

Request for Qualifications

Right of Way

Real Estate Appraisal Services

on MOVEBR Projects

for

City of Baton Rouge and

Parish of East Baton Rouge

Department of Transportation and Drainage

(Revised 10/3/19)

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PUBLIC NOTICE

**RIGHT OF WAY APPRAISAL SERVICES
ON MOVEBR PROJECTS**

The City of Baton Rouge and Parish of East Baton Rouge (City-Parish) invites qualified firms or individuals to submit a Statement of Qualifications for Real Estate Appraisal Services for the acquisition of right of way on MOVEBR projects.

The City-Parish desires to hire qualified Real Estate Appraisers (Appraisers) to provide Right of Way Appraisal Services under a general retainer contract for projects included in the 2018 Half-Cent Sales Tax Initiative, known as "MOVEBR". The Consultant will be required to coordinate closely with the MOVEBR Program Manager, the City-Parish Department of Transportation and Drainage, and the City-Parish Attorney's Office on individual projects during the acquisition phase of the projects.

The MOVEBR Program Manager, in consultation with the City-Parish Department of Transportation and Drainage, will assign parcels to the selected Appraiser(s) on an as needed basis, based upon each Appraiser(s) ability to complete the work on schedule and the quality of the services performed, as determined by the City-Parish Department of Transportation and Drainage. The City-Parish does not guarantee a minimum number of parcels, nor a minimum dollar amount of fees, to be generated by this contract.

It is the intent of the City-Parish that the Appraiser(s) selected for this program will have the necessary expertise to effectively estimate the values of rights of way and easements/servitudes for MOVEBR projects while ensuring that all applicable federal, state and local rules and policies are followed.

Statement of Qualifications shall only be submitted on the provided form (MOVEBR ROW Request for Qualifications for Appraisal Services Standard Form 1A). Interested firms shall obtain an official Request for Qualifications (RFQ) package from Mr. Joseph Earls, Right of Way Manager, CSRS, Inc., 6767 Perkins Road, Suite 200, Baton Rouge, Louisiana 70808, direct line (225) 831-2176, fax (225) 769-0546.

Any questions regarding this request for qualifications may be addressed in writing or via e-mail to Mr. Joseph Earls, SR/WA, RW-EC, MOVEBR Right of Way Manager, CSRS, Inc., 6767 Perkins Road, Suite 200, Baton Rouge, Louisiana 70808, fax number (225) 769-0546, joseph.earls@csarsinc.com.

PROJECT OBJECTIVE:

1.0 General:

The purpose of this project is to acquire real property and easements necessary for the construction of MOVEBR projects for the City of Baton Rouge and Parish of East Baton Rouge (City-Parish) Department of Transportation and Drainage.

2.0 Program Scope:

The City-Parish desires to hire qualified Real Estate Appraisers (Appraisers) to provide Right of Way Appraisal Services under a general retainer contract for projects included in the 2018 Half-Cent Sales Tax Initiative, known as “MOVEBR”. The MOVEBR Plan consists of approximately 50 road projects, the majority of which will require the acquisition of real property and easements/servitudes. It is estimated that it will be necessary to acquire approximately 1300 parcels over the life of the program. The Appraiser will be required to coordinate closely with the MOVEBR Program Manager, the City-Parish Department of Transportation and Drainage, and the City-Parish Attorney’s Office on individual projects during the acquisition phase of the projects.

In order to establish a fair process and assignment of work, it is the intent of the City-Parish to utilize as many qualified Appraisers as practical. The MOVEBR Program Manager, in consultation with the City-Parish Department of Transportation and Drainage, will assign parcels to the selected Appraiser(s) on an as needed basis, based upon each Appraiser(s) ability to complete the work on schedule and the quality of the services performed, as determined by the City-Parish Department of Transportation and Drainage.

The City-Parish does not guarantee a minimum number of assigned parcels, nor a minimum dollar amount of fees to be generated by this contract. The number of parcels assigned to each Appraiser is at the discretion of the City-Parish Department of Transportation and Drainage. If more than one Appraiser is used, the number of parcels assigned to each Appraiser may not be equal.

For MOVEBR projects that are on State Routes, preference may be given to those Appraisers with LaDOTD Right of Way experience. A State of Louisiana General Appraisal Certification will also be preferred.

3.0 Program Tasks:

Through a cooperative effort with the City-Parish Department of Transportation and Drainage, the Parish Attorney’s Office, and the MOVEBR Program Manager, the selected Appraiser(s) will estimate the value of real property rights and interests as well as easements/servitudes under the following requirements:

Compliance: All Appraisal Services are to be performed in consideration of current editions of:

- a. The Uniform Acquisition and Relocation Assistance and Real Property Act of 1970, as amended
<http://www.fhwa.dot.gov/realestate/act.htm>
- b. The Federal Regulations in 49 C.F.R Part 24, as amended:
<http://www.fhwa.dot.gov/realestate/49cfr.htm>
- c. All State Regulations, specifically Title 19 & 48 of LA Revised Statutes:
<http://www.legis.state.la.us/lss/lss.asp?folder=75>
- d. Any City-Parish authorized guidelines

4.0 Appraisal Requirements:

The Appraisal Services shall be to advise the City-Parish of the Appraiser's supported opinion of value of the real estate related just compensation due under Louisiana eminent domain law (as defined by the Parish Attorney) of each parcel. The general scope of work for Real Estate Appraisal will be to estimate the value of the assigned parcels on behalf of the City-Parish. Details concerning the scope of work are as follows:

A personal inspection of each parcel, including all improvements, structures, appurtenances, or other elements of value thereon. The inspection shall be as detailed as necessary for reliable analysis. Exterior inspections and photographs of all comparable property data are required. For vacant land comparables, a descriptive plat or survey is adequate depiction. Items in the ROW at each parcel must be photographed descriptively.

- b. An "as is" value, free and clear of substantial detrimental conditions (contamination, etc.).
- c. A written report submitted as one digital copy (in PDF format) including, at minimum, the following items for each parcel valued:
 - i. A detailed market conditions and neighborhood analysis, including concluded value influences;
 - ii. The names and addresses of the owner(s) and the date and place of recording the instrument under which the owner(s) claim title;
 - iii. An analysis of relevant details of all recent (no less than the past 5 years) sales;
 - iv. The property rights owned, identifying the various interests (if any), as well as the rights sought;
 - v. The assessed value and the amount of the current ad valorem tax assessment, and the characteristics and value effects of special assessments (if any);
 - vi. A supported opinion of the defined value, including improvements, structures, appurtenances, and any other property elements. In the event that the parcel is improved, the dimensions, kind, character and condition of each structure, improvement, or fixture onsite, as well as physical and effective age and remaining economic life, must be stated. A supported opinion of the property's highest and best use both as if vacant and

improved is necessary. In cases of an improved parcel subject to a partial taking, a detailed discussion of the present use as well as the highest and best use, in both before and after status, is required. For multi-use tracts, highest and best use analysis is required for each use;

- vii. Comprehensively descriptive photographs of the property (interiors and exteriors);
- viii. All unusual or unlawful conditions or circumstances found with regard to status, use, or occupancy. **At the discovery of such circumstances or conditions, the Appraiser must notify the City-Parish contact person immediately;**
- ix. A scaled diagram of all affected improvements in a form typical of industry standards, and descriptive reasoning regards classification of unaffected onsite improvements;
- x. An analysis of all rental, cost, and sales data taken into consideration in estimating the defined value. The description of comparable properties shall indicate all relevant property characteristics; names and phone numbers of the verification source; the terms and conditions of sale; date of transfer; place of recording of the conveyance; and map and diagram or other information indicating the location of such sales in relation to the subject property. **The City-Parish expects a high level of due diligence in research data used for estimating forecasted uses and values.** The geographic extent of such research should be consistent with the market in which the subject property would compete;
- xi. In the event the possibility of severance damages exists, contributing values of the part taken, the remainder after the taking and the whole property before the taking must be included. The value of any special benefits accruing to the remainder after the taking must be considered. Where an allocation is made for severance damages or a cost to cure estimate is included, a full explanation of the reasons for such an allocation must be given;
- xii. Any rental value and the history of the rental experience, if applicable to the defined value;
- xiii. A review of existing utilities and the adequacy thereof with respect to services available;
- xiv. A brief description of the access, as well as street improvements proximate to the site and the general vicinity, in before and after status;
- xv. A scope of work, per USPAP;
- xvi. The intended use as well as intended user;
- xvii. The date of value and the date of the report.
- xviii. In every appraisal the value, and method of estimating same, of the land use parcel,
as if vacant, must be included

d. Appraiser is to assist and advise the City-Parish in the event of expropriation by critiquing the property owner's expert appraisals, assist in preparation for trial, respond to any necessary pre-trial discovery, including answering opponent's interrogatories, and participate in depositions of others or other legal proceedings prior to and including trial.

5.0 Appraisal Acceptability

- a. Each Appraiser is charged with reviewing the preliminary scope of work and contract requirements. If he or she believes other work efforts or analysis are required, he or she must request that the scope of work be revised. In determining whether the proposed scope of work is acceptable, the Appraiser must ensure that it would meet or exceed:
 - i. Regularly intended users' reasonable expectations for similar assignments, and
 - ii. A reasonable peer's actions in performing the same or similar assignment in the same or similar circumstances.
- b. Should information obtained during the course of the assignment suggest that the scope of work needs to be revised to produce credible results, the Appraiser shall immediately communicate to the City-Parish contact person all information required to make a determination as to any revisions.

6.0 Project Manual

Unless specifically exempted by the City-Parish, a Project Manual shall be submitted either individually or, in the event of two (2) Appraisers, in concert. The manual is to include, at a minimum, for the project:

- a. General market data, status, analysis and values of the project area; (brevity is requested)
- b. Immediate market/neighborhood data, status, analysis and value-related conclusions;
- c. Relevant zoning regulations and their effects on value; (do not place the entire UDC in the manual!)
- d. General project description and physical specifications;
- e. Flood status/FEMA maps;
- f. Comprehensive verified (cite source and contact phone) comparable data, photography, and maps;
- g. Definitions (current) utilized and sources cited;
- h. Current DOT reporting formats described;
- i. Relevant General Assumptions and Limiting Conditions to project values;
- j. General Certification of the Appraiser;

- k. Résumé of Appraiser;
- l. General ROW remainder maps;
- m. Vicinity map of project;
- n. Contract with City-Parish;

NOTE: Individual parcel appraisal reports are to reference this Project Manual data rather than repeat these generalized topics. An initial copy of this Manual is due 60 calendar days from specific written notice to proceed.

7.0 Appraisal Services Contract Dynamics

All Appraisal Services are subject to the following management plan:

- a. Owner interactions and documented communications. A typical notice letter is to precede the initial property visit. Owner failure to respond requires written DPW authorization for the appraiser to “best effort” visit the properties. A visit sheet, in the supplied format, is to be completed and sent to the Right of Way Manager within 24 hours of actual onsite viewing of the property by the appraiser.
- b. Parcel and inspection sequencing. There is specific sequencing on this project. The sequencing will be as directed in writing by the CSRS Right of Way Manager. The instruction is subject to changes authorized in writing by City-Parish.
- c. Information feedback channel. The visit sheet is very important. Also, any relevant information gleaned by the appraiser (or the City-Parish) will immediately be communicated to the parties in order to provide timely efficient functioning
- d. The use of consistent and/or standardized reporting guides and forms as provided prior to the initiation of appraisal services
- e. The Appraiser must certify familiarity and compliance with current Louisiana DOT appraisal requirements, including Section 3 of the Louisiana Real Estate Manual as an express condition and requirement of any Contract. Such certification is to be prominently presented in the submitted appraisals.
- f. The appraiser agrees to execute donation documents (if any) based upon the values contained within his or her submitted appraisal report.
- g. Upon written notice from the Right of Way Manager, Appraiser agrees to proceed with all professional services necessary for the performance of Appraisal Services in proper sequence and in the time specified, and as set forth. All of the Appraisal Services will be performed by Appraiser or under its supervision, and all personnel engaged in the work shall be fully qualified, authorized or licensed under state and local law to perform such services, and shall be covered by Appraiser’s professional liability coverage.

h. The Appraisal Services shall be to advise the City-Parish of the Appraiser's supported opinion of value of the real estate related just compensation due under Louisiana eminent domain law (as defined by the Parish Attorney) of each parcel. Appraiser shall submit one electronic (pdf) copy of each appraisal it is authorized to perform. The City-Parish, may, from time to time, request changes in the scope of the Appraisal Services. Such changes, including any increase or decrease in the amount of the Appraiser's compensation which are mutually agreed upon by the City Parish and Appraiser shall be incorporated in written amendments to the Contract and may be, if the parties agree, reflected on a Schedule, which shall constitute the amendment.

i. With the exception of the data specifically listed to be furnished by the City Parish, Appraiser shall, for the agreed fees, obtain all data and furnish all services and materials required to fully develop and complete the Appraisal Services. All items required to accomplish these results, including correction of any defective work, are to be furnished at the expense of Appraiser.

j. Items to be provided by City-Parish:

1. Abstracts and plats
2. Ownership data
 - i. Names
 - ii. Addresses of record
3. Right of Way maps
4. Basic construction specifications

8.0 Technical Expertise Required:

The following requirements must be met at the time of submittal:

Any person that will be acting on behalf of the City-Parish for the purposes of real estate appraisal must have at least three (3) years of relevant experience in right of way real estate appraisal and holds a State of Louisiana General Appraisal Certification. A Residential Certification may also be considered.

C. STATEMENT OF QUALIFICATIONS:

1.0

Definitions:

"Principals" are those individuals in a firm who possess legal responsibility for its management. They may be owners, partners, corporate officers, associates, administrators, etc.

“Consultant” is a highly specialized individual or firm having significant input and responsibility for certain aspects of a project and possessing unusual or unique capabilities for assuring success of the finished work.

“Key Persons/Key Personnel” refer to individuals or firms who will have major responsibility or will provide unusual or unique capabilities for the task under consideration.

General:

The Statement of Qualifications (SOQ) shall be submitted in the attached SF 1A format as to address the qualifications of the Consultant(s) to provide the services requested. The SOQ SF 1A should include the identification of the Consultant(s) background, experience, education, and other qualifications.

Additionally, the SOQ SF 1A shall also include résumé’s showing qualifications and experience of Key Persons, including references to former clients for whom comparable work has been undertaken.

Proposers may also include other appropriate information; however, the Statement of Qualifications SF 1A should be prepared simply and economically, providing a straightforward and concise description of the proposer’s ability to meet the requirements of the project. Emphasis should be placed on completeness and clarity of content. Fancy bindings, elaborate displays, or other promotional material are neither required nor desired.

To assist in evaluating qualifications, interviews may be conducted at the discretion of the MOVEBR Right of Way Selection Committee.

The City-Parish shall not be liable for any cost incurred by the respondent in the preparation of their Statement of Qualifications SF 1A in response to this Request For Qualifications.

2.0 Submission of Statement of Qualifications on SF 1A:

The Appraiser shall submit the Statement of Qualifications SF 1A via e-mail to:

Mr. Joseph Earls, SR/WA, RW-EC
MOVEBR Right of Way Manager
CSRS, Inc.
6767 Perkins Road, Suite 200
Baton Rouge, Louisiana 70808
Phone direct line (225) 831-2176
fax (225) 769-0546
e-mail: joseph.earls@csrsinc.com.

This is an on-going request for qualifications. There is no deadline to submit qualifications; however, assignments for the initial projects may be made as early as November 2019. Only those Consultants that have submitted qualifications will be considered for work.

The MOVEBR Right of Way Work Group reserves the right to reject any and all proposals and waive informalities in order to obtain the most favorable proposal for the City-Parish. Additionally, failure to submit all of the requested information may result in the submitted SOQ SF 1A to be considered non-responsive.

Any questions regarding this request for qualifications may be addressed in writing or via e-mail to Mr. Joseph Earls, SR/WA, RW-EC, MOVEBR Right of Way Manager, 6767 Perkins Road, Suite 200, Baton Rouge, Louisiana 70808, fax number (225) 769-0546, joseph.earls@csrsinc.com.

3.0 Selection Process:

The MOVEBR Right of Way Work Group will review all responses received. Proposals will not be ranked or scored. Instead, Consultants will be engaged on an as needed basis throughout the program based upon the qualifications, current workload and capacity, complexity of the work, and the quality of work completed to date.