

# REQUEST FOR PROPOSALS

SAUK COUNTY CONSERVATION, PLANNING & ZONING DEPARTMENT

## Streambank Easement Appraisals

Monday, January 28, 2012

---

- I. Point of contact: Serge Koenig, Brentt Michalek, Gina Templin  
Conservation, Planning & Zoning Department  
Sauk County West Square Building  
505 Broadway  
Baraboo, WI 53913  
608-355-3245
- II. Proposal Due Date: Two sealed copies of the proposal must be received and date stamped not later than 4:30 p.m., Central Standard Time, Friday, February 15, 2013. Proposals or amendments received by Sauk County after that time will not be considered. Public Opening of proposals will be conducted by the Sauk County Conservation, Planning & Zoning Department, Monday, February 18, 2013 at 8:30 a.m. at the Sauk County West Square Building, 505 Broadway, Baraboo, Wisconsin 53913.

III. **ALL PROPOSALS MUST BE ADDRESSED TO:**

**Sauk County Conservation, Planning & Zoning  
Attn: Serge Koenig  
Sauk County West Square Building  
505 Broadway  
Baraboo, Wisconsin 53913**

The words "**STREAMBANK EASEMENT APPRAISALS**" must be marked on the opaque, sealed envelope.

### PART ONE

#### INTRODUCTION AND GENERAL INFORMATION

##### 1. INTRODUCTION

- 1.1 This document constitutes a request for competitive, sealed proposals from qualified appraisers to supply the Conservation, Planning & Zoning Department with a proposal to provide appraisal services in accordance with the terms and conditions set forth herein. Additionally, this award does not guarantee the use of

the services or guarantee any definite award of quantity. Simply that the vendor is prequalified for the award of contracts under this process.

## 2. ORGANIZATION

2.1 This document, referred to as a Request for Proposals (RFP), has been divided into the following parts for the convenience of the purchaser:

2.1.1 Part One - Introduction and General Information

2.1.2 Part Two - Specifications

2.1.3 Part Three - Proposal Submission Information

2.1.4 Part Four - Exhibits / Pricing Page

## 3. DEFINITIONS

3.1 For the purpose of this RFP the proposer will be referred to as “Proposer” or “Vendor”, and Sauk County and the Sauk County Conservation, Planning & Zoning Department will be referred to as “County”.

## 4. BACKGROUND INFORMATION

4.1 Sauk County is one of 72 units of county government in the State of Wisconsin and is a municipal corporation existing pursuant to the authority of Chapter 59 of the Wisconsin Statutes. Sauk County encompasses 840 square miles including 22 towns, 13 villages, and 2 cities. The County has an estimated population of 55,255. County operations include a skilled nursing facility, a human services department, a law enforcement agency, a state circuit court system, a highway department, a parks department, a tax administration and collection office, and other government related functions.

## PART TWO

### SPECIFICATIONS

#### 1. DOCUMENTATION OF APPRAISAL PROCESS/SERVICES

1.1 Vendors are requested to identify each proposal and to provide brief statements which identify the reason(s) Sauk County should consider you as a pre-qualified appraisers to prepare appraisals consistent with the Highway 12 Corridor Growth Management Plan. As part of the selection process, we are asking you to review/process information provided and then complete and return the enclosed Request for Proposal.

1.2 The Conservation, Planning & Zoning Department is interested in acquiring a list of pre qualified appraisers to prepare appraisals consistent with the Baraboo Range Protection Program and the Highway 12 Corridor Growth Management Plan.

- 1.3 The Plan describes the intended goals of the Highway 12 Corridor Growth Management Plan and covers the basic requirements for permanent land protection, including that land or rights in land be acquired only from willing sellers at or below “fair market value” as established by a full narrative appraisal. Appraisal procedures are described in the BRPP Plan, **Sec. VII, (2) Program Application Steps, Step 8, p. 21**: “Appraisals must be performed by State Licensed or Certified Appraisers. General Certified Appraisers are recommended.” DNR appraisal guidelines will be followed for all Streambank appraisals. Guidelines may be obtained from WDNR Real Estate Specialist, at 3911 Fish Hatchery Road, Madison, WI 53711.
- 1.4 Services may be contract for a 4 year period ending on December 31, 2016.

## 2. FUNCTIONAL SPECIFICATIONS

- 2.1 Provide full narrative appraisals, consistent with WDNR Narrative Appraisal guidelines, for land or development rights in land being proposed for acquisition through streambank easements, as detailed in the Highway 12 Growth Management Plan and the US Highway MOU.
- 2.2 Provide reviews of fair market appraisals submitted by others for streambank easement acquisitions to ensure conformance with required program standards and applicable appraisal guidelines established by WDNR.

## PART THREE

### PROPOSAL SUBMISSION INFORMATION

1. PROPOSERS PRESENTATION/REPUTATION AND RELIABILITY/EXPERIENCE
  - 1.1 Reputation and Reliability of the vendor’s organization and qualifications is considered in the evaluation process. Therefore, the vendor is advised to submit any information which documents successful and reliable experience in past performance related to the requirements of this RFP. ***In particular, vendors are advised to provide copies of professional credentials certifying State Appraisal Licensing or Certified General Appraisal status in the State of Wisconsin.***
  - 1.2 The vendor should provide information related to previous and current contracts which are considered identical or similar to the requirements of this RFP. ***In particular, vendors are advised to submit a recent example of a full narrative appraisal report prepared by the vendor which complies with current Wisconsin Department of Natural Resources full narrative appraisal guidelines.***
  - 1.3 The vendor should provide information related to familiarity with the appraisal format and standards spelled out in the Yellow Book and provide documentation showing that they have taken Yellow Book appraisal training classes, if taken. Examples include: Uniform Appraisal Standards for Federal Land Acquisition and Federal Land Exchanges and Acquisitions.

- 1.4 The vendor should provide information related to completion of any Yellow Book compliant appraisals that have been reviewed and approved for use by state agencies and list those agencies.
- 1.5 The vendor should provide documentation showing experience appraising conservation easements and who the client was. Example easements should include experience with the following: Scenic Easement, Wetland, Non-development, Purchase of development rights, Wetland reserve, Farmland protection, Grassland protection, Streambank protection, and Habitat management easements.
- 1.6 The vendor should provide documentation for any conservation easements reviewed and approved for use by any state or federal agencies. They should include detail as to for what programs and which agencies.
- 1.7 Additional training/classes. The vendor should note if they have participated in any easement appraisal classes, rural or land appraisal classes or similar classes such as: Conservation Easements Valuation and Case Studies (CEVAL), Conservation Easements (EASEMENT), 401 The Appraisal of Partial Acquisitions 5 day, Easement Valuation, Fundamentals of Rural Appraisal (A-10), Principles of Rural Appraisal (A-20), Advanced Rural Appraisal (A-30) Conservation Easements Valuation and Case Studies (CEVAL), Conservation Easements (EASEMENT), Land Valuation Assignments , Land Valuation Adjustment Procedures, Appraising Agricultural Land in Transition, The Valuation of Wetlands.
- 1.8 The Proposer by making a Proposal represents that he or she has read and understands the Request For Proposals and the Proposal is made in accordance therewith.

## 2. INTERPRETATION OR CORRECTION OF PROPOSAL DOCUMENTS

- 2.1 Proposers requiring clarification or interpretation of the Proposal Documents shall make a written request which shall reach the Point of Contact at least seven days prior to the date for receipt of Proposals.
- 2.2 Interpretations, corrections and changes of the Proposals Documents will be made by Addendum. Interpretations, corrections and changes of the Proposal Documents made in any other manner will not be binding and Proposers shall not rely upon them.
- 2.3 Failure to request clarification or interpretation of Contract Documents will not relieve Purchaser of responsibility. Signing of Proposals will be considered as implication that Purchaser has thorough comprehension of full intent of scope of requirements and documents.
- 2.4 The County will not be responsible for oral instructions. Only a written interpretation or correction by Addendum shall be binding. No Proposer shall rely upon any interpretation or correction given by any other method.

3. ADDENDA

- 3.1 Addenda will be mailed or delivered to all bidders who are known by the County to have received Request For Proposal documents.
- 3.2 Copies of Addenda will be made available for inspection wherever Proposal Documents are on file for that purpose.
- 3.3 Each Proposer shall acknowledge receipt of all Addendum issued on Proposal Form, or Proposal may be rejected.

4. SUBMISSION OF PROPOSALS

- 4.1 One original proposal and one (1) copy shall be sealed in an opaque envelope. The envelope shall be addressed to the address specified for receiving Proposals and shall be identified with the words "STREAMBANK EASEMENT APPRAISALS" written plainly on the front of the envelope. If the Appraisal is sent by mail, the sealed envelope shall be enclosed in a separate envelope with the notation "Sealed Proposal Enclosed" on the face thereof. The Proposer shall not submit a bid by fax machine because only sealed proposals are acceptable in response to this RFP.
- 4.2 Proposals are due in the Conservation, Planning and Zoning office prior to the time and date stated on first page. Proposals received after the time and date for receipt of Proposals will be returned unopened.
- 4.3 The Proposer shall assume full responsibility for timely delivery at the location designated for receipt of Proposals.
- 4.4 Oral, telephonic, facsimile or telegraphic Proposals are invalid and will not receive consideration.
- 4.5 Any form containing a signature line must be manually signed and returned as part of the proposal.
- 4.6 All blanks on the Proposal form shall be filled in by typewriter or manually in ink. If the items to be filled in are unintelligible, the Proposal shall be rejected. The Proposer shall make no additional stipulations on the Proposal form nor qualify the Proposal in any other manner.
- 4.7 Where so indicated by the makeup of the Proposal form, the sums shall be expressed in both words and figures, and in case of discrepancy between the two, the amount written in words shall govern.
- 4.8 Interlineations, alterations and erasures must be initialed by the signer of the Proposal.

4.9 The Proposal shall include the legal name and address of the Proposer. A Proposer may be a sole proprietor, partnership, corporation or other legal entity. Each Proposal shall be signed by a person or persons legally authorized to bind the Proposer to a contract.

## 5. MODIFICATION OR WITHDRAWAL OF PROPOSAL

5.1 Prior to the time and date designated for receipt of Proposal, a Proposal submitted may be modified or withdrawn by notice to the County at the place designated for receipt of Proposals. Such notice shall be in writing over the signature of the Proposer or by facsimile; if by facsimile, written confirmation over the signature of the Proposer shall be mailed and postmarked on or before the date and time set for receipt of Proposals. A change shall be so worded as not to reveal the amount of the original Proposal.

5.2 After the time Proposals are due, a Proposer shall not be allowed to correct a proposal.

5.3 Upon authorization of the appropriate legislative oversight authority, Contract shall be effective upon execution by the Purchaser and the County.

5.4 Proposals shall be effective and open for acceptance for a period of 30 days after date and time set for receipt of proposals.

## 6. CONSIDERATION OF PROPOSALS

6.1 The properly identified Proposals received on time will be opened publicly and will be read aloud.

6.2 The County shall have the right to reject any or all Proposals, or to waive informalities or irregularities in Proposals received and to accept the Proposal(s) which, in the County's judgment, is in the County's best interests. The County shall have the right to reject a Proposal not accompanied by other required data.

6.3 It is intended to create a listing of qualified Appraisers to use for services related to the Streambank Easement process and award of each individuals Contract will be made to the Proposer who is the most fiscally beneficial for the project, responsible, and responsive.

## PART FOUR

### EXHIBITS/PRICING PAGE

1.0 The Vendor shall, as part of this purchase contract, agree that Sauk County shall not be subject to any price increases, from the time the contract is accepted by Sauk County and during the term of the contract. Sauk County shall be able to acquire the equipment and services at the new price in the event of price reductions during this same period.

2.0 This award does not guarantee the use of the services or guarantee any definite award of quantity. Simply that the vendor is prequalified for the award of contracts under this process.

- 3.0 The vendor hereby agrees to provide the services and/or items at the prices quoted, pursuant to the requirements of this document and further agrees that when this document is countersigned by an authorized official of Sauk County, a binding contract, as defined herein, shall exist between the vendor and Sauk County.

Appraiser: _____		
Firm: _____		
Address: _____		
Phone: _____	Fax: _____	E-mail: _____
Attachments:		
<i>Copies of professional credentials certifying State Appraisal Licensing or Certified General Appraisal status in the State of Wisconsin.</i>		
<i>A recent example of a full narrative appraisal report prepared by the vendor which complies with current Wisconsin Department of Natural Resources full narrative appraisal guidelines.</i>		
If wish to be pre-certified as an appraiser for the Streambank Easement Program associated with the Highway 12 MOU, please complete this Request for Proposal sheet with the requested attachments and return by mail by <b>February 15, 2013</b> to:		
Serge Koenig or Gina Templin Sauk County Conservation, Planning and Zoning 505 Broadway Baraboo, WI 53913		
Phone: 608.355.3245	Fax: 608.355.3292	E-mail: <a href="mailto:skoening@co.sauk.wi.us">skoening@co.sauk.wi.us</a> <a href="mailto:gtemplin@co.sauk.wi.us">gtemplin@co.sauk.wi.us</a>

\_\_\_\_\_  
 AUTHORIZED SIGNATURE

\_\_\_\_\_  
 Date

\_\_\_\_\_  
 PRINTED NAME

\_\_\_\_\_  
 Title

\_\_\_\_\_  
 VENDOR

\_\_\_\_\_  
 Brentt P. Michalek,  
 Director, Sauk County Conservation, Planning & Zoning Department

\_\_\_\_\_  
 Date

