



citycounty insurance services  
cisoregon.org

## Request for Proposals (RFP)

### Property Appraisal Services

CIS  
1212 Court St. NE  
Salem, OR 97301  
(503) 763-3800

<b>RFP Schedule</b>	
Issuance of RFP:	<b>November 30, 2020</b>
Submission of Questions about the RFP:	<b>December 15, 2020, 5:00 p.m. (PT)</b>
Proposal Due:	<b>January 29, 2021, 5:00 p.m. (PT)</b>
Finalist Interviews (if needed):	<b>March 1, 2021</b>
Anticipated Contract Award:	<b>March 15, 2021</b>
Commencement of Contract:	<b>June 15, 2021</b>

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## ADDENDUM

### A. BACKGROUND

On November 30, 2020, CIS issued a Request for Proposals (RFP) to solicit offers from qualified vendors to provide property appraisal services for CIS Trust ("CIS").

CIS is issuing this Addendum to the RFP to respond to written questions we received from potential proposers. The Addendum modifies the original RFP document only to the extent indicated. All other areas of the original RFP remain in effect and can only be modified in writing by CIS. This Addendum is made an integral part of the original RFP. It is the responsibility of all proposers to conform to this Addendum. Proposers who have already submitted proposals may either: 1. Submit an addendum to their proposal; or 2. withdraw the original proposal and submit a new one. Any addendum or revised proposal must be submitted no later than the **Proposal Due Date of 5:00 p.m. (PT) on January 29, 2021.**

### B. PROPOSAL DUE DATE CHANGED

CIS is also issuing this Addendum to the RFP to extend the proposal due date. On page 4, Section III(A) "RFP and Evaluation Schedule", the deadline for submitting proposals is changed from 5:00 p.m. (PT) on January 15, 2021 to **5:00 p.m. (PT) on January 29, 2021.**

Finalists will be selected after the Proposal Due Date. All other dates that followed the Proposal Due Date on the RFP and Evaluation Schedule have been updated accordingly.

### C. RESPONSES TO QUESTIONS

**Question 1.** On Pg. 4 you reference an underwriting system – can you please advise which vendor's program you currently use or if this is an in-house, proprietary system?

**CIS Response:** CIS uses a proprietary system that was built in-house.

**Question 2.** With regard to the threshold options,

a. Can you confirm the structure quantities look like this:

- ALL structures  $\approx$  14,000 line items;
- Between \$250k and \$500k current value = 1,698 items;
- Over \$500k current value = 3,367 items; thus,
- Below \$250k = roughly 8,935 items?

**CIS Response:** These are approximate figures. Members add and delete properties throughout the coverage year.

- b. Are these thresholds established using ONLY the Building values, or do you combine Bldg and Content values to establish them?

**CIS Response:** Buildings only. However, processes at treatment plants and other building/attached equipment type structures such as lift stations and pump houses include structure and attached equipment value total in the building value.

**Question 3.** What other companies have been provided the opportunity to reply to this RFP?

**CIS Response:** This is an open RFP. Any company meeting qualifications is welcome to respond.

**Question 4.** Would CIS be interested in vendors including information and pricing for a property risk management software application to manage and perpetuate the property data and values?

**CIS Response:** No, we are not interested in this type of product.

**Question 5.** How would CIS like observed "hazards" shown on report...Notes section?

**CIS Response:** Yes, in the Notes section of the photo report pages.

**Question 6.** Do CIS want a detailed list of "land improvements" at each site or described in notes section or in a separate report/data file?

**CIS Response:** Currently, the land improvements are detailed and valued in the Notes section of the photo report page.

**Question 7.** Are "flood zones" certificates required or simply verification of flood zones?

**CIS Response:** Flood zone certificates are not required, but we need flood zones confirmed as a part of the appraisal process.

**Question 8.** Will underground process piping information at the WWTAP be available from Members?

**CIS Response:** Yes. Members provide the information to value the piping at treatment plants.

**Question 9. What percentage of change is considered a “large swing in value” 10/20/30 other?**

**CIS Response:** There isn’t a specific percentage; we are just looking for swings in analysis of values.

**Question 10. Do you require an annually trended file in all non-appraised locations, or a document with trends by building class?**

**CIS Response:** CIS gets information on building and contents trends from various sources including our appraisal firm to decide about trending in the upcoming renewal year. However, we do not need the appraisal firm to trend non-appraised property for us; our database does that for us.

**Question 11. Do you require hard copies of final reports, or is PDF acceptable?**

**CIS Response:** CIS prefers emailed copies of preliminary and final reports for our copies to review. Preliminary PDF reports are emailed to the agent and member before the final reports are set. While the current appraisal firm sends hard copies of the final reports to the agent and member directly, hard copies are not required.

**Question 12. Are “traffic signals” included in the scope of property to appraise?**

**CIS Response:** Some of our membership insure traffic signals and they have been appraised in the past. However, they may not be included in the future.

**Question 13. Can we propose a revised language to the “indemnity provision” with our submission?**

**CIS Response:** You may propose different language, but acceptance is up to CIS’ discretion.

**Question 14. Please provide locations of adjacent states in which the project will contain properties for valuation.**

**CIS Response:** All locations are in Oregon, except for the City of The Dalles airport.

**Question 15. Property values, \$250k to \$499k and potential properties valued over \$500k  
a. Is there a particular order of precedence as to site inspections?**

**CIS Response:** No.

**b. Is there a breakdown of the building types?**

**CIS Response:** Each building on a member's schedule has a construction class listed that would be provided each year to the appraisal firm. The appraisal firm will be required to confirm the class is correct.

**c. Is there a breakdown of the building square footages? If not, is there an overall square footage available?**

**CIS Response:** The property schedules include square footage by building. The appraiser will be required to confirm square footage at the time of the appraisal.

**d. Is there a location breakdown for the buildings for scheduling purposes?**

**CIS Response:** Property schedules include the address of each building.

**e. Are the original construction dates available for each structure?**

**CIS Response:** Yes, but the appraisal firm is required to confirm the dates are correct and provide any renovation dates.

**Question 16. Onsite physical inspections & appraisals**

**What are the requirements, certifications constituting "professional appraisal services"?**

**CIS Response:** The successful firm will have extensive experience in appraisal services, including certified appraisers with experience performing appraisals for insurers and/or pools.

**Question 17. Can CIS provide a copy of a previous report to clarify the level of detail necessitated?**

**CIS Response:** Yes.

**Question 18. Will CIS provide sample Oregon Prevailing Wage Determinations to be used or shall the awarded party utilize the Oregon Bureau of Labor & Industries and other industry best practice?**

**CIS Response:** No. We look to the successful firm to maintain current knowledge of prevailing wages.

**Question 19.** Please provide further details as to the expected deliverables in reference to "historical cost", ie: CIS historical cost vs Awarded Party historical cost.

**CIS Response:** Some of our members have buildings on the historical registry or buildings that have components that are to be preserved or replaced if a loss occurs. Those structures would receive a Historical Replacement Value valuing the added expense of using hard to find components. We expect the successful firm to have experience in historical building appraisals.

**Question 20.** Is there a specific formula that CIS is intending to utilize or is the valuator's discretion for industry standard/best practice? (new or refurbished).

**CIS Response:** The successful firm is expected to have a formula for valuation of contents.

**Question 21.** Will CIS provide underground piping & instrumentation diagrams (P&ID), layouts, drawings for review?

**CIS Response:** No. The appraiser in the field will acquire what is needed from the member to determine replacement costs.

**Question 22.** Please provide the quantity/square footage of buildings on buildings under \$100,000 threshold.

**CIS Response:** Members may request appraisals on buildings under \$250,000 at the time of appraisal. If members request this work, they can provide quantity and square footage.

**Question 23.** Can the bid due date be extended to 01-29-2021?

**CIS Response:** As noted in Section B above, the deadline for submitting proposals has been extended to January 29, 2021.

**Question 24.** Please provide the grading evaluation weighted factors/percentages assigned to each criteria.

**CIS Response:** The evaluation criteria in Section III(D)(3) of the RFP are not weighted. All will be considered. The criteria are as follows:

- Quality of the proposal, including an expressed understanding of CIS' requirements;
- Qualifications;
- Experience, particularly with similar projects;
- References;
- Staffing & Project Organization;

- Work Plan/Technical Approach;
- Cost Schedule;
- Miscellaneous, including exceptions/deviations.

**Question 25. Authority to do business**

**What type of business or professional licenses are required, if any?**

**CIS Response:** Any licenses required to legally provide appraisal services in the State of Oregon.

**Question 26. Written Agreement**

**Please provide the names of all CIS legal entities to be included as authorized signatories of prime agreement with selected consultant.**

**CIS Response:** Only CIS

**Question 27. Will CIS award entire scope in one agreement/contract or will multiple awards be issued?**

**CIS Response:** We only expect to award the contract to a single firm.

**Question 28. Does Appendix A constitute the entire CIS contract terms & conditions which the consultant is bound to? If not, provide those other terms.**

**CIS Response:** As stated in Appendix A of the RFP, contracts with CIS will be subject to the terms in the appendix, but they are not exclusive and other clauses and provisions will be applicable as well. Proposers are asked in Section V(F) of the RFP to include a sample standard agreement with their proposal, which will be subject to the provisions in Appendix A.

**Question 29. Will CIS contemplate a Force Majeure clause as to the recent nature of travel restrictions due to COVID-19?**

**CIS Response:** Yes, CIS will consider a force majeure clause, but acceptance is up to CIS' discretion.

**Question 30. Will CIS conduct oral presentations?**

**CIS Response:** It is likely CIS will conduct interviews via Zoom with the top responders.

**Question 31. Will there be a client preference for any software utilized throughout the project lifecycle?**

**CIS Response:** No.

**Question 32.** Is there a page limit on our response?

**CIS Response:** No, but as stated in Section V of the RFP, brevity is preferred.

**Question 33.** If awarded, will it be possible to perform a discovery phase prior to June 1st 2021 for items such as;

- As built drawings
- Previous reports
- Equipment lists

**CIS Response:** CIS views this as an important business relationship and will work with the successful firm for a smooth implementation.