

# REQUEST FOR QUALIFICATIONS AND PROPOSALS PROPERTY VALUATION APPRAISAL SERVICES

## I. INTRODUCTION

The Washington Counties Risk Pool ("WCRP" or "Pool") is an association established by interlocal cooperative agreement among the several signatory Washington counties under Chapters 48.62 and 39.34 RCW to jointly self-insure risks, jointly purchase insurance or reinsurance, and to contract for risk management, claims, and administrative services. The Pool, headquartered in Tumwater, Washington, presently provides or coordinates the provision of joint casualty and property insuring programs for 26 of Washington's 39 counties.

The WCRP is seeking proposals from qualified firms to perform **Property Valuation Appraisal Services** of select properties covered under the Pool's *Washington Counties Property Program*. The firm selected will be expected to provide appraisals for both actual and replacement values, and reproduction values for those scheduled properties specified by several participating counties as being of an historic nature.

The WCRP reserves the right to reject any and all proposals, to waive any informality, and to negotiate with the selected Firm prior to entering into any agreement. An accepted proposal becomes a contractual obligation of the Firm. Failure of the Firm to accept any of these obligations will result in the immediate cancellation of the agreement.

Five (5) printed copies of each responding Firm's proposal shall be sent or delivered to the WCRP office and received by close of business Thursday, the Fifteenth day of December 2014. Proposals received after this deadline will be rejected or disqualified. Proposals are to be directed and delivered to the address below:

Washington Counties Risk Pool  
**Attn: Property Valuation Appraisal Services**  
2558 R W Johnson Road S.W., Suite 106  
Tumwater, WA 98512-6103

Data and documentation included in the proposal shall become the property of the WCRP and as such will become public information upon the formal opening of the proposal.

Questions regarding this request for qualifications and proposal, or requests for other information that the Pool agrees should be provided, shall be directed to Executive Director Vyrle Hill at 360/292-4495 or [vyrle@wcrp.wa.gov](mailto:vyrle@wcrp.wa.gov). Any such 'material' information provided by the WCRP will be provided to all Firms that have formally expressed interest to ensure equity under this process.

## II. QUALIFYING FIRM

A qualified Firm is one that has provided documentation detailing the resources and assets to assure the professional quality, technical quality, timely completion, and coordination of the services that has been furnished by an officer or authorized employee or agent of that Firm in support of the Scope of Work provided herein. The Firm shall demonstrate that it can perform all services according to high professional

standards. This includes compliance with all other applicable rules, regulations, and industry standards.

### **III. INFORMATION REQUIRED**

1. Client List. Describe clients handled, particularly by the account staff that will be assigned to the WCRP. Please describe those clients/public entities, which are similar to the WCRP. Provide names and telephone numbers for at least five (5) clients that WCRP representatives may contact for reference purposes.
2. Historic Reproduction. Describe any special expertise the Firm has in conducting historic properties' reproduction appraisals.
3. Other Services. The Firm may list other services it can and would be willing to provide which may differentiate it from other appraisal Firms submitting proposals.
4. Personnel.
  - (a) The Firm shall provide resumes for the property appraiser(s) and key support staff or other personnel to be actively involved with the WCRP. Identify the make-up and the number of other clients directly handled by each.
  - (b) The Firm shall designate a qualified person (officer, employee or agent) to act as Project Manager and oversee the Contract. The Project Manager shall be the primary point of contact for all issues involving payments, quality, service complaints, and other matters arising under this Contract. The Project Manager shall be available to meet with the WCRP Executive Director or his assigned staff to discuss the Contract status or related issues as the need arises. The Firm's associates and employees shall serve under the personal supervision of the Project Manager.
  - (c) The Firm shall ensure that all personnel performing work under this Contract possess appropriate licenses and/or registrations and/or accreditations required under applicable federal, state or local law for the particular services being performed.
5. Fee Structure. The Firm shall provide a fee and pricing structure to support work conducted pursuant to the Scope of Work.
6. Work Plan. The firm shall provide a detailed approach and work plan including the anticipated time frame to accomplish the tasks identified in the Scope of Work.
7. Member Services. The WCRP is a risk transfer pooling agency made up of many of Washington's counties. The level of understanding of property values and property valuation varies greatly. Also, the ability to obtain timely and sometimes accurate information may be difficult. Please describe how your Firm can provide assistance/services to assist with these unique situations. Describe any similar situations, entities, or pooling agencies that your Firm has worked with where you experienced and addressed similar concerns and issues.

### **IV. SCOPE OF WORK – SERVICES REQUIRED**

The Firm selected will agree by written contract to provide the following services:

1. General Scope. The Firm shall be qualified to and will provide comprehensive property valuation services for insuring purposes including building and content values determined with replacement and market or actual cash value appraisals, as well as reproduction cost appraisals for identified historic structures.
2. Background to RFQ/P. The WCRP maintains composite schedules of values (“SOVs”) for the properties of its 26 participating counties covered under the *Washington Counties Property (insuring) Program*. In 2009 WCRP, through a prior RFQ/P process selected the services of an appraisal firm to systematically appraise many of the properties within the SOVs. This service appraised many of the higher valued and/or more complex or historic properties in the SOVs. Under the State’s pooling regulations and the Pool’s operating policies, the Pool is obliged to renew its consultant selections through competitive solicitation every 5 to 6 years.
3. Appraisal Services.
  - (a) The selected Firm shall review the present composite SOV and recommend an approach to maintain the SOVs and the values established through professional appraisals and/or annual inflation/construction adjustments to keep the SOVs current.
  - (b) The Firm will likely be asked to appraise most higher-valued additions to the counties’ inventories or major remodels to existing structures.
  - (c) The Firm shall appraise utility facilities, e.g. substations, water/sewer treatment facilities, pump/lift stations that are listed or may be added to the SOVs.
  - (d) The Firm shall verify the accuracy of the buildings, construction details, and values as provided in the SOVs. The following details shall be captured at a minimum: Building Description, Building Address (including Zip Code) with GPS coordinates, ISO Construction Type, Year Built, Number of Above- and Below-Ground Stories, Above- and Below-Ground Square Footages, Sprinkler or Fire Suppression and Alarm Systems, Fire Protection Class, Flood Zone, EQ Zone,, Upgrades, Historic Reproduction Value if applicable, Replacement Building Value, Content Value, Equipment Value, and any other pertinent details.
  - (e) The Firm shall provide drawings, designs, photos and building details by location in an acceptable format.
  - (f) The Firm shall provide electronic summary reports in MS-Excel spreadsheet format and deliver using USB Drive, Compact Disk or similar storage medium.

## V. SELECTION PROCESS

RFQ/P distribution/published	November 10, 2014
Deadline for receipt of proposals	December 11, 2014
Semi-finalist interviews	January 12 – 23, 2015
Finalist selection	January 30, 2015
Contract Negotiation	First week of February 2015

The WCRP reserves the right to change this RFQ/P schedule, and/or recall or re-issue the RFQ/P. Prior to the execution of an agreement, the WCRP reserves the right to reject any or all proposals at any time, with no penalty, and without divulging the reasons for which the submittals were rejected or accepted.

Firms are responsible for all errors or omissions in their proposals, and any such error or omission will not serve to diminish their obligation to the WCRP.

Submitting Firms must certify that all statements contained in their proposals are accurate and valid. Each Firm's proposal, insofar as it is not inconsistent herewith, will be incorporated into the final agreement by reference.

The WCRP cannot be responsible for any proprietary information contained in the Firm's proposal requested then disclosed under the state's Public Records Act.

## **VI. BACKGROUND INFORMATION**

The WCRP was established in 1988 via Interlocal Cooperative Agreement (Chapter 39.34 RCW) to provide its member counties with "joint" programs and services including self-insurance, purchasing of insurance, and contracting for or hiring of personnel to provide administrative services, claims handling and risk management. The Pool operates under Washington's "pooling" laws (Chapter 48.62 RCW), and it is overseen by the State Risk Manager with fiscal audits performed annually by the State Auditor.

### **1. Pool Exposure Base**

- Presently, 26 small- to large-sized member counties across the state.
- 25.7 million (Total Annual) worker hours.
- 7,300 licensed vehicles and small marine craft.
- Approximately 2,600 real properties (26 participants).
- Insured values (facilities, contents, equipment, vehicles and mobile equipment) approximating \$2.7 billion.

### **2. Miscellaneous**

- The Pool has three (general membership sessions) board of directors meetings and other Executive Committee meetings each year.
- The Pool also has 11 employees, and the Executive Committee has 11 members.