



Sites Project Authority

Request for Qualifications Real Estate Appraisal Services RFQ No. 22-03

July 8, 2022

**Qualifications Submittal Deadline
July 29, 2022
Noon Pacific Standard Time (PST)**

**Form of Submission
Electronic Submittal Only**
jtrapasso@sitesproject.org

Contact Person
Joe Trapasso Program Operations Manager
Sites Reservoir Project
jtrapasso@sitesproject.org

Request for Qualifications Real Estate Appraisal Services RFQ No. 22-03

1.0 Overview/Background

The Sites Project Authority (Authority) is soliciting Statement of Qualifications (SOQs) from qualified firms (each a Respondent) interested in providing On-Call Real Estate Appraisal Services for the implementation of the Sites Reservoir Project (Project).

The Authority intends to select a list of pre-qualified real estate appraisal service providers to provide, on an as-needed basis, real property appraisal services to the Authority for a mix of full, partial, temporary or easement acquisitions as necessary for the construction of the Project. Service providers selected for the inclusion on the On-Call list will be contracted under the selected firm's Standard Services Agreement with the Authority's Addendum A.

Project Overview

The Authority is a joint exercise of powers authority formed on August 26, 2010, pursuant to Government Code Section 6500 et seq. The Authority is governed by a 9-voting member Board of Directors that includes several local water agencies and both Colusa and Glenn counties. The Authority receives advisory support from the 23 local water agencies located statewide (Reservoir Committee) who have entered into Project agreements to advance the Sites Reservoir and related facilities.

The Authority is working in partnership with both the U.S. Bureau of Reclamation (Reclamation) and the California Department of Water Resources (DWR) to ensure the Sites Reservoir is operated in a manner that does not harm their operations and improves the operation of the State and Federal interdependent water systems for both consumptive and environmental beneficial uses.

When operated in a cooperative manner with other Northern California reservoirs such as Shasta, Oroville and Folsom – which function as the backbone to both the Central Valley Project and the State Water Project – Sites Reservoir will greatly increase the flexibility, reliability and resiliency of statewide water supplies in drier periods. These operations with the State and Federal projects are one of several inter-agency agreements required for the implementation of the Project.

The Sites Reservoir is located 10 miles west of the town of Maxwell in rural Glenn and Colusa counties. This Project will be up to a 1.5 million acre-foot off-stream surface water storage

facility. It will divert stormwater flows from the Sacramento River, after all other water rights and regulatory requirements are met, for subsequent release for environmental use and use by California communities, farms and businesses when called upon, primarily planned for use in drier years. It will be the state's 7th largest reservoir when built and would increase surface water storage in the Sacramento Valley in the range of 15 percent. For additional Project location and other Project information please visit the Project website at www.sitesproject.org.

To construct the Project, the Authority will need to acquire approximately 15,000 acres of land for the Project's facilities. Real Estate Appraisal Services will be needed to support the Project's negotiations relating to the affected lands.

The lands anticipated to be affected by the project facilities, include, but are not limited to:

- Residential, including
 - Developed and Undeveloped Home Sites
 - Residential Agricultural
- Agricultural, including
 - Pasture and Grazing Lands
 - Row Crops
 - Permanent Plantings
- Commercial
- Industrial
- Open Space
- Special Use –Local-Public-Agency-Owned Land; Cemetery

2.0 Anticipated Scope of Work

Under the leadership of the Authority's External Affairs Manager, the general scope of the Real Estate Valuation Services Provider is to assist the Authority in providing appraisals and valuation deliverables. These services will support the engagement and negotiations with Landowners, and the overall negotiation and public acquisition process.

The anticipated project footprint and facility layout is expected to create both full and partial acquisitions of real property, including impacts to improvements, possible curative costs, and severance considerations. Additional assignments may include, but are not limited to, Conservation Easement Valuation, Surplus Land Valuation, Leasehold Valuation, Market Rental / Lease Rate Analysis. Appraisal Assignments are anticipated to be Full Narrative in nature, unless a more succinct format will suffice for the intended purposes.

3.0 Required Qualifications

The qualified Respondents shall meet the following qualification requirements:

1. Have the ability and expertise to accurately appraise properties based on the following:
 - a. Property type:
 - i. Residential and commercial land and structures.
 - ii. Agricultural land and structures
 - b. Appraisal Type:
 - iii. Property acquisition
 - iv. Temporary or permanent easement
2. Provide appraisals that conform with the Uniform Relocation Assistance and Real Property Acquisition Act (Uniform Act CFR 49, Part 24, as amended) and Uniform Standards of Professional Appraisal Practice (USPAP) to determine just compensation in compliance with California Law.
3. Have the appropriate license and/or certification and experience per the guidelines of the California Bureau of Real Estate Appraisers, in accord with the degree, complexity, and value of the proposed work, with copy of applicable licenses to be included as part of the Respondent's Statement of Qualifications.
4. Demonstrate a minimum of five years' experience in the valuation and appraisal of land rights for public acquisition purposes, under the Uniform Relocation Assistance and Real Property Acquisition Act (49 CFR Part 24, as amended) and Uniform Standards of Professional Appraisal Practice (USPAP). Respondent shall include a list and description of selected appraisal assignments and/or public infrastructure projects substantiating this experience. A demonstrated familiarity and experience with the local project area of the Sacramento Valley is preferred.
5. Comply with all Federal, State, and local laws, codes, and ordinances without cost to the Authority.
6. Commit an experienced Project Manager who will be responsible for coordinating the services with the Authority's External Affairs Manager. All professionals assigned to the project shall be skilled, knowledgeable, and successfully experienced in all aspects of providing the required services.
7. Have the ability to provide field visits within 48 hours' notice.

8. Provide in-house quality control with the work product.

4.0 General RFQ Requirements

The RFQ issue date is July 8, 2022. Prospective RFQ respondents may submit written questions about this RFQ by Noon PST on July 15, 2022 via email to: jtrapasso@sitesproject.org.

The Contact Person (refer to cover page) will officially respond to any questions and clarifications in an addendum which will be provided to all potential respondents. Questions and responses will also be posted to the Authority's website at: <https://www.sitesproject.org/>.

Once the RFQ has been publicly released, any communications related to the preparation of an SOQ by a prospective Respondent with any of the Authority Board's members; Reservoir Committee's members; Executive Director, Authority's Agents (including the Authority's External Affairs Manager), Advisors or staff, other than the Contact Person, may result in any ensuing SOQ that was submitted by the prospective Respondent as being deemed not accepted, which will result in the SOQ not being further considered.

4.1 Qualifications Submittal

Receipt of the following material is **required by noon on July 29, 2022** for a Respondent to be considered:

- An electronic copy of the SOQ and all its appendices in a single bookmarked PDF file must be addressed to:
 - Joe Trapasso, Sites Project Authority Program Operations Manager
jtrapasso@sitesproject.org

The qualification information required as part of the SOQ is as follows:

- Transmittal Letter listing RFQ No. 22-03
- Sections: Entire qualifications are limited to no more than 10 pages (page size of 8.5" by 11" and 11-point font minimum, not including transmittal letter, cover page or table of contents, unless otherwise specified)
- Firm Profile and Qualifications
- Experience and Qualifications of Project Team
- Understanding Project Challenges
- Proposed Billing Hourly Rates and Proposed Appraisal Report Fees

Appendices: Will not be counted within the page limit

- Appendix A - Applicable Licenses
- Appendix B - Work Examples
- Appendix C – The Respondent's Standard Services Agreement and any proposed exceptions to the Authority's Addendum A
- Appendix D - Disclosure of Legal Actions, Conflicts of Interest, or other Potential Conflicts

- Appendix E - Key Staff Resumes

4.2 Specific SOQ Information Requirements:

4.2.1 Transmittal Letter

The transmittal letter must not exceed two pages and must be signed by a representative of the Respondent who is authorized to negotiate on behalf of, and to contractually bind, the Respondent during the evaluation. The letter should summarize the key points contained in the qualifications, as well as provide the name, title, address, email address, and telephone number of the Respondent's key contact.

4.2.2 Firm Profile and Key Staff Qualifications

4.2.2.1 Firm Overview

Respondent shall provide narrative description of the proposed valuation team, its members, organizational structure, and the Project Manager who will lead the day-to-day work effort and serve as the primary point of contact. To accompany this narrative description, Respondent shall provide an organizational chart highlighting the key people assigned to accomplish any work that may arise out of this RFQ and identifying the applicable lines of authority within Respondent's Organization. If the firm is selected and a signed contract is executed, any changes to key staff from those identified in the SOQ will require Authority approval.

Specify the office and its address that would serve as the "lead office" for this Project and its primary functions.

4.2.2.2 Key Staff Experience

Respondent shall provide a personnel roster of key members of the proposed valuation team, detailing each individual's title, education, position, professional experience, licensure, credentialing, and proposed role providing services similar to those sought by the Authority.

Provide a brief resume (no more than 2 pages) for the identified Project Manager and key staff. The resumes shall be included in Appendix E to the response to these qualifications and will not be counted in the page limit for the submittal.

4.2.2.3 Firm Experience

Respondent will demonstrate a minimum of five years' experience in the valuation and appraisal of land rights for public acquisition purposes, under the Uniform Relocation Assistance and Real Property Acquisition Act (49 CFR Part 24, as amended) and Uniform Standards of Professional

Appraisal Practice (USPAP). Respondent shall include a list and description of selected appraisal assignments and/or public infrastructure projects substantiating this experience. A demonstrated familiarity and experience with the local project area of the Sacramento Valley is preferred.

For each of the projects/clients listed above, provide the clients' references for which the Respondent has provided services similar to those sought by the Authority. Provide the name, address, telephone number, email address, contact(s) and title(s) of an appropriate individual with each client.

4.2.2.4 Appraisal Report Work Examples

Respondent shall provide up to seven relevant work examples of completed appraisals, preferably valuing similar real estate to the land types identified above; and preferably including examples of:

- appraisal for the purpose of public acquisition;
- appraisal of a partial acquisition;
- appraisal of a partial acquisition, including damage analysis, curative / severance considerations;
- appraisal of an easement valuation

For each experience work example, list the dates services were provided, client/project name, type, whether the Work was part of a public infrastructure project, project budget, and size of project, and the name of Respondent's lead professional on the project. The resumes shall be included in Appendix B to the response to these qualifications and will not be counted in the page limit for the submittal.

4.2.3 Understanding Project Challenges

Provide a summary of the services and the work products that Respondent proposes to provide to the Authority. What specific benefits does Respondent believe they will bring to the Project? How will the Respondent's proposed staffing handle fluctuating needs if multiple assignments are required at the same time?

4.2.4 Proposed Billing Rates

Respondent shall provide proposed hourly rates for Respondent staff and for all proposed subconsultants and subcontractors. The respondent will identify the work that they propose will be billed at an hourly rate.

For work that the Respondent identifies to be completed on a per Appraisal Report Fee, Respondent shall provide the proposed per Appraisal Report Fee by property

type, valuation type, or however is most appropriate to demonstrate Respondent's customary fee structure.

4.2.5 Appendices:

Appendix A: Applicable licenses (refer to Section 3.0)

Appendix B: Work examples (refer to Section 4.2.2.4)

Appendix C: The Respondent's Standard Services Agreement and any proposed exceptions to the Authority's Addendum A (Appendix C)

Appendix D: Disclosure of Legal Actions, Conflicts of Interest, or other Potential Conflicts. Provide information regarding the following in Appendix D:

Any pending investigations of the Respondent, and any enforcement, settlements, or disciplinary actions taken within the past five years by any regulatory body and any litigation challenging the manner in which the Respondent has provided services in the past five years. Any actual or potential conflicts of interest to these qualifications between the Respondent and the Authority, its Board members, its Reservoir Committee members, Project staff, Landowners and any other person or entity.

Appendix E: Key Staff Resumes - Brief resume (no more than 2 pages) for the identified Consultant Project Manager and key staff.

5.0 Agreement Requirements

5.1 Specific SOQ Information Requirements:

The Addendum A (provided as Attachment A to this RFQ) will be required as an attachment to the Respondent's standard agreement. Where applicable, the terms and conditions of Addendum A will supersede the terms and conditions of the Respondent's standard agreement. If the firm is selected and a signed contract is executed, work scope, budget, and schedule will be linked to the Agreement by Task Order. The Authority is anticipating that the Respondent's standard agreement form will be used, with the only change being the addition of language tying the agreement to the required Addendum A.

Confirm your concurrence with the application of the Addendum A terms and conditions shown in **Attachment A** for this work within your SOQ.

The Authority is planning the execution of contracts with the selected firms with a term expected to commence on or about September 1, 2022. The Authority will determine the term of the contract, in its sole discretion, at the time of the negotiation of the contract with the selected Respondent. The contract shall state the conditions under which the contract can be terminated, including termination for convenience by the Authority upon 30 days' notice.

The Authority reserves the sole right to not execute a task order and to terminate the

agreement before its completion pending 30-day written notice.

The Respondent shall defend, indemnify, and hold harmless the Authority, Reservoir Committee and their respective directors, members, officers, employees and agents from any claim or liability related to or arising from the services provided for under the contract, except to the extent caused solely by the gross negligence or willful misconduct of the Authority, Reservoir Committee and their respective directors, members, officers, employees and agents.

The Respondent shall identify the nature and extent of insurance policies that it has and will keep in place during the term of the contract, including general liability, workers compensation, automobile liability and professional liability.

6.0 Evaluation and Selection Procedure

An evaluation team comprised of Authority Project staff will evaluate each submitted SOQ relative to the completeness of the submitted qualifications and the criteria listed below and provide the information to an Authority Selection Committee consisting of Authority Executive Director and Agent(s), and potential technical advisor(s).

The Selection Committee will identify the best qualified firm(s) and negotiations of a contract(s) will be initiated. Please be aware that the Authority requires adherence to the terms and conditions to the Addendum A Agreement that will be link to the Respondent's Standard Services Agreement. Please ensure if you have any exceptions to the Addendum A Agreement that they are noted in your SOQ. If acceptable terms and conditions with the selected firm(s) cannot be reached in a timely manner, a signed contract will not be issued to the Respondent in question.

It is the plan of the Authority to have a list of approved and contracted Real Estate Appraisal firms. The Selection Committee will then proceed to make a recommendation to the Reservoir Committee and Authority Board to approve and execute the negotiated contracts.

The Authority reserves the right to select Respondent(s) which in its sole judgment best meets the needs of the Authority.

The Authority will evaluate qualifications submittals based on the below listed criteria with equal weightings among the criteria (note that there is no value or ranking implied in the order of this list):

- Demonstrated ability to perform the services described;
- Experience, qualifications and expertise;
- Quality of work as verified by work examples;
- Rates relative to the scope of services;
- A demonstrated history of providing similar services for public agencies;
- Any other factors the Authority deems relevant; and
- The locality of the Responder.

The firms selected and contracted for the on-call list will not be entitled to any minimum number of Task Orders while the on-call list is in effect.

7.0 Tentative Qualifications Schedule

Statement of Qualifications are due on July 29, 2022 at noon, PST. Statement of Qualifications received after this time will not be accepted. In addition, after receipt of a respondent's Statement of Qualifications, no additional version of the Respondent's Statement of Qualifications will be accepted.

RFQ Contact Person

Joe Trapasso
Program Operations Manager
Sites Reservoir Project
jtrapasso@sitesproject.org

Tentative Solicitation Schedule (subject to change)

Activity	Date (2022)
Release of RFQ and posting to Sites website	July 8
Submission of written RFQ questions	July 15
Response to written questions emailed to Respondents and posted to Sites website	July 20
Qualifications due to Authority	July 29
Authority Review of Qualifications/Firms	July 30
Authority Board meeting approves award of agreements	Aug 24
Execution of contract completed	Sept 1

8.0 Solicitation Disclaimer

The Authority reserves the right to reject any and/or all responses, negotiate with any Respondent that submits a response, or waive any informality or irregularity. All responses to this RFQ become the property of the Authority upon submission. The costs of preparing the Statement of Qualifications is at the sole expense of the Respondent.

9.0 Additional Information

For more information on the recently completed Value Planning Report and the Sites JPA, please visit: <https://www.sitesproject.org/>



EXHIBIT A
Sites Project Authority
Real Estate Appraisal Services
Task Order No. __

Consultant: *[Consultant Firm Name]* referred to as “CONSULTANT”

Task Order No. __

Task Order No. __ specifies work activities comprising the Services to be performed by CONSULTANT pursuant to the Consulting Services Agreement (Agreement) for Real Estate Appraisal Services effective on *[Date]*.

Scope of Services

CONSULTANT’s scope of Services which includes tasks, deliverables, assumptions, and schedule is provided in Attachment 1 to this Task Order.

Budget

CONSULTANT’s Budget summary table is provided in Attachment 2 to this Task Order, which outlines amounts allocated by task, and if required, subtask. The total not-to-exceed Budget amount for this Task Order is \$_____.

Schedule

The scope of Services defined herein shall begin not more than _____ calendar days after the Authority receives the signed copy of this Task Order No. __ from the Consultant. The estimated time for completion is within ____ calendar days thereafter.

This Task Order is hereby executed by duly authorized representatives of the parties.

CONSULTANT

AUTHORITY

By: _____

By: _____

Printed Name: _____

Printed Name: _____

Date: _____

Date: _____



EXHIBIT B
Sites Project Authority
Real Estate Appraisal Services
Task Order Amendment No. _ To
Task Order No. _

Consultant: [Firm Name] referred to as "CONSULTANT"

Task Order Amendment No. __ to Task Order No. __, dated [Date], is agreed to by the Authority and the CONSULTANT to amend Task Order __, as amended from time to time, as follows:

Scope of Services

The CONSULTANT's scope of Services in Task Order __, including tasks, deliverables, assumptions and schedule, is amended as described in Attachment 1 hereto.

Schedule

CONSULTANT is authorized to proceed with any modification set forth in the amendment effective on the date of this executed Task Order Amendment.

If Agreement Schedule is amended, the schedule for Task Order __ Amendment __ activities is as follows:

Effective Date:

Modified End Date:

Budget

Compensation for the Services of this Task Order Amendment shall be calculated on the same basis as in the Task Order __, as amended. The basis of fee for completing the Services defined in this Task Order Amendment is shown in Attachment 2 hereto. The compensation for the Services performed under this Task Order Amendment is \$_____. The total not-to-exceed Budget amount for this Task Order, pursuant to this Task Order Amendment is \$_____.

The following budget adjustments have been made to this Task Order Amendment:

Changes to Tasks and Subtasks

Subject Area	Task and Subtask			Subtask Budget		
	New	ID	Subtask Name	Previous	Change	Revised
[Subject Area]	<input type="checkbox"/>	[X##.##]	XXXXX	[\$##,###]	[\$##,###]	[\$##,###]
[Subject Area]	<input type="checkbox"/>	[X##.##]	XXXXX	[\$##,###]	[\$##,###]	[\$##,###]

Task Order Amendment Total \$##,###



Except as expressly provided for in this Task Order Amendment, all terms and conditions of the Agreement and any other Task Order associated therewith, and any amendments thereto remain unchanged.

This Task Order No. __, Amendment No. __ is hereby executed by duly authorized representatives of the parties.

CONSULTANT

By: _____

Printed Name: _____

Date: _____

AUTHORITY

By: _____

Printed Name: _____

Date: _____

AUTHORITY (Executive Director*)

By: _____

Printed Name: _____

Date: _____

**Executive Director authorization required as needed, in accordance with the Budget Policy and Delegation of Authority.*