



1. Solicitation #: #348C

2. Solicitation Issue Date: 12/05/17

3. Brief Description of Requirement:

Perform appraisal service for Oklahoma Department of Wildlife Conservation related to potential land acquisition using "Yellow Book" process for determining land value. Appraisal shall be performed by a qualified appraiser using the Uniform Standard of Professional Appraisal Practice (USPAP) and Uniform Appraisal Standard for Federal Land Acquisitions (UASFLA aka "Yellow Book").

See additional specification on page 9.

4. Response Due Date¹: 12/19/17

Time: 3:00 PM CST/CDT

5. Issued By and RETURN SEALED BID TO²:

U.S. Postal Delivery Address: P.O. Box 53465
Oklahoma City, Oklahoma 73152

Common Carrier Delivery Address: 2100 NE 37th Street
Oklahoma City, Oklahoma 73111

Electronic Submission Address: cheryl.luetkemeyer@odwc.ok.gov

6. Solicitation Type (type "X" at one below):

- Invitation to Bid
- Request for Proposal
- Request for Quote

7. Contracting Officer:

Name: Cheryl Luetkemeyer
 Phone: 405-521-2097 Fax: 405-522-3486
 Email: cheryl.luetkemeyer@odwc.ok.gov

¹ Amendments to solicitation may change the Response Due Date (read GENERAL PROVISIONS, section 3, "Solicitation Amendments")
² If "U.S. Postal Delivery" differs from "Carrier Delivery", use "Carrier Delivery" for courier or personal deliveries



*"Certification for Competitive Bid and Contract" **MUST** be submitted along with the response to the Solicitation.*

1. **RE: Solicitation #** 348C

2. **Bidder General Information:**

FEI / SSN : _____ Supplier ID: _____

Company Name: _____

3. **Bidder Contact Information:**

Address: _____

City: _____ State: _____ Zip Code: _____

Contact Name: _____

Contact Title: _____

Phone #: _____ Fax #: _____

Email: _____ Website: _____

4. **Oklahoma Sales Tax Permit³:**

YES – Permit #: _____

NO – Exempt pursuant to Oklahoma Laws or Rules – Attach an explanation of exemption

5. **Registration with the Oklahoma Secretary of State:**

YES - Filing Number: _____

NO - Prior to the contract award, the successful bidder will be required to register with the Secretary of State or must attach a signed statement that provides specific details supporting the exemption the supplier is claiming (www.sos.ok.gov or 405-521-3911).

6. **Workers' Compensation Insurance Coverage:**

Bidder is required to provide with the bid a certificate of insurance showing proof of compliance with the Oklahoma Workers' Compensation Act.

YES – Include a certificate of insurance with the bid

NO - Attach a signed statement that provides specific details supporting the exemption you are claiming from the Workers' Compensation Act (Note: Pursuant to Attorney General Opinion #07-8, the exemption from 85 O.S. 2011, § 311 applies only to employers who are natural persons, such as sole proprietors, and does not apply to employers who are entities created by law, including but not limited to corporations, partnerships and limited liability companies.)⁴

Authorized Signature

Date

Printed Name

Title

³ For frequently asked questions concerning Oklahoma Sales Tax Permit, see <http://www.tax.ok.gov/faq/faqbussales.html>

⁴ For frequently asked questions concerning workers' compensation insurance, see <http://www.ok.gov/oid/faqs.html#c221>



NOTE: A certification shall be included with any competitive bid and/or contract exceeding \$5,000.00 submitted to the State for goods or services.

Agency Name: Oklahoma Department of Wildlife Conservation Agency Number: 32000

Solicitation or Purchase Order #: 348C

Supplier Legal Name: _____

SECTION I [74 O.S. § 85.22]:

A. For purposes of competitive bid,

1. I am the duly authorized agent of the above named bidder submitting the competitive bid herewith, for the purpose of certifying the facts pertaining to the existence of collusion among bidders and between bidders and state officials or employees, as well as facts pertaining to the giving or offering of things of value to government personnel in return for special consideration in the letting of any contract pursuant to said bid;
2. I am fully aware of the facts and circumstances surrounding the making of the bid to which this statement is attached and have been personally and directly involved in the proceedings leading to the submission of such bid; and
3. Neither the bidder nor anyone subject to the bidder's direction or control has been a party:
 - a. to any collusion among bidders in restraint of freedom of competition by agreement to bid at a fixed price or to refrain from bidding,
 - b. to any collusion with any state official or employee as to quantity, quality or price in the prospective contract, or as to any other terms of such prospective contract, nor
 - c. in any discussions between bidders and any state official concerning exchange of money or other thing of value for special consideration in the letting of a contract, nor
 - d. to any collusion with any state agency or political subdivision official or employee as to create a sole-source acquisition in contradiction to Section 85.45j.1. of this title.

B. I certify, if awarded the contract, whether competitively bid or not, neither the contractor nor anyone subject to the contractor's direction or control has paid, given or donated or agreed to pay, give or donate to any officer or employee of the State of Oklahoma any money or other thing of value, either directly or indirectly, in procuring this contract herein.

SECTION II [74 O.S. § 85.42]:

For the purpose of a contract for services, the supplier also certifies that no person who has been involved in any manner in the development of this contract while employed by the State of Oklahoma shall be employed by the supplier to fulfill any of the services provided for under said contract.

The undersigned, duly authorized agent for the above named supplier, by signing below acknowledges this certification statement is executed for the purposes of:

the competitive bid attached herewith and contract, if awarded to said supplier;

OR

the contract attached herewith, which was not competitively bid and awarded by the agency pursuant to applicable Oklahoma statutes.

Supplier Authorized Signature

Certified This Date

Printed Name

Title

Phone Number

Email

Fax Number

A. GENERAL PROVISIONS

A.1. Definitions

As used herein, the following terms shall have the following meaning unless the context clearly indicates otherwise:

- A.1.1. "Acquisition" means items, products, materials, supplies, services, and equipment a state agency acquires by purchase, lease purchase, lease with option to purchase, or rental pursuant to the Oklahoma Central Purchasing Act;
- A.1.2. "Addendum" means a written restatement of or modification to a Contract Document executed by the Supplier and State.
- A.1.3. "Bid" means an offer in the form of a bid, proposal, or quote a bidder submits in response to a solicitation;
- A.1.4. "Bidder" means an individual or business entity that submits a bid in response to a solicitation;
- A.1.5. "Solicitation" means a request or invitation by the State Purchasing Director or a state agency for a supplier to submit a priced offer to sell acquisitions to the state. A solicitation may be an invitation to bid, request for proposal, or a request for quotation; and
- A.1.6. "Supplier" or "vendor" means an individual or business entity that sells or desires to sell acquisitions to state agencies.

A.2. Bid Submission

- A.2.1. Submitted bids shall be in strict conformity with the instructions to bidders and shall be submitted with a completed Responding Bidder Information, OMES-FORM-CP-076, and any other forms required by the solicitation.
- A.2.2. Bids shall be submitted to the procuring agency in a single envelope, package, or container and shall be sealed, unless otherwise detailed in the solicitation. The name and address of the bidder shall be inserted in the upper left corner of the single envelope, package, or container. SOLICITATION NUMBER AND SOLICITATION RESPONSE DUE DATE AND TIME MUST APPEAR ON THE FACE OF THE SINGLE ENVELOPE, PACKAGE, OR CONTAINER.
- A.2.3. The required certification statement, "Certification for Competitive Bid and/or Contract (Non-Collusion Certification)", OMES-FORM-CP-004, must be made out in the name of the bidder and must be properly executed by an authorized person, with full knowledge and acceptance of all its provisions.
- A.2.4. All bids shall be legible and completed in ink or with electronic printer or other similar office equipment. Any corrections to bids shall be identified and initialed in ink by the bidder. Penciled bids and penciled corrections shall NOT be accepted and will be rejected as non-responsive. In addition to a hard copy submittal, the bidder will also be required to submit an electronic copy. Electronic responses must be submitted in the identical format contained in the solicitation (for example Microsoft Word, Microsoft Excel, but not Adobe PDF). In the event the hard copy of the price worksheets and electronic copy of the price worksheets do not agree, the electronic copy will prevail.
- A.2.5. All bids submitted shall be subject to the Oklahoma Central Purchasing Act, Central Purchasing Rules, and other statutory regulations as applicable, these General Provisions, any Special Provisions, solicitation specifications, required certification statement, and all other terms and conditions listed or attached herein—all of which are made part of this solicitation.

A.3. Solicitation Amendments

- A.3.1. If an "Amendment of Solicitation", OMES-FORM-CP-011, is issued, the bidder shall acknowledge receipt of any/all amendment(s) to solicitations by signing and returning the solicitation amendment(s). Amendment acknowledgement(s) may be submitted with the bid or may be forwarded separately. If forwarded separately, amendment acknowledgement(s) must contain the solicitation number and response due date and time on the front of the envelope. The procuring agency must receive the amendment acknowledgement(s) by the response due date and time specified for receipt of bids for the bid to be deemed responsive. Failure to acknowledge solicitation amendments may be grounds for rejection.
- A.3.2. No oral statement of any person shall modify or otherwise affect the terms, conditions, or specifications stated in the solicitation. All amendments to the solicitation shall be made in writing by the procuring agency.
- A.3.3. It is the bidder's responsibility to check frequently for any possible amendments that may be issued. The procuring agency is not responsible for a bidder's failure to download any amendment documents required to complete a solicitation.

A.4. Bid Change

If the bidder needs to change a bid prior to the solicitation response due date, a new bid shall be submitted to the procuring agency with the following statement "This bid supersedes the bid previously submitted" in a single envelope, package, or container and shall be sealed, unless otherwise detailed in the solicitation. The name and address of the bidder shall be inserted in the upper left corner of the single envelope, package, or container. SOLICITATION NUMBER AND SOLICITATION RESPONSE DUE DATE AND TIME MUST APPEAR ON THE FACE OF THE SINGLE ENVELOPE, PACKAGE, OR CONTAINER.

A.5. Certification Regarding Debarment, Suspension, and Other Responsibility Matters

By submitting a response to this solicitation:

- A.5.1. The prospective primary participant and any subcontractor certifies to the best of their knowledge and belief, that they and their principals or participants:
 - A.5.1.1. Are not presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded by any Federal, State or local department or agency;
 - A.5.1.2. Have not within a three-year period preceding this proposal been convicted of or pled guilty or had a civil judgment rendered against them for commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a public (Federal, State or local) contract; or for violation of Federal or State antitrust statutes or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, or receiving stolen property;
 - A.5.1.3. Are not presently indicted for or otherwise criminally or civilly charged by a governmental entity (Federal, State, or local) with commission of any of the offenses enumerated in paragraph A.5.1.2. of this certification; and
 - A.5.1.4. Have not within a three-year period preceding this application/proposal had one or more public (Federal, State, or local) contracts terminated for cause or default.
- A.5.2. Where the prospective primary participant is unable to certify to any of the statements in this certification, such prospective participant shall attach an explanation to its solicitation response.

A.6. Bid Opening

Sealed bids shall be opened by the Oklahoma Department of Wildlife located at 2100 NE 37th St., RM 118, Oklahoma City, OK, 73111 at the time and date specified in the solicitation as the Response Due Date and Time.

A.7. Open Bid / Open Record

Pursuant to the Oklahoma Public Open Records Act, a public bid opening does not make the bid(s) immediately accessible to the public. The procurement or contracting agency shall keep the bid(s) confidential, and provide prompt and reasonable access to the records only after a contract is awarded or the solicitation is cancelled. This practice protects the integrity of the competitive bid process and prevents excessive disruption to the procurement process. The interest of achieving the best value for the State of Oklahoma outweighs the interest of vendors immediately knowing the contents of competitor's bids. [51 O.S. § 24A.5(5)]

Additionally, financial or proprietary information submitted by a bidder may be designated by the Purchasing Director as confidential and the procurement entity may reject all requests to disclose information designated as confidential pursuant to 62 O.S. (2012) § 34.11.1(H)(2) and 74 O.S. (2011) § 85.10. Bidders claiming any portion of their bid as proprietary or confidential must specifically identify what documents or portions of documents they consider confidential and identify applicable law supporting their claim of confidentiality. The State Purchasing Director shall make the final decision as to whether the documentation or information is confidential pursuant to 74 O.S. § 85.10. Otherwise, documents and information a bidder submits as part of or in connection with a bid are public records and subject to disclosure after contract award or the solicitation is cancelled.

A.8. Late Bids

Bids received by the procuring agency after the response due date and time shall be deemed non-responsive and shall NOT be considered for any resultant award.

A.9. Legal Contract

- A.9.1. Submitted bids are rendered as a legal offer and any bid, when accepted by the procuring agency, shall constitute a contract.

A.9.2. The Contract resulting from this solicitation may consist of the following documents in the following order of precedence:

A.9.2.1. Any Addendum to the Contract;

A.9.2.2. Purchase order, as amended by Change Order (if applicable);

A.9.2.3. Solicitation, as amended (if applicable); and

A.9.2.4. Successful bid (including required certifications), to the extent the bid does not conflict with the requirements of the solicitation or applicable law.

A.9.3. Any contract(s) awarded pursuant to the solicitation shall be legibly written or typed.

A.10. Pricing

A.10.1. Bids shall remain firm for a minimum of sixty (60) days from the solicitation closing date.

A.10.2. Bidders guarantee unit prices to be correct.

A.10.3. In accordance with 74 O.S. §85.40, ALL travel expenses to be incurred by the supplier in performance of the Contract shall be included in the total bid price/contract amount.

A.11. Manufacturers' Name and Approved Equivalents

Unless otherwise specified in the solicitation, manufacturers' names, brand names, information and/or catalog numbers listed in a specification are for information and not intended to limit competition. Bidder may offer any brand for which they are an authorized representative, and which meets or exceeds the specification for any item(s). However, if bids are based on equivalent products, indicate on the bid form the manufacturer's name and number. Bidder shall submit sketches, descriptive literature, and/or complete specifications with their bid. Reference to literature submitted with a previous bid will not satisfy this provision. The bidder shall also explain in detail the reason(s) why the proposed equivalent will meet the specifications and not be considered an exception thereto. Bids that do not comply with these requirements are subject to rejection.

A.12. Clarification of Solicitation

A.12.1. Clarification pertaining to the contents of this solicitation shall be directed in writing to the Contracting Officer specified in the solicitation, and must be prior to the closing date of the solicitation.

A.12.2. If a bidder fails to notify the State of an error, ambiguity, conflict, discrepancy, omission or other error in the SOLICITATION, known to the bidder, or that reasonably should have been known by the bidder, the bidder shall submit a bid at its own risk; and if awarded the contract, the bidder shall not be entitled to additional compensation, relief, or time, by reason of the error or its later correction. If a bidder takes exception to any requirement or specification contained in the SOLICITATION, these exceptions must be clearly and prominently stated in their response.

A.12.3. Bidders who believe proposal requirements or specifications are unnecessarily restrictive or limit competition may submit a written request for administrative review to the contracting officer listed on the solicitation. This request must be made prior to the closing date of the solicitation.

A.13 Negotiations

A.13.1. In accordance with Title 74 §85.5, the State of Oklahoma reserves the right to negotiate with one, selected, all or none of the vendors responding to this solicitation to obtain the best value for the State. Negotiations could entail discussions on products, services, pricing, contract terminology or any other issue that may mitigate the State's risks. The State shall consider all issues negotiable and not artificially constrained by internal corporate policies. Negotiation may be with one or more vendors, for any and all items in the vendor's offer.

A.13.2. Firms that contend that they lack flexibility because of their corporate policy on a particular negotiation item shall face a significant disadvantage and may not be considered. If such negotiations are conducted, the following conditions shall apply:

A.13.3. Negotiations may be conducted in person, in writing, or by telephone.

A.13.4. Negotiations shall only be conducted with potentially acceptable offers. The State reserves the right to limit negotiations to those offers that received the highest rankings during the initial evaluation phase.

A.13.5. Terms, conditions, prices, methodology, or other features of the bidders offer may be subject to negotiations and subsequent revision. As part of the negotiations, the bidder may be required to submit

supporting financial, pricing, and other data in order to allow a detailed evaluation of the feasibility, reasonableness, and acceptability of the offer.

- A.13.6. The requirements of the Request for Proposal shall not be negotiable and shall remain unchanged unless the State determines that a change in such requirements is in the best interest of the State Of Oklahoma.

A.14. Rejection of Bid

The State reserves the right to reject any bids that do not comply with the requirements and specifications of the solicitation. A bid may be rejected when the bidder imposes terms or conditions that would modify requirements of the solicitation or limit the bidder's liability to the State. Other possible reasons for rejection of bids are listed in OAC 260:115-7-32.

A.15. Award of Contract

- A.15.1. The State Purchasing Director may award the Contract to more than one bidder by awarding the Contract(s) by item or groups of items, or may award the Contract on an ALL OR NONE basis, whichever is deemed by the State Purchasing Director to be in the best interest of the State of Oklahoma.
- A.15.2. Contract awards will be made to the lowest and best bidder(s) unless the solicitation specifies that best value criteria is being used.
- A.15.3. In order to receive an award or payments from the State of Oklahoma, suppliers must be registered. The vendor registration process can be completed electronically through the OMES website at the following link: <https://www.ok.gov/dcs/vendors/index.php>.

A.16. Contract Modification

- A.16.1. The Contract is issued under the authority of the State Purchasing Director who signs the Contract. The Contract may be modified only through a written Addendum, signed by the State Purchasing Director and the supplier .
- A.16.2. Any change to the Contract, including but not limited to the addition of work or materials, the revision of payment terms, or the substitution of work or materials, directed by a person who is not specifically authorized by the procuring agency in writing, or made unilaterally by the supplier, is a breach of the Contract. Unless otherwise specified by applicable law or rules, such changes, including unauthorized written Addendums, shall be void and without effect, and the supplier shall not be entitled to any claim under this Contract based on those changes. No oral statement of any person shall modify or otherwise affect the terms, conditions, or specifications stated in the resultant Contract.

A.17. Delivery, Inspection and Acceptance

- A.17.1. Unless otherwise specified in the solicitation or awarding documents, all deliveries shall be F.O.B. Destination. The supplier(s) awarded the Contract shall prepay all packaging, handling, shipping and delivery charges and firm prices quoted in the bid shall include all such charges. All products and/or services to be delivered pursuant to the Contract shall be subject to final inspection and acceptance by the State at destination. "Destination" shall mean delivered to the receiving dock or other point specified in the purchase order. The State assumes no responsibility for goods until accepted by the State at the receiving point in good condition. Title and risk of loss or damage to all items shall be the responsibility of the supplier until accepted by the receiving agency. The supplier(s) awarded the Contract shall be responsible for filing, processing, and collecting any and all damage claims accruing prior to acceptance.
- A.17.2. Supplier(s) awarded the Contract shall be required to deliver products and services as bid on or before the required date. Deviations, substitutions or changes in products and services shall not be made unless expressly authorized in writing by the procuring agency.

A.18. Invoicing and Payment

- A.18.1. Pursuant to 74 O.S. §85.44(B), invoices will be paid in arrears after products have been delivered or services provided.
- A.18.2. Payment terms will net 45.
- A.18.3. Additional terms which provide discounts for earlier payment will be evaluated when making an award. Additional terms shall be no less than ten (10) days increasing in five (5) day increments up to thirty (30) days. The date from which the discount time is calculated shall be the date of a valid invoice. An invoice is considered valid if sent to the proper recipient and goods or services have been received.

A.19. Tax Exemption

State agency acquisitions are exempt from sales taxes and federal excise taxes. Bidders shall not include these taxes in price quotes.

A.20. Audit and Records Clause

- A.20.1. As used in this clause, "records" includes books, documents, accounting procedures and practices, and other data, regardless of type and regardless of whether such items are in written form, in the form of computer data, or in any other form. In accepting any Contract with the State, the successful bidder(s) agree any pertinent State or Federal agency will have the right to examine and audit all records relevant to execution and performance of the resultant Contract.
- A.20.2. The successful supplier(s) awarded the Contract(s) is required to retain records relative to the Contract for the duration of the Contract and for a period of seven (7) years following completion and/or termination of the Contract. If an audit, litigation, or other action involving such records is started before the end of the seven (7) year period, the records are required to be maintained for two (2) years from the date that all issues arising out of the action are resolved, or until the end of the seven (7) year retention period, whichever is later.

A.21. Non-Appropriation Clause

The terms of any Contract resulting from the solicitation and any Purchase Order issued for multiple years under the Contract are contingent upon sufficient appropriations being made by the Legislature or other appropriate government entity. Notwithstanding any language to the contrary in the solicitation, purchase order, or any other Contract document, the procuring agency may terminate its obligations under the Contract if sufficient appropriations are not made by the Legislature or other appropriate governing entity to pay amounts due for multiple year agreements. The Requesting (procuring) Agency's decisions as to whether sufficient appropriations are available shall be accepted by the supplier and shall be final and binding.

A.22. Choice of Law

Any claims, disputes, or litigation relating to the solicitation, or the execution, interpretation, performance, or enforcement of the Contract shall be governed by the laws of the State of Oklahoma.

A.23. Choice of Venue

Venue for any action, claim, dispute or litigation relating in any way to the Contract shall be in Oklahoma County, Oklahoma.

A.24. Termination for Cause

- A.24.1. The supplier may terminate the Contract for default or other just cause with a 30-day written request and upon written approval from the procuring agency. The State may terminate the Contract for default or any other just cause upon a 30-day written notification to the supplier.
- A.24.2. The State may terminate the Contract immediately, without a 30-day written notice to the supplier, when violations are found to be an impediment to the function of an agency and detrimental to its cause, when conditions preclude the 30-day notice, or when the State Purchasing Director determines that an administrative error occurred prior to Contract performance.
- A.24.3. If the Contract is terminated, the State shall be liable only for payment for products and/or services delivered and accepted.

A.25. Termination for Convenience

- A.25.1. The State may terminate the Contract, in whole or in part, for convenience if the State Purchasing Director determines that termination is in the State's best interest. The State Purchasing Director shall terminate the Contract by delivering to the supplier a Notice of Termination for Convenience specifying the terms and effective date of Contract termination. The Contract termination date shall be a minimum of 60 days from the date the Notice of Termination for Convenience is issued by the State Purchasing Director.
- A.25.2. If the Contract is terminated, the State shall be liable only for products and/or services delivered and accepted, and for costs and expenses (exclusive of profit) reasonably incurred prior to the date upon which the Notice of Termination for Convenience was received by the supplier.

A.26. Insurance

The successful supplier(s) awarded the Contract shall obtain and retain insurance, including workers' compensation, automobile insurance, medical malpractice, and general liability, as applicable, or as required by State or Federal law, prior to commencement of any work in connection with the Contract. The supplier awarded the Contract shall timely

renew the policies to be carried pursuant to this section throughout the term of the Contract and shall provide the procuring agency with evidence of such insurance and renewals.

A.27. Employment Relationship

The Contract does not create an employment relationship. Individuals performing services required by this Contract are not employees of the State of Oklahoma or the procuring agency. The supplier's employees shall not be considered employees of the State of Oklahoma nor of the procuring agency for any purpose, and accordingly shall not be eligible for rights or benefits accruing to state employees.

A.28. Compliance with the Oklahoma Taxpayer and Citizen Protection Act of 2007

By submitting a bid for services, the bidder certifies that they, and any proposed subcontractors, are in compliance with 25 O.S. §1313 and participate in the Status Verification System. The Status Verification System is defined in 25 O.S. §1312 and includes but is not limited to the free Employment Verification Program (E-Verify) through the Department of Homeland Security and available at www.dhs.gov/E-Verify.

A.29. Compliance with Applicable Laws

The products and services supplied under the Contract shall comply with all applicable Federal, State, and local laws, and the supplier shall maintain all applicable licenses and permit requirements.

A.30. Special Provisions

Special Provisions set forth in SECTION B apply with the same force and effect as these General Provisions. However, conflicts or inconsistencies shall be resolved in favor of the Special Provisions.

TABLE OF CONTENTS

A. GENERAL PROVISIONS..... 4

B. SPECIAL PROVISIONS 9

C. SOLICITATION SPECIFICATIONS..... 9

D. EVALUATION 10

E. INSTRUCTIONS TO SUPPLIER..... 10

F. CHECKLIST 11

G. OTHER 11

H. PRICE AND COST 11

B. SPECIAL PROVISIONS

- B.1. Perform appraisal service for Oklahoma Department of Wildlife Conservation (ODWC) related to potential land acquisition using "Yellow Book" process for determining land value. Appraisal shall be performed by a qualified appraiser using the Uniform Standard of Professional Appraisal Practice (USPAP) and Uniform Appraisal Standard for Federal Land Acquisitions (USASFLA aka "Yellow Book").

C. SOLICITATION SPECIFICATIONS

C.1. **Objective:**

The goal is to receive a well-supported opinion of Market Value that is credible, reliable and accurate¹, that conforms to the current versions of the Uniform Standards of Professional Appraisal Practice (USPAP) and to the Uniform Appraisal Standards of Federal Land Acquisition (UASFLA). This SOW will ensure the appraisal product(s) will meet the minimum requirements of the federal regulations implementing the Uniform Relocation Assistance and Real Property Acquisition Policies Act of 1970 (Uniform Act). The report shall reflect, as accurately as possible, the current market conditions and economic supply and demand for the real estate market area. This SOW shall be used for assignment conformity only, and in no way eliminate any requirement as indicated in the current versions of USPAP and UASFLA, and compliance to the Uniform Act.

C.2. **Assignment Identifiers:**

Identification of the Appraisal Purpose/Problem:

The purpose for the appraisal assignment will be to provide opinions of value for certain parcels of property that will be utilized for a land exchange between private landowner Jeff Slatten and the Oklahoma Department of Wildlife Conservation (Department). The proposed conveyance of Slatten owned property consists of 636 acres in two approximately 318 acre non-aliquot and non-contiguous parcels of land that are both adjacent to the BRWMA. One parcel is located to the northeast of the BRWMA, while one parcel is located to the southcentral of the BRWMA.

The Department owned property is a surveyed 623.5755 acre non-aliquot parcel that is located in close proximity to the north of the town of Beaver, OK. It is part of a larger 5,733.81 acre McFarland Ranch, originally acquired December 17, 2010, under the Beaver River Wildlife Management Area (BRWMA).

C.3. **Identification of the Client:**

The Client of the report the Oklahoma Department of Wildlife Conservation.

C.4. **Identification of the Intended User(s):**

Intended Users of this report shall include Mr. Jeff Slatten, the Oklahoma Department of Wildlife, and the U. S. Fish & Wildlife Service (Service). The names of the Client(s) and Intended User(s) shall be stated within the body of the appraisal report.

C.5. **Identification of the Intended Use of the Appraisal:**

The intended use of the appraisal report(s) is to facilitate the negotiations of willing landowners to exchange property rights in real property by providing opinions of value towards a determination of just compensation in an open arms-length transaction.

C.6. **Identification of the Type of Opinion:**

The purpose of the appraisal(s) is to provide an estimate of Market Value as it applies to the appraisal problem. The correct definition of Market Value utilized shall be:

Market value is the amount in cash, or on terms reasonably equivalent to cash, for which in all probability the property would have sold on the effective date of value, after a reasonable exposure time on the open competitive market, from a willing and reasonably knowledgeable seller to a willing and reasonably knowledgeable buyer, with neither acting under any compulsion to buy or sell, giving due consideration to all available economic uses of the property.²

Since the UASFLA definition of market value is already assuming a "reasonable exposure time on the open competitive market," any opinion of exposure time must invoke a Jurisdictional Exception to USPAP. The appraiser may make a Hypothetical Condition that assumes the Department lands to be disposed of are privately owned and available for sale in the open, market, thereby excluding the remaining Department land of the BRWMA from the Larger Parcel determination. The Client must approve the appraiser's use of any other Hypothetical Condition or Extraordinary Assumption, in advance.

C.7. **Identification of Effective Date:**

The Effective Date of the appraisal(s) shall be the date of the last site-inspection of the properties. The appraiser must physically inspect the properties. The appraiser must physically inspect the properties. The appraiser shall make every opportunity to give representative of Mr. Slatten, the Department and the Service an opportunity to accompany the appraiser during the site inspection of the subject sites.

C.8. **Identification of Relevant Characteristics of the Subject Properties:**

The appraiser must adequately incorporate all attributes of the properties to be exchanged into a comprehensive study of the physical, legal, and economic characteristics of the subject properties as well as the neighborhood and market in which they are located. This shall include all characteristics of the properties that are the Larger Parcel.

C.9. **Identification of Interest(s) to be Appraised:**

The land exchange of the properties will include the total of all property rights currently held by the respective landowner, surface rights only.

¹ Uniform Appraisal Standards for Federal Land Acquisitions 2016 (UASFLA), 1.1 page 8

² UASFLA, 1.2.4 page 10

C.9. Identification of the Legal Description:

The Department is acquiring 636 acres in two parcels that are adjacent to the BRWMA:

- 1) The northeast tract contains an estimated 318 acres located off Beaver Rd, approximately 2.5 miles west from Highway 23. There is an estimated 160 acres located in Section 33, T.5.N., R.23.E, while roughly 158 acres is in Section 34, T.5.N., R.23.E., both in the Cimarron Meridian and Base Line.
- 2) The southcentral tract contains an estimated 318 acres located off Hollow Rd, 7.6 miles from Highway 23 in Beaver. There is an estimated 160 acres located in Section 15, T.4.N., R.22.E, while roughly 158 acres is in Section 14, T.4.N., R.22.E., both in the Cimarron Meridian and Base Line.

Both parcels include surface rights only. Title to this interest in real property will vest with the Department.

Mr. Slatten will be acquiring a non-aliquot parcel containing 623.5755 surveyed acres located in Section 11, T.4.N., R.22.E., Cimarron Meridian and Base Line. The parcel includes on the surface rights.

C.10. Data Requirements

The due diligence for the assignment shall encompass all Data Collection requirements per UASFLA 1.3. The following sections are offered as additional guidance for the appraisal assignment:

- C.10.1. Larger Parcel** - The appraiser must make a determination of the Larger Parcel. The Larger Parcel shall take into account all relevant characteristics of the properties to clearly and thoroughly apply the unity of ownership, unity of use and contiguity of the properties. The Department owned 623.5755 surveyed acres is partitioned out of a larger McFarland Ranch of the BRWMA, which will not be included in the land exchange. As such, the appraiser may make a variance to the Larger Parcel determination of that parcel to include only that 623.5755 acres identified to be disposed of by the Department.
- C.10.2. Highest and Best Use** - The appraiser must make a Highest and Best use determination for the properties. The appraiser must clearly and thoroughly examine all uses for legality, physically possible financially feasible and maximally productive. The highest and best use of the properties may or may not be the existing use. The highest and best use must be an economic use.
- C.10.3. Approaches to Value** - The Sales Comparison Approach, the Income Approach and the Cost Approach values must all be considered. If any one of these approaches are not used the appraiser must state why it was excluded.
- C.10.4. Appraisal Report** - The written report(s) will, at minimum, comply with Standard Rule 2-2(a) of USPAP for an "Appraisal Report," and Section 2.2 of UASFLA, as applicable. The report(s) shall contain sufficient economic and market analyses to support conclusions and opinion(s) of value; subject properties and comparable sales location maps; and color photographs of the subject properties.

The report(s) shall also include written comparable data sheets for each comparable sale analyzed in the appraisal. The comparable sales will be verified with a party(s) knowledgeable of specifics to the real estate transaction. Marketing time for each transaction will be included in comparable data sheets. The appraisal(s) will reflect prevailing market conditions and will be performed based upon transactions preferably within the last three (3) years in competitive areas. A "Market Data Grid" shall be included and adjustments to the comparable sales shall be market supported and explained.

Data that may be contained in the comparable data sheets may include, but not limited to:

- C.10.4.1. Name of the Buyer and Seller
- C.10.4.2. Date of Sale
- C.10.4.3. Legal Description
- C.10.4.4. Type of Sale Instrument
- C.10.4.5. Document Recording Information, i.e., Book and Page or Assessor's Parcel Number
- C.10.4.6. Price
- C.10.4.7. Terms of Sale
- C.10.4.8. Location
- C.10.4.9. Zoning
- C.10.4.10. Present Use
- C.10.4.11. Highest and Best Use
- C.10.4.12. Brief Physical Description of the Property
- C.10.4.13. Photograph of Sale Property
- C.10.4.14. Plot, Plan or Sketch of each comparable property
- C.10.4.15. Comparable Sales Map showing the relative location of the comparable sales to the property under appraisal.

This information may be summarized for each sale on a comparable sales form (market data sheet) and included in the Sales Comparison Approach section of the report or in the addenda of the report. Inclusion of a copy of the transfer document (e.g., deed, contract) in the report is neither required nor desirable, unless there is something in the document that is unusual or particularly revealing. The appraiser is responsible for securing any pertinent sales information, and copies of factual material on flood plains, taxation, assessments and other factual data as required in USPAP.

D. EVALUATION

- D.1. All responses to this solicitation will be reviewed to determine the award based on "Best Value" evaluation method.

E. INSTRUCTIONS TO SUPPLIER

- E.1. All questions about this ITB must be directed IN WRITING by way of email to the Contracting Officer:

Cheryl Luetkemeyer, Contracting Officer
Email: cheryl.luetkemeyer@odwc.ok.gov

All questions concerning this ITB must be submitted in writing by way of email the Contracting Officer no later than **December 14, 2017, at 4:30pm CST.** No questions other than written and no questions after deadline of question submission will be accepted, reviewed or answered. No responses other than written will be binding upon the State.

- E.2.** All requested appraisal to be completed within 60 day period after pre-work meeting (teleconference), scheduling of teleconference will take place within 10day of issuance of contract to awarded vendor.
- E.3. This to be included as part of the Uniform Standards of Professional Appraisal Practice and Uniform Appraisal Standards for Federal Land Acquisitions Report:**
 - Identification of the agency client and intended users of the review report
 - E.3.1. Oklahoma Department of Wildlife Conservation, United State Fish and Wildlife Service, and Mr. James Slatten
 - E.3.2. Experience and qualifications required include: General Certified Appraiser licensing per Oklahoma Law; appraisal experience in rural area of Oklahoma; and knowledge and the experience required to perform appraisals to UASFLA specifications.
 - E.3.3. All work shall be performed by or under the direct supervision of a person licensed as a General Certified Appraiser in Oklahoma.
 - E.3.4. **Direct supervision** means the State Certified General Appraiser will be at the project site to supervise and shall aid in analyses and writing of the tree approaches to value and perform the inspection of the subject and comparable sales properties.
 - E.3.5. All work performed by non-General Certified Appraisers must be reviewed and approved by the Certified General Appraiser prior to submission of the appraisal report.
- E.4.** A pre-work meeting (teleconference) may be scheduled at the beginning of the appraisal process with the Appraiser, Reviewer, Client and Intended Users. The purpose shall be to clarify any and all issues pertaining to the scope of work, appraisal process, obtaining and review of maps and legal descriptions, the preparation of the appraisal report, and the reporting requirements for the acquisition.
- E.5.** Appraiser must submit verification of errors and omissions insurance, a copy of his/her State Certified General Appraisal license and number, and Qualification Statement.
- E.6.** Appraisal to be conducted after the completion of all surveys. The anticipated start date is after January 15, 2018.
- E.7.** Provide land values in dollar amounts per acre price
- E.8.** Four color hard copies of the appraisal need to be provided and electronic file provided on a cd.

F. CHECKLIST

- F.1.1.** OMES Form CP 076 - Responding Bidder Information
- F.1.2.** OMES Form CP 004 - Certification for Competitive Bid and/or (Non-Collusion Certification)
- F.1.3.** Proof of Liability and Worker's Compensation Insurance

G. OTHER

G.1. Mandatory Vendor Registration for Contract Award - Vendors will not be required to register to submit a response to a solicitation but if a vendor is the highest scoring candidate and desires to conduct business with the state, they will be required to register with the Department of Central Services prior to being awarded a contract. By registering with the State, suppliers will be automatically notified of bidding opportunities for the commodities for which they register. Vendors may register by visiting the Online Vendor Registration page at <https://www.ok.gov/dcs/vendors/index.php/>

H. PRICE AND COST

Appraisal Service - "Yellow Book" Process

- H.1.** To include the performance of an appraisal service for ODWC related to potential land acquisition using "Yellow Book" process for determining land value. Appraisal shall be performed by a qualified appraiser using the Uniform Standard of Professional Appraisal Practice (USPAP) and Uniform Appraisal Standard for Federal Land Acquisitions (USASFLA aka "Yellow Book") as described in Section E.
- H.2.** Invoice can be submitted at the time the appraisal is submitted. The cost of the appraisal shall include any revisions needed if appraisal submitted acceptable-level fails based on review by the desktop reviewer, the Department and/or the Service.

Total Bid Price: \$ _____