

October 19, 2016



Spokane Public Schools
excellence for everyone

Request for Qualifications No. 12-1617 Professional Property Appraisal Services

Submittal Deadline: November 10, 2016 4:00 P.M. P.S.T.

**Spokane Public Schools
Purchasing Services
2815 E Garland Avenue
Spokane WA 99207
(509) 354-7174**

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Purchasing Department
2815 East Garland Avenue
Spokane, WA 99207-5889

phone (509) 354-7174
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www.spokaneschools.org



October 19, 2016

**LEGAL NOTICE
SPOKANE PUBLIC SCHOOLS**

Professional Property Appraisal Services

REQUEST QUALIFICATIONS NO. 12-1617

Spokane Public Schools is requesting sealed submittals from qualified Real Estate Appraisal Firms interested in providing professional property appraisal services for Spokane Public Schools.

Interested firms shall contact the District's Purchasing Services office to obtain a Request for Qualifications (RFQ) packet or the Request for Qualification Packet is also available on the district website at www.spokaneschools.org/solicitations.

The RFQ packet describes the selection process and documentation required for submitting qualifications for Appraisal Services. Any firm failing to submit their qualifications in accordance with the procedures and format set forth in the RFQ instructions may be considered non-responsive.

An evaluation by a District evaluation committee will follow and qualified firms may be requested to interview. Interviews will be conducted in accordance with a schedule to be determined by the District.

Questions and submittal information shall be directed to: Barb Carson, 509-354-7186, email: barbca@spokaneschools.org.

Final Submittals shall be delivered no later than Thursday, November 10, 2016 at 4:00:00 p.m. PST to the Purchasing Services Department, 2815 East Garland Avenue, Spokane, WA 99207.

SPOKANE SCHOOL Spokane Public Schools encourages participation of Minority Owned and Women Owned Business Enterprises.

BY ORDER OF THE BOARD OF DIRECTORS
DISTRICT NO. 81

Dr. Shelley Redinger, Secretary

To be advertised in the Spokesman Review – October 19th and 26th, 2016

INTRODUCTION

1. PURPOSE

Spokane Public Schools (SPS) is requesting statements of qualifications from qualified licensed real estate appraisal service firms interested in providing professional Real Estate Appraisal Services for a variety of properties for the School District. Appraisals are required for the purpose of determining fair market values associated with a variety of land purchases to include, but not be limited to single family housing, multi-family housing, commercial property and bare land. Appraisal services will be utilized by the district in the potential purchase of properties as well as the possible sale of District owned surplus real property. SPS is seeking qualified firms or individuals interested in providing appraisal services on an “as-needed” basis to include, but not be limited to preparing appraisal reports, studies, testimony, and surveys on property. To qualify for selection, respondents must be Washington State Certified General Real Estate Appraisers.

Given the varied areas of expertise required by SPS, it is the intent of this RFQ to draw on a pool of qualified respondents, with final award to more than one firm based on SPS needs, at the sole discretion of SPS.

2. PERIOD OF PERFORMANCE

The period of performance of any contract resulting from this RFQ will be for an initial twenty-one (21) month period through August 31, 2018 and may be renewed for additional periods based on the satisfactory performance of respondent. Contract renewals or extensions, if any, shall be at the sole discretion of SPS.

3. SCHEDULE

Date	Selection Process
October 19, 2016	Advertisement for Request Qualifications Published. (First Notice)
October 26, 2016	Advertisement for Request Qualifications Published. (Second Notice)
November 10, 2016	Request for Qualifications due by 4:00:00 PM PST
November 14-15, 2016	Screen Submittals
November 16, 2016	Notify short-listed firms – (Tentative) if Interviews are deemed necessary
November 21, 2016	Interviews – (Tentative) If deemed necessary by SPS
November 30, 2016	Board Approval/Contract Award

STANDARD TERMS AND CONDITIONS

1. **RFQ COMPLETION:** All interested providers are invited to submit qualifications in accordance with the requirements provided in the Request for Qualifications (RFQ). This RFQ packet describes the selection process and documentation required for submitting qualifications for the services. Any firm failing to submit their qualifications in accordance with the procedures and format set forth in the RFQ instructions may be considered non-responsive.

An evaluation by a Spokane Public Schools committee will follow, and qualified firms may be requested to interview. Interviews may be conducted in accordance with a schedule to be determined by the District.

2. **RFQ DUE DATE:** It is the responsibility of the provider to be sure the qualifications are sent sufficiently ahead of time and are received by the Purchasing Services Office no later than 4:00:00 PM PST on **Thursday, November 10, 2016**. RFQ's received at a location other than the Purchasing Services Office will not be accepted. Emailed or fax submittals will not be allowed.

All information shall be submitted on or before the date and time indicated herein to:

Spokane Public Schools Purchasing Services

Attention: Barb Carson
2815 East Garland Avenue
Spokane WA 99207

3. **RFQ PREPARATION:** The District shall not be liable for any costs incurred by a proposer associated with the preparation of a submittal in response to this RFQ. Those submitting RFQ's do so entirely at their own expense. There is no expressed or implied obligation by SPS to reimburse any firm or individual for any costs incurred in preparing or submitting qualifications. Qualifications submitted in response to this RFQ shall become the property of Spokane Public Schools.
4. **ACCEPTANCE/REJECTION:** SPS reserves the right to accept or reject RFQs, to waive informalities, and to contract in the best interest of SPS. This RFQ does not obligate SPS to contract for services specified herein.
5. **MINORITY OWNED AND WOMEN OWNED BUSINESS ENTERPRISES:** SPS encourages the participation of Minority Owned and Women Owned Business Enterprises in this Request for Qualifications. While SPS does not give preferential treatment, it does seek equitable representation from the minority and women owned businesses.

6. **TOBACCO/DRUG/WEAPON PROHIBITION:** All SPS owned and operated property are tobacco free, drug free, and weapon free environments. Proposer personnel shall conform to this policy at all times while on SPS premises.
7. **CONFLICT OF INTEREST:** SPS officers and employees may not accept or receive, directly or indirectly, a personal financial benefit; or accept any gift, token, membership, or service, as a result of an SPS contract entered into, or anticipated in the future, from any person, firm, or corporation.
8. **MANDATORY DISPUTE RESOLUTION PROCEDURE:** In the event that a dispute shall arise regarding the terms, conditions, or breach of this Solicitation, the parties shall, as a condition precedent to taking any action and as a condition precedent to seeking arbitration, mediate the dispute using the services of a mutually agreed upon independent mediator. Each party shall split the expenses of the mediator and the facility for the mediation. Each party shall otherwise pay its own expenses.
9. **PERSONAL LIABILITY:** It is agreed by the proposer hereto that in no event shall any official, officer, employee or agent of SPS when executing their official duties in good faith, be in any way personally liable or responsible for any agreement herein contained whether expressed or implied, nor for any statement or representation made herein or in any connection with this solicitation.
10. **CONTRACT FORMATION:** A submission in response to this solicitation is an offer to contract with SPS. Submittals become a contract only when legally awarded and accepted in writing by SPS.
11. **ACCEPTANCE PERIOD:** Submittals shall remain in effect for one hundred eighty (180) days for acceptance by SPS from the due date for receipt of qualifications.
12. **QUESTIONS:** Questions regarding this RFQs should be directed to Barb Carson, Purchasing Services, (509)354-7186 or barbca@spokaneschools.org. Last day for questions regarding this RFQ is Tuesday, November 1, 2016 at 4:00 PM.

PREPARATION AND SUBMITTAL OF QUALIFICATIONS

I. PREPARATION OF THE RFQ.

- A. PROPRIETARY INFORMATION / PUBLIC DISCLOSURE:** Under the Washington State Public Records Act, Chapter 42.56 RCW ("Public Records Act"), public records include, but are not limited to, bid or proposal submittals, agreement documents, contract work product, or other bid or proposal material. The Public Records Act requires that SPS promptly disclose public records upon request unless the Public Records Act or another Washington State statute specifically exempts records from disclosure. Exemptions are narrow and explicit and are listed in Washington State Law (reference RCW 42.56 and RCW 19.108). Proposers must be familiar with the Public Records Act and the limits of record disclosure exemptions. If any of the records you are submitting to SPS as part of your submittal are exempt from disclosure pursuant to a specific exemption, clearly and specifically identify each record and the specific exemption(s) that may apply. (If you are awarded an SPS contract, the same exemption designation will carry forward to the contract records.) Do not identify an entire page as exempt unless each sentence is within the exemption scope; instead, identify paragraphs or sentences that meet the specific exemption criteria. Only the specific records or portions of records properly identified by you as exempt will be considered for exemption. All other records will be considered fully disclosable upon request. The SPS will not assert an exemption from disclosure on your behalf. SPS will not withhold materials from disclosure simply because you take the position that they are exempt, but instead reserves the right to make its own determination. If SPS receives a public disclosure request for any records you have specifically listed as exempt, SPS may notify you of the request and, while not legally obligated to do so, may temporarily postpone disclosure in order to allow you to file a court injunction to prevent SPS from releasing the records (reference RCW 42.56.540). If you fail to obtain a court order, SPS will release the documents. By submitting a qualification packet the respondent acknowledges the obligations herein and acknowledges that SPS has no obligation or liability to the respondent if records are disclosed.

II. SUBMISSION OF QUALIFICATIONS.

- A. PREPARATION OF ENVELOPES:** Place each copy of the qualifications in a separate sealed envelope. On the front of each envelope, clearly note if it contains the original or a copy and place the following information:

“SEALED QUALIFICATIONS NO 12-1617”
PROFESSIONAL PROPERTY APPRAISAL SERVICES
DUE DATE AND TIME
YOUR COMPANY NAME

- B. SUBMISSION OF QUALIFICATIONS:** Submit four (4) copies of the qualification packet, as follows:

Original and Three (3) copies to:
Spokane Public Schools
Purchasing Services
Spokane Public Schools
2815 E. Garland
Spokane, WA 99207

NOTE: Submittals will not be accepted by fax or email

- B. DUE DATE:** It is the responsibility of the Respondent to be sure the submittals are sent sufficiently ahead of time to be received no later than 4:00 PM, PST on Thursday, November 10, 2016.

Respondents mailing submittals should allow normal mail delivery time to ensure timely receipt of their qualifications. SPS reserves the right to not consider submittals received late.

Submittals will be publicly acknowledged on the due date and time listed above in the Purchasing Services Office of SPS.

III. SUBMITTAL CONTENTS

- a. FORMAT:** Qualifications shall be submitted on eight and one-half by eleven inch (8 ½ x 11) paper with tabs separating the major sections of the submittal. The major sections of the submittal are to be submitted in the order noted below:

1. Letter of Introduction
2. Submittal documents
3. Qualifications
4. References and Customer Service

Submittals shall provide information in the same order as presented in this document with the same headings. This will not only be helpful to the evaluators of the submittal, but should assist the Proposer in preparing a thorough response.

- B. SUBMITTAL CRITERIA:** Submittals shall address the following under the major sections of the submittal:

1. LETTER OF INTRODUCTION

The letter of introduction should not be more than two pages. It is to provide a summary highlighting the firm's qualifications and special expertise to provide the services requested in this RFQ and may contain any information not shown elsewhere.

2. SUBMITTAL DOCUMENTS

- 2.1 Copies of applicable licenses and registrations, professional and regulatory, including up-to-date licenses issued by the State of Washington
- 2.2 RFQ Signature Page
- 2.3 Equal Opportunity/Debarment Certifications.
- 2.4 Completed W-9 Form

3. QUALIFICATIONS

4.

- 3.1 Company biography and other information: provide a brief company history including date founded, number of employees, company headquarters location and operating locations, and past projects and accomplishments. Include any changes in the mode of conducting business your firm has made in the past three (3) years, including any mergers, acquisitions, consolidations, downsizing or bankruptcy proceedings or filings.

3.2 Experience, Past Performance, and Capacity to deliver the proposed services:

- 3.2.1 Experience in conducting real estate appraisals for an agency of similar size of SPS.
- 3.2.2 Methods and resources utilized to conduct each type of appraisal.
- 3.2.3 Demonstrated knowledge of local real estate markets.
- 3.2.4 Breadth of work history in commercial, residential, industrial, and mixed use properties.
- 3.2.5 Appraisal experience of staff. Include resumes of all staff members who are proposed for this work to include professional and technical experience. Evidence of commitment to excellence in workmanship and professionalism as evidenced by awards and certifications.

- 3.2.6 Familiarity with engineering and architectural plans and drawings.
- 3.2.7 Ability to deal with controversial projects and unfriendly property owners.
- 3.2.8 Court/expert testimony experience for condemnation or other litigation

3.3 Litigation/Ethics

- 3.3.1 Provide the style and site of any current/pending litigation and any litigation settled or disposed within the past five (5) years against your firm, including its parent, sister or subsidiary companies, and subcontractors.
- 3.3.2 Provide detail of any ethics violations or board actions within the past five (5) years against you, including its parent, sister or subsidiary companies, and subcontractors
- 3.3.3 Potential conflict of interest with other clients, if any

5. REFERENCES

- 4.1 Provide and list a minimum of three clients of former governmental and/or commercial clients for whom you have performed similar or like services to include; company name, contact name, email and phone information.
- 4.2 Describe what sets your firm apart and where you excel at performance and customer service.

C. EVALUATION AND CONTRACT AWARD

1. EVALUATION PROCEDURE

Responsive submittals will be evaluated in accordance with the requirements stated in this solicitation and any addenda issued. Evaluation of submittals will be accomplished by an evaluation team, to be designated by SPS who will review the submittals in accordance with the evaluation criteria listed below. SPS may contact the respondents for clarification of any portion of the submittal.

2. EVALUATION CRITERIA

Evaluations of the submittals received may consider but shall not be limited to the following review criteria:

2.1 General Quality and Adequacy of Submittal

- Completeness and thoroughness
- Understanding of the services required

2.2 Organization, personnel, and Experience

- Qualifications and experience of individuals who will perform and supervise the work requested by SPS
- Technical capabilities of the firm
- Experience with similar projects
- Knowledge and familiarity with Spokane market
- Experience in providing appraisal services for the purpose of public procurement of property and/or the selling of municipal-owned real property
- Qualification/accreditation as a review appraiser
- Firms history of ethics violations or board actions

2.3 Outcomes

- Demonstrated timeliness

2.4 Availability

- Capability to meet schedules and deadlines
- Current workload and ability to commence requested projects
- Ability to work closely with SPS staff

3. ORAL PRESENTATION MAY BE REQUIRED

Written submittals and oral presentations, if considered necessary, will be utilized in selecting the successful respondents. SPS, at its sole discretion, may elect to select the top scoring finalists from the written submittal evaluation for an oral presentation and final determination of contract award(s). Should SPS elect to hold oral presentations, it will contact the top scoring firm(s) to schedule a date, time and location. Commitments made by the proposers at the oral interview, if any, will be considered binding.

Key personnel from proposing teams to be assigned to SPS are required to be present at the oral presentation. In addition to the material requested by the RFQ and information which may be requested by the Evaluation Committee, the short-listed firms may be provided with additional questions to discuss in the interview.

4. RECOMMENDATION

Based on the recommendations of the SPS Selection Committee, and approval of the SPS School Board, a contract(s) may be awarded to more than one firm. Award recommendation will be structured to provide services in each area of expertise (eg commercial, residential, etc). SPS reserves the right to reject any or all submittals, to award in the best economic interest of SPS, and to waive any informalities or irregularities in the solicitation process.

5. DEBRIEFING OF UNSUCCESSFUL RESPONDENTS

Upon request, a debriefing conference will be scheduled with an unsuccessful proposer. Discussion will be limited to a critique of the requesting proposer's submittal. Comparison between submittal or evaluations of the other firms will not be allowed. Debriefing conferences may be conducted in person or on the telephone.

ADDITIONAL CONTRACT TERMS

1. COMPLIANCE WITH RULES AND LAWS

Each party shall comply with all applicable federal, state, and local laws and regulations. All SPS property is tobacco free, drug free, and weapon free environments. All personnel shall conform to this stated policy at all times while on the premises.

2. INDEPENDENT CONTRACTOR

The parties intend that an independent contractor-employer relationship will be created by any awarded contract as a result of this RFQ.

3. INSURANCE

During the term of any contract as a result of this RFQ, Respondent shall maintain in full force and effect at its own expense, each insurance coverage noted below:

- A. Worker's Compensation Insurance in compliance with RCW 51.12.020, which requires subject employers to provide workers' compensation coverage for all their subject workers and Employer's Liability or Stop Gap Insurance in the amount of \$1,000,000;
- B. General Liability Insurance on an occurrence basis, with a combined single limit of not less than \$1,000,000 each occurrence for bodily injury and property damage. It shall include premises and operations, independent contractors, products and completed operations, personal injury liability and contractual liability coverage for the defense, indemnity and hold harmless obligations provided under this Agreement. It shall provide that SPS, their officers and employees are additional insureds, but only with respect to Proposer's services to be provided; and
- C. Automobile liability Insurance with a combined single limit, or the equivalent of not less than \$1,000,000 each accident for bodily injury and property damage, including coverage for owned, hired and non-owned vehicles.
- D. Professional Errors and Omissions Liability Insurance coverage of no less than 1,000,000 per occurrence and \$2,000,000 aggregate.

Proposer or its insurer(s) shall provide thirty (30) days' written notice to SPS of any cancellation, material change, reduction of limits or intent not to renew the insurance coverage(s).

As evidence of the insurance coverages required by this RFQ, Respondent shall furnish acceptable evidence of the required insurance to SPS at the time it submits its proposal. The evidence of insurance shall specify all of the parties who are to be named additional insured, include applicable policy endorsements, and the deductible or retention level, as well as policy limits. Insuring companies or entities are subject to SPS acceptance and must have a rating of A- or higher by Best. Copies of all applicable endorsements shall be provided upon contract award. Proposer shall be financially responsible for all pertinent deductibles, self-insured retentions, and/or self-insurance.

4. INDEMNIFICATION

Respondent shall defend, indemnify and hold harmless SPS, its officers and employees, from all claims, demands, or suits in law or equity arising from Respondent's negligence or breach of its obligations under any awarded contract. Respondent's duty to indemnify shall not apply to liability caused by the negligence of SPS, its officers and employees. Respondent's duty to indemnify for liability arising from the concurrent negligence of SPS, its officers and employees and Respondent, its officers and employees shall apply only to the extent of the negligence of Respondent's, its officers and employees. Respondent's duty to defend, indemnify and hold harmless shall survive termination or expiration of any awarded contract. Respondent will waive, with respect to the SPS only, its immunity under Title 51 RCW, Industrial Insurance.

5. NONDISCRIMINATION

No individual shall be excluded from participation in, denied the benefit of, subjected to discrimination under, or denied employment in the administration of or in connection with any awarded contract because of age, sex, race, color, religion, creed, marital status, familial status, sexual orientation, national origin, honorably discharged veteran or military status, the presence of any sensory, mental or physical disability, or use of a service animal by a person with disabilities.

6. ASSIGNMENTS

Upon contract award as a result of this RFQ, neither party may assign, transfer or subcontract its interest, in whole or in part, without the other party's prior written consent, which shall not be unreasonably withheld, conditioned or delayed. In the event of an assignment or transfer, the terms of any contract shall continue to be in full force and effect.

7. DISPUTES

This RFQ in addition to any awarded contract shall be performed under and governed by the laws of the State of Washington. Any litigation to enforce this Agreement or any of its provisions shall be brought in Spokane County, Washington.

8. FAILURE TO PERFORM EXCUSED / FORCE MAJEURE

Neither party hereto shall be liable to the other party for any nonperformance, in whole or in part, of its obligations under this RFQ or any awarded contract caused by the occurrence of any contingencies beyond the reasonable control of such other party, including but not limited to declared or undeclared war, sabotage, insurrection, riot, or other acts of civil disobedience, acts of a public enemy, strikes, labor disputes, acts of third parties not within the control of such other party, shortages of fuel, failures of power, accidents, fires, explosions, floods or other acts of God.

9. PROTEST OF CONTRACTOR SELECTION OR CONTRACT AWARD

Any actual Respondent who is aggrieved in connection with the selection of a Firm or award of a contract in relation to the RFQ, may submit a protest to SPS' Purchasing Services Department. The protest will be submitted in writing within seven (7) calendar days after such aggrieved person knows or should have known the facts which give rise to the protest. The protest must set forth in specific terms and alleged reason the Firm selection or Appraisal Services Agreement award is erroneous. Written protests are to be directed to:

Cindy Coleman
Director, Business Services
2815 E. Garland
Spokane, WA 99207

QUALIFICATION SUBMITTAL DOCUMENTS

SUBMITTAL CERTIFICATION

I certify that I am authorized to represent _____ (company)
in providing this RFQ response and that by signing this form I certify to the best of my
knowledge the information submitted in the Qualifications Packet is a true and accurate
representation of my company's qualifications.

Receipt of addenda numbered _____ is hereby acknowledged _____
(Fill in number of each addenda received) (Respondent's Initials)

Company

Date

Address

Phone

Printed Name and Title

Signature

Email Address

UBI Number

I. EEO / Debarment Certification

PART I: STATEMENT REGARDING EQUAL EMPLOYMENT OPPORTUNITY

We hereby certify that we have made a conscientious effort to comply with federal, state and local equal employment opportunity requirements in bidding this project and we will make the same efforts in fulfilling the requirements if awarded the Contract.

We further designate the following as the person who has been charged with the responsibility for securing compliance with and reporting progress on affirmative efforts.

Name: _____

Title: _____

Phone Number: _____

PART II: CERTIFICATION REGARDING DEBARMENT, SUSPENSION, INELIGIBILITY AND VOLUNTARY EXCLUSION

In submitting the qualifications to do the work as outlined in the Contract Specifications, we hereby certify that we have not been suspended or in any way are excluded from Federal procurement actions by any Federal agency. We fully understand that, if information contrary to this certification subsequently becomes available, such evidence may be grounds for non-award or nullification of the Contract.

This certification is required by the regulations implementing Executive Order 12549, Debarment and Suspension, Participant's responsibilities.

Signed: _____

Date: _____

Title: _____

Firm: _____

Address: _____

City State & Zip: _____