



REQUEST FOR PROPOSAL
For
REAL ESTATE APPRAISAL SERVICES

RFP Release Date
December 19, 2019

Proposal Submittal Deadline
January 29, 2020
4:00 p.m.

Questions with regard to submissions,
process, or proposals can be emailed to:

Astrida Trupovnieks
Business Development Manager
atrupovnieks@lodi.gov

REQUEST FOR PROPOSALS
for
REAL ESTATE APPRAISAL SERVICES

NOTICE IS HEREBY GIVEN that the City of Lodi (“City”) is issuing this Request for Proposals (“RFP”) for real estate appraisal services on **three (3)** properties located in the City of Lodi.

Firms are solely responsible for ensuring proposals are received by the City on or before the submittal deadline. **Proposals must be received no later than 4:00 p.m., on Thursday, January 29, 2020 at the following address:**

City of Lodi
221 W Pine Street
P.O. Box 3006
Lodi, California 95241-1910
Attn: Astrida Trupovnieks, MA, MBA
Business Development Manager

An original copy must be signed by a representative authorized to bind the company. Proposals submitted by email are not acceptable, and will not be considered. **The original signed submission with the name of the firm and RFP title proposal is to be submitted in a sealed package with the name of the firm and RFP title “Real Estate Appraisal Services” must be clearly marked on the outside of the package.**

Proposals cannot be changed or withdrawn after the submittal deadline. No handwritten notations or corrections will be allowed. The responding firm is solely responsible for all costs related to the preparation of the proposal.

The City reserves the right to reject all proposals and to waive any minor informalities or irregularities contained in any proposal. Acceptance of any proposal submitted pursuant to this RFP shall not constitute any implied intent to enter into a contract.

The contract award, if any, will be made to the firm who, in the City’s sole discretion, is best able to perform the required services in a manner most beneficial to the City.

Introduction

The City of Lodi is accepting Proposals for a qualified professional appraiser to conduct appraisals of **four** (4) sites located within the city.

The Properties include:

- **2630 S. Stockton Street (subdivided into ten parcels);**
- **22 E. Locust Street; and**
- **275 Culbertson Drive located at the intersection of Culbertson Drive and Voyager Drive**
- **219 S. School Street**

An aerial view and parcel information is found in Attachment 1.

Materials submitted by respondents may be subject to public inspection under the Brown Act.

The selected appraiser must be an MAI appraiser. The selected MAI appraiser will not be functioning as an agent for the client or any other related parties. The selected appraiser will not be required to report a predetermined value, or direct a value that may favor the city or any related parties.

The respondents are encouraged to access public documents on file in the Community Development Department which relate to the properties.

During the evaluation process, the City of Lodi reserves the right, where it may serve the City's best interest, to request additional information or clarification from proposers, or to allow corrections of errors or omissions.

The City reserves the right to retain all proposals submitted and to use any idea(s) in a proposal regardless of whether that proposal is selected. Submission of a proposal indicates acceptance by the firm of the conditions contained in the request for proposals, unless clearly and specifically noted in the proposal submitted and confirmed in the contract between the City of Lodi and the firm selected.

It is anticipated the selection of an appraisal firm will be completed within one (1) week of the submittal of proposals. Following the notification of the selected firm, a recommendation and standard contract will be prepared for review and approval by the City Manager. The City reserves the right to reject any or all proposals, to waive any non-material irregularities or information in any proposal, and to accept or reject any items or combination of items.

Proposals must be responsive to City's request. The City shall determine the most responsive and qualified appraiser providing the best service at the most reasonable cost. Cost alone shall not be the determinative factor.

The request for proposals does not obligate the City to award a contract or complete the project and the City reserves the right to cancel the solicitation if deemed in its best interest.

Scope of Services

Overview

To aid in the consummation of a sale as of a specified date the city must obtain an accurate market value for the subject properties it owns. In the scope of this assignment, the appraiser must:

Identify and explain the chosen method of the appraisal of vacant land taking into consideration location, zoning, topography, access, public improvements and all other factors
Inspect and photograph the property being appraised;
Secure and evaluate information relating to land characteristics, zoning, access, utilities which the City will make available;
Study area land uses, demographics, and market supply-demand characteristics;
Research recent and similar property sales and rents, and land sales within the appropriate market area;
Form an opinion of the highest and best use for the appraised property;
Interview persons considered informed regarding the subject and similar properties, including various real estate professionals, and representatives of the City of Lodi; and
Develop an opinion of market value using appropriate appraisal methodology with reporting of the appraisal results in an Appraisal Report, as specified in USPAP.

Deliverables

Two complete copies of the separate Appraisal Report for each site listed above in hard copy form, and a flash drive with the separate electronic Appraisal Reports.

Project Schedule

The City will not give verbal answers to clarifications regarding information in this RFP, or verbal instructions prior to the submission deadline. All clarifications shall be submitted in writing. A verbal statement regarding same by any person shall be non-binding. The City is not liable for any increased costs resulting from the firm accepting verbal directions. Any explanation or clarification desired by a respondent must be requested of the City representative in writing no later than **January 2, 2020 at 4 p.m.**

Below is a desired schedule for initiation of this project; however dates may be subject to change and adjusted as necessary.

RFP Issued	December 19, 2019
Deadline for submitting questions by email	January 2, 2019
Responses to Written Questions	January 9, 2020
Proposal Submittal Deadline	January 29, 2020 at 4:00 p.m.

Contract award (no later than)

As soon as practical after City
Council approval, as necessary

Inquiries concerning the Request for Proposals and the subject of the Request
for Proposals must be made to:

Astrida Trupovnieks, MA, MBA

Business Development Manager - atrupovnieks@lodi.gov

Submission of Proposal

Proposals submitted by fax or email are not acceptable and will not be considered. An original signed proposal is to be submitted in sealed package with the name of the Appraisal firm, RFP title “Real Estate Appraisal Services.

The Proposal shall be received by the City of Lodi **by 4:00 p.m. on Thursday, January 29, 2020** for a proposal to be considered. The Proposal should address the items listed below and sent to:

**City of Lodi
Economic Development Office
221 W. Pine Street
P.O. Box 3006
Lodi, CA 95241**

Proposal Content

The Appraisal firm shall be responsible for preparing an effective, clear, and concise proposal. The firm shall submit one (1) original signed proposal, and two copies. The proposal shall be word-processed and must contain no more than 10 typed pages for each location. The conflict of interest statement, comments on or requested changes to contract, work schedule, and staff availability sections are not counted toward the 10 page limitation when inserted at the end of the proposal. The following information shall be included:

1. Letter of Interest: Please include a letter expressing the appraisal firm’s interest in being considered for the project. Include a statement regarding the firm’s availability to dedicate time, personnel, and resources to this effort. The letter of interest must include a commitment to the availability of the Appraiser and all key project staff to provide specified services. .
2. Project Understanding and Approach: Please include a statement demonstrating your understanding of the proposed project. Describe your approach to completing the project successfully; methodologies and technologies you would employ; and processes you would employ. Describe what information you would expect the City to supply.
3. Relevant Experience: Please include information describing the Appraiser’s experience.
4. Project Manager: Please provide documentation of a current commercial appraisal license suitable for the scope of the project.

5. Conflict of Interest Statement: The firm shall disclose any financial, business, or other relationship with the City that may have an impact upon the outcome of this contract.
6. Comments on or Requested Changes to Contract: The City standard professional services agreement is included as Attachment 3 to this Request for Proposals. The proposing firm shall identify any objections to and/or request changes to the standard contract language in this section
7. Work Schedule: Provide a realistic proposed schedule designed to meet the City's objectives with key deliverables, and tasks, including dates for completion of the final reports. **Project shall be completed no later than March 31, 2020.**
8. Cost Proposal: The proposal shall include:
 - a. Total All-Inclusive Not To Exceed Maximum Price: The cost proposal should contain all pricing information relative to performing the scope of work as described in this request for proposals. The total all-inclusive maximum not to exceed price is to contain all direct and indirect costs including all out-of-pocket expenses. In addition, the cost proposal must provide pricing information detail for each location. The respondent will not be able to exclude any of the three properties from the proposal. The proposed budget should be inclusive of all meetings, conference calls, site visits and deliverables.
 - b. Manner of Payment: Payment will be made within 30 days of the delivery of the appraisals. Project proposal may include unit pricing for each appraisal and reimbursements will be made on that basis.

Format for Proposal

To facilitate the review of responses, all responses are required to adhere to the following requirements with regard to their proposal. The City strongly encourages respondents to ensure that RFP submissions are succinct and clearly organized. If the proposal is not in this format or does not include all of the listed items, it may be deemed non responsive. For ease of handling, all responses are to be provided in a standard 8 ½" x 11" portrait format with binding on the left hand edge.

1. Title Page showing the request for proposals subject; the firm's name; the name, address and telephone number of the contact person; and the date of the proposal.
2. Table of Contents identifying the materials submitted by section and page number.
3. Detailed Proposal following the order set forth in the Proposal Content.

Criteria for Selection

Proposals will be reviewed by City staff and evaluated to determine which proposals best meet the criteria of the RFP. Evaluation of the proposals by staff is expected to be completed within seven days following the proposal submittal deadline.

The City reserves the right, without qualification, to:

1. Reject all proposals.
2. Exercise discretion and apply its judgment with respect to any proposal submitted.
3. Select proposals which qualify on the following factors:
 - a. Project understanding and approach
 - b. Relevant experience
 - c. Scope of Services
4. Cost

A recommendation for firm selection will be made to the City Manager based on Staff's "best value" evaluation of the proposals/qualifications, which will take into account the appraiser's qualifications, comparable experience, availability to undertake the project, complete the tasks timely, deliver a high-quality work product, and the ability to comply with the City's standard professional services agreement, and insurance requirements.

All interested parties are encouraged to submit proposals to the RFP. Total cost will be taken into consideration, but a firm's capabilities, competence and capacity will be considered as well. The City reserves the right to choose the overall best response according to the City's criteria. The City, and its designated representatives, shall be the sole judge of its own best interest, the proposal, and the resulting negotiated agreement. The City's decision will be final.

The above factors, along with other factors that the City may deem appropriate, will be used to identify the proposal that represents the best value, which will be the basis for the contract award. The decision of whether to award a contract and selection of a Firm will be in the sole discretion of the City Manager or City Council.

Special Conditions

Contract and Insurance Requirements

The selected firm shall be required to enter into a city-prepared Professional Services Agreement approved by the City Manager. Appraisers shall be prepared to accept the terms and conditions of the City's Standard Professional Services Agreement including all Insurance Requirements. The successful Appraisal bid and the terms and conditions stated in this RFP will be made part of the contract between the City of Lodi and the Appraisal firm. This RFP outlines the specifications and requirements, but not necessarily all of the terms and conditions that will be incorporated into the final agreement between the City of Lodi and the successful appraisal firm.

The City's insurance requirements are attached in Attachment 2.

Firm shall disclose to the City and maintain coverage amounts for General Liability, Workers Compensation, Auto Liability and Professional Liability in amounts typical of Commercial Appraisal professionals in the State of Maine.

Reservations.

This RFP does not commit the City to award a contract, to defray any costs incurred in the preparation of a proposal pursuant to this RFP, or to procure or contract for work. No payment of any kind will be provided to the Appraisal firm responding to this RFP, or parties they represent, for obtaining any of the information solicited.

Public Records.

All proposals submitted in response to this RFP become the property of the City. Information in the proposal, unless specified as trade protected, may be subject to public review. Any information contained in the proposal that is proprietary must be clearly designated. Marking the entire proposal as proprietary will be neither accepted nor honored. Proprietary information submitted in response to this RFP will be handled in accordance with the California Brown Act.

Right to Cancel and Amend.

The City reserves the right to cancel, for any or no reason, in part or in its entirety, this RFP, including but not limited to: selection schedule, submittal date, and submittal requirements. If the City cancels or revises the RFP, all Appraisal firms will be notified in writing.

Additional Information.

The City reserves the right to request additional information and/or clarification from any or all Appraisers.

Conflict of Interest.

The appraisal firm covenants that the company, its officers, employees and/or agents presently have no interest, and shall not acquire any interest, direct or indirect, financial or otherwise, which would conflict in any manner or degree with the performance of the services requested herein by the City. The firm further covenants that, in the performance of any contract or agreement resulting from this RFP, no subcontractor or person having such an interest shall be employed. The firm certifies that to the best of their knowledge, no one who has or will have any financial interest under any contract or agreement resulting from this RFP is an officer or employee of the City.

Release of Public Information.

Firms who respond to this RFP who wish to release information to the public regarding selection, contract award or data provided by the City must receive prior written approval from the City before disclosing such information to the public.

Non-Assignment.

If a contract is awarded, the selected firm shall neither assign, nor delegate, in part or in whole, any duties without the prior written consent of the City which shall not be unreasonably withheld.

Collusion.

Each Appraiser certifies that the company, its officers, employees and/or agents are not a party to any collusive action, fraud, or any action that may be in violation of the Sherman Antitrust Act. The firm certifies that the company, its officers, employees and/or agents have not offered or received any kickbacks or inducements from any other bidding Firm, supplier, manufacturer, or subcontractor in connection with the proposal . . . and that the company, its officers,

employees and/or agents 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. Any or all bids shall be rejected if there is any reason to believe collusion exists among the bidding Firms. More than one bid from an individual, firm, partnership, corporation, or association under the same or different names may be rejected. Reasonable grounds for believing that a bidding Firm has interest in more than one proposal for the work being proposed may result in rejection of all bids in which the bidding Firm is believed to have interest.

Equal Employment Opportunity Compliance.

The selected Appraiser shall not discriminate against any employee or applicant for employment because of race, creed, color, or national origin. The Appraiser shall take affirmative action to ensure that all employees and applicants for employment shall be treated with equality in all aspects of employment processes including, but not limited to, hiring, transfer, promotion, training, compensation and termination, regardless of their race, creed, color, sex, national origin, age, or physical handicap.

Right to Audit.

The selected Appraisal firm shall maintain such financial records and other records as may be prescribed by the City or by applicable federal and state laws, rules, and regulations. The selected firm shall retain these records for a period of three years after final payment, or until they are audited by the City, whichever event occurs first. These records shall be made available during the term of the contract or service agreement and the subsequent three year period for examination, transcription, and audit by the City or its designees.

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