportunity and is happy to answer any questions related to this proposal at any time.

Respectfully Submitted,



Conrad G. Lucas II
President
Golden Horseshoe Strategies, LLC

Enclosure

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Conrad G. Lucas II

1593 Hampton Road
Charleston, WV 25314

conrad.g.lucas@gmail.com
(304) 962-2567

Education

Vanderbilt University, Ed.D.

Nashville, TN

Doctor of Education, May 2010

Department: Leadership, Policy & Organizations

Major: Higher Education Leadership & Policy

Capstone: "Assessing Integrative Learning at Eastern Illinois University"

Tulane University, J.D.

New Orleans, LA

Juris Doctor, May 2008

Honors: Moot Court Senior Justice; CALI Award for "Reading Writing & Rebuilding: Education in Post-Katrina New Orleans"

Certificate: Environmental Law & Policy

Cornell University, Certificate

Paris, France

Summer 2006

Certificate in International Law earned through a program at the University of Paris (Sorbonne)

Harvard University, Ed.M.

Cambridge, MA

Master of Education, June 2005

Major: Education Policy & Management

Research: "From the Stadium to the Admissions Office: The effect of College Athletic Conferences on Higher Education," (Harvard Graduate Student Research Conference, 2005)

Vanderbilt University, B.S.

Nashville, TN

Bachelor of Science, Magna Cum Laude, May 2003

Major: Human & Organization Development

Minor: American History

Honor: First Place in Undergraduate Public Speaking Competition

Policy & Political Experience

Golden Horseshoe Strategies/Capitol Resources-WV

Charleston, WV

President

(October 2013 – Present)

Currently represent a variety of clients in government affairs, marketing, strategic communication and lobbying with local, state and federal officials in West Virginia. Client base spans the gamut from education to technology to healthcare. Have overseen statewide political, grassroots/grass-tops efforts on numerous fronts, managed teams for such efforts and

raised funds for independent expenditure efforts. Affiliated with Jackson, Mississippi-based Capitol Resources, LLC from 2014 to present.

West Virginia Republican Party
Chairman

Charleston, WV
(May 2012 – January 2018)

Twice elected to oversee all operations of the West Virginia Republican Party. Primary responsibilities included fundraising, developing political strategies, messaging, communicating with the public and serving as the face of the Party. Held designation as the youngest Party chair in the United States. Accomplishments included:

- Raised nearly \$5 million in a highly restrictive campaign finance environment
- Oversaw Republicans gaining majorities in the West Virginia House and Senate for the first time in eighty-four years in 2014.
- During the 2016 election cycle, oversaw the election of Republicans to all but one statewide office for the first time in nearly a century.
- Completed a near sweep of all federal offices for Republicans in West Virginia including the first Republican U.S. Senator in nearly sixty years.
- Served as an elected member of the Republican National Committee Rules Committee for nearly six years.
- During the 2010 election cycle, served as the RNC Victory Director to manage field operations and “get out the vote” efforts in West Virginia.

U.S. Senator Shelley Capito (R-WV)
Deputy Press Secretary
Campaign Intern
Congressional Intern

Charleston, WV & Washington, DC
(May 2003-January 2004)
(Summer 2002)
(Summer 2001)

Assisted with development and implementation of district and legislative communications initiatives; wrote legislative op-eds and speeches; tracked key legislative initiatives; worked with media to publicize events; issued press releases and organized events. Served as in-State point of contact for now Senator Capito for all media.

Cowen Institute at Tulane University
Policy Analyst

New Orleans, LA
(August 2007-May 2008)

Worked with non-profit education advocacy group during law school to develop a legislative policy agenda, advocate for positions with legislators and officials, draft legislation, track key legislation, provide academic research to support positions and market initiatives with stakeholders in post-Katrina Louisiana.

Legal Experience

City of Charleston Municipal Court
Clerk

Charleston, WV
(February 2013-April 2023)

Manage the criminal court dockets for busy Municipal Court System in West Virginia's largest city. Serve as a back-up judge for the Court when the elected judge is unavailable or has a conflict.

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Huddleston Bolen LLP*Associate**Summer Associate*Practice Groups: Corporate Transactional and Litigation**Huntington, WV***(June 2008-June 2009)**(June 2007-August 2007)*

Served in a supportive capacity for corporate practice groups spanning from energy companies to health care providers. Drafted motions, orders and interrogatories, conducted research and prepared briefs.

Additional Professional Experience**Mountain State University***Adjunct Professor***Beckley, WV***(Fall 2009-Summer 2011)*

Taught the introductory course "Perspectives on Leadership" for the doctorate in executive leadership program.

West Virginia Department of Education*STOP the Violence Program Lead Facilitator***Charleston, WV***(Fall 2001-May 2003)*

Presented seminars to middle and high school students on the topic of youth violence and how to recognize and prevent it; successfully co-directed fundraising to support program (part-time contractual basis).

Family, Career & Community Leaders of America*Program Facilitator***Reston, VA***(Summer 1999-Fall 2000)*

Traveled the nation presenting the A-PLUS (A Positive Lifestyle for Ultimate Success) program to high school and middle school students for this national organization (part-time contractual basis).

Non-Profit Board & Volunteer Experience**Dress for Success – River Cities***Board Member & Vice-President***Huntington, WV***(December 2009-Present)*

Serve as a member of the leadership team of a non-profit organization that raises funds and solicits donations to provide work clothes and job training skills for disadvantaged women.

West Virginia STEM Advisory Council*Member***Charleston, WV***(Spring 2018)*

Named by the West Virginia Department of Education as a member of an advisory council to develop a plan for STEM Education in the Mountain State.

Lincoln County Economic Development Authority*Board Member & Vice-President***West Hamlin, WV***(July 2009-January 2015)*

Supported and oversaw the operations of a regional economic development organization by negotiating contracts, drafting legal documents, marketing the local industrial park, assisting in grant procurement and lobbying for support from state level officials.

Tulane University Law School Dean's Advisory Council
Member

New Orleans, LA
(Spring 2006)

Served as a member of the of the advisory council following Hurricane Katrina.

Vanderbilt University
Various Roles

Nashville, TN
(Various since 2003)

Served on both the Attendance and Fundraising Committees for the Vanderbilt Homecoming/Reunion 2008. Chaired the Fundraising Committee for 2013; President of the Lambda Chi Alpha Fraternity Housing Corporation 2006-2007 and a member of the Lambda Chi Alpha Alumni Advisory Board from 2005-2013; Chaired the "Next 10 Alumni Council" in 2018.

West Virginia Commission for National & Community Service
Grant Reviewer

Charleston, WV
(1997-1999)

Served as the youth representative to the state agency that oversaw the AmeriCorps program funding in West Virginia.

Honors/Awards

- CTK Campfire Selectee (2019)
- America-Swiss Foundation "Young Leader Award" (2015)
- West Virginia *State Journal* "Forty Under Forty" (2015)
- Generation Huntington Award (2014)
- *Campaigns & Elections* Magazine "Top Influencers" (2014)
- West Virginia Governor's Community Service Award (1997)

Professional Affiliations

- Member, West Virginia Bar Association (2009 – Present)
- Federalist Society (2005 – Present)
- Republican National Lawyer's Association (2012 – present)

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SHUMAN McCUSKEY SLICER PLLC

ATTORNEYS AT LAW

116 South Stewart Street, 1st Floor
Winchester, VA 22601
Telephone: 540.486.4195
Facsimile: 540.486.4912

1411 Virginia Street East, Suite 200
P.O. Box 3953
Charleston, WV 25339
Telephone: 304.345.1400
Facsimile: 304.343.1826

300 Wedgewood Drive, Suite 110
Morgantown, WV 26505
Telephone: 304.291.2702
Facsimile: 304.291.2840

WWW.SHUMANLAW.COM

Caleb B. David
cdavid@shumanlaw.com

June 28, 2023

Received

JUL 5 2023

WV Ethics Commission

Scott Lemley
Wetzel County Assessor
P.O. Box 7
New Martinsville, WV 26155

Re: Bid Proposal for Lobbying Services

Dear Scott:

Please consider this a formal proposal by the law firm of Shuman McCuskey Slicer PLLC (the "Firm") to provide lobbying services to the Wetzel County Assessor (the "Assessor"). It would be our pleasure to assist the Assessor in achieving his policy goals. The following is a proposal for services submitted for your consideration.

1. **Services.** The "Services" for which this Firm would be engaged to represent the Assessor involve lobbying services to achieve the Assessor's policy goals. The Firm would assist the Assessor in achieving his policy goals by drafting legislation, advocating the Assessor's interests with executive and legislative officials, monitoring proposed legislation and regulations, including any legislation and/or regulations related to taxability laws and appraisal and assessment laws regarding ad valorem taxation, advising the Assessor regarding the potential impact of proposed legislation and regulations, and any other activities necessary to assist the Assessor in achieving his policy goals.

2. **Fees.** The Firm's fees for representing the Assessor would be \$4,000.00 monthly. Our unit costs for copying are \$0.12 per page; costs for mileage are as allowed by the IRS; and postage is billed at actual cost. No mileage will be billed for travel within Kanawha County. Expenses will be billed monthly unless otherwise agreed upon.

3. **Scope of Representation.** The Firm's representation will include all activities necessary to fully represent the Assessor's interests in connection with the Services outlined above.

4. **Relevant Experience and Qualifications.** This Firm has over two decades of significant litigation experience on behalf of various county governments and political subdivisions, including

the Wetzel County Assessor's Office. We also have significant experience in oil and gas law and in government relations and lobbying. We have experience in assisting clients by drafting legislation, advocating our clients' interests with executive and legislative officials, and monitoring proposed legislation and regulations and advising our clients of their potential impact. Our Firm also assists our clients by advocating their positions through media outlets to cultivate public support or opposition to legislation. The Firm's qualified attorney/lobbyist whom we propose to provide these Services is Member Caleb B. David. Mr. David is a Super Lawyers Rising Star attorney and has been recognized as One to Watch by Best Lawyers. Mr. David has a diverse legal practice. Most notably, he has served as general counsel for the Wetzel County Assessor's Office for the past five years. He has assisted the Wetzel County Assessor's Office in a vast array of areas and has knowledge of the policy issues facing West Virginia's County Assessors. Mr. David also represented the Wetzel County Assessor's Office and the Association of West Virginia Assessors during the 2021 legislative session and represented the Wetzel County Assessor's Office during the 2022 and 2023 legislative sessions. A copy of Mr. David's biography is attached hereto for your review.

5. Compliance with Laws. The Firm is in compliance with the laws of the State of West Virginia governing the operation of a business. It is registered with the West Virginia Secretary of State, and it has a business franchise license issued by the West Virginia State Tax Department. The Firm has filed all of its required tax returns on time, and it has remitted its required payments, including withholdings for its employees, to the proper authorities. The Firm's attorneys possess valid licenses to practice law in West Virginia and are in good standing with the West Virginia State Bar. Attorneys in the Firm have not been subject to reprimand by the West Virginia State Bar, or other entities, for unethical conduct. The Firm subscribes to Travelers for its workers' compensation coverage for its employees, and those premiums have been paid. The attorneys who represent clients as lobbyists will comply with all registration requirements.

6. Professional Liability Coverage. The Firm has professional liability coverage through QBE Insurance Corporation in an amount of not less than \$5 million, the premiums of which have been paid. A certificate of said professional liability coverage will be provided upon request.

7. Outcome of the Services. The Firm nor any member or employee of the Firm can guarantee, promise, or warranty the outcome of the Services described above. The Firm cannot guarantee, promise, or warranty that its Services will result in achievement of the policy goals of Assessor.

8. References. The Firm can put you in contact with references upon request. Because the Firm represents the Assessor's Office, the Assessor is familiar with the Firm and its attorneys and lobbyists. The Firm would be happy to provide references at any time.

9. Conflicts. The Firm has no known conflicts of interest at this time. The Firm will promptly notify the Assessor of any potential conflicts of interest should any arise.

Assessor Scott Lemley
June 28, 2023
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If you have any questions regarding the contents of this proposal, please do not hesitate to contact me. Thank you for your consideration in this regard.

Very truly yours,



Caleb B. David



PO Box 4853
Charleston, WV 25364

304.539.2742
Hallie@ConsultingWV.com

ConsultingWV.com

Received
JUL 5 2023
WV Ethics Commission

Biography for Hallie Mason

Hallie Mason has over 20 years of government and lobbying experience in West Virginia. As the principle lobbyist for Mason Consulting, she advocates for client interests in a variety of fields, particularly health care, technology, child welfare, and higher education.

Hallie has extensive experience with the state budget process. She served as a budget analyst with the West Virginia House of Delegates Finance Committee for nine years. She also served as Governor Earl Ray Tomblin's Director of Public Policy for four years where she was point staff for the budget, education, and healthcare matters.

Hallie is actively serves her community as an office volunteer at George Washington High School and serves in her church nursery.

Hallie is married to Grant Mason, a dentist in Charleston, and has three teen-aged children.

2020 Legislative Session Client List

The College Board
Microsoft
Charleston Area Medical Center
Children's Home Society of WV
Save the Children
West Virginia Nurses' Association
Tidal Basin
Pharmaceutical Care Management Association
West Virginia Association of Alcoholism and Drug Abuse Counselors
West Virginia Dental Association
West Virginia Association of Regional Colleges and Universities
KEPRO

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OFFICIAL AD PROOF

This is the proof of your ad scheduled to run in **Wetzel Chronicle** on the dates indicated below. If changes are needed, please contact us prior to deadline at (304) 455-3300.

Notice ID: F3NECx5fSLLpBmIQBAOA | **Proof Updated: Jun. 08, 2023 at 12:21pm EDT**
Notice Name: Professional Services Lobbying | Publisher ID: LC0520

This is not an invoice. Below is an estimated price, and it is subject to change. You will receive an invoice with the final price upon invoice creation by the publisher.

FILER

Scott Lemely
slemley@wvassessor.com
(304) 455-8216

FILING FOR

Wetzel Chronicle

Columns Wide: 2

Ad Class: Legals

06/14/2023: NP - Liner Rate Notice	59.07
06/21/2023: NP - Liner Rate Notice	59.07
06/28/2023: NP - Liner Rate Notice	59.07

Subtotal	\$177.21
Tax	\$0.00
Total	\$177.21

See Proof on Next Page

Received
JUL 5 2023
WV Ethics Commission

The Wetzel County Assessor's Office will be contracting for professional services advocating for legislation regarding real property and personal property assessment legislative bills at the West Virginia Capitol. The individual providing a bid regarding this proposal needs to include the following information:

- 1) Resume.
- 2) Scope of services the individual will be able to provide regarding legislative matters such as taxability laws and appraisal and assessment laws regarding ad valorem taxation.
- 3) Retainer costs, hourly costs or hourly rates, and any other costs and/or fees associated with the contractual agreement.
- 4) Reimbursement for mileage or gasoline expenses and
- 5) References

The Wetzel County Assessor's Office requires the lobbyist to report any potential conflict regarding legislative bills and priorities immediately to the assessor. It is the responsibility of the lobbyist to address any concerns or prioritization of legislative matters regarding the Wetzel County Assessor's Office and other clients of the lobbyist to the assessor. The lobbyist will not be required to attend any conference calls or meetings regarding other county officials or county association groups. The lobbyist may choose to attend such meetings or conference calls but this is not a requirement or mandate of the Wetzel County Assessor's Office.

Specific areas of legislative interest include:

- 1) Oil, Natural Gas, and Natural Gas Liquids assessment legislation for working interest, royalty interest, and overriding royalty interest.
- 2) Constitutional Amendment increasing the Homestead Exemption from \$20,000 to \$25,000.
- 3) Expanding the eligibility for Tax Classification Two (02) on real estate parcels.
- 4) Constitutional Amendment eliminating the personal property tax on inventory.
- 5) Any other potential legislation that is introduced that may impact the assessment and taxability of real and personal properties within Wetzel County.

The successful bid or bidders' contract(s) will be valid from July 1, 2023 through December 31, 2024.

The bid needs to be placed in a sealed envelope and marked "sealed bid" on the outside of the envelope for professional services. The bids need to be mailed to the Wetzel County Assessor's Office, 210 Main Street, PO Box 7, New Martinsville WV 26155. The bids need to be received and in the Wetzel County Assessor's Office (not postmarked) by 3:00 p.m. on Thursday, June 29, 2023. The bids will be opened on Friday, June 30, 2023 at 11:00 a.m. in the real property side of the Wetzel County Assessor's Office. Anyone from the public is welcome to attend the bid opening. If you have any questions, please contact Scott Lemley at 304-455-8216. The Wetzel County Assessor's Office reserves the right to accept or reject any and all bids.

Best Value Procurement

The Assessor's Office will select which proposal to accept based on Best Value Procurement practices. Under Best Value Procurement, the Assessor's Office will consider the proposed price, and the total cost of acquiring, operating, maintaining and supporting the requested commodity or service over its projected lifetime, balanced with the evaluated manner in which the proposal addresses the business objectives set forth in the Request for Proposal. While the price is a key consideration, this does not mean that the Assessor's Office will necessarily select the lowest bid; it will select the bid that, after due and thorough evaluation, is determined to most effectively meet the needs of the Assessor's Office for the best value.

Scott Lemley
Wetzel County Assessor

WC 6/14 6/21 6/28

WC 6/14, 6/21, 6/28 #####

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WETZEL CHRONICLE

REC-1191

Column Software PBC
PO Box 208098
Dallas, TX 75320-8098
help.column.us

Paid by
Wetzel County Assessor's Office

Receipt number
Invoice number EA5A20DA-0004
Notice ID F3NECx5fSLlpBmIQBAOA
Order Number LC0520
Publisher Wetzel Chronicle
Date paid Jun 8, 2023
Payment method VISA - 8466

Description	Qty	Unit price	Amount
06/14/2023; NP - Liner Rate Notice	1	59.07	59.07
06/21/2023; NP - Liner Rate Notice	1	59.07	59.07
06/28/2023; NP - Liner Rate Notice	1	59.07	59.07
=== Notes ===		Subtotal	\$177.21
Notice Name: Professional Services Lobbying		Tax	0.00
Order Number: LC0520		Amount paid	\$177.21

Received

JUL 5 2023

WV Ethics Commission

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Scott Lemley
Wetzel County Assessor

WC 6/14 6/21 6/28

WC 6/14, 6/21, 6/28 #####

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