

February 22, 2018

**RFQ No. 1
California WaterFix Real Estate Services**

ADDENDUM NO. 2

This Addendum is meant to address Questions and Answers to the Real Estate Services Request for Qualifications (RFQ) No. 1, as originally posted on January 26, 2018.

Please note that the date to submit SOQs has been changed. The SOQs must be received by 2:00 pm on Friday, March 9, 2018.

The following questions have been received from prospective Consultants. The questions are immediately followed by the responses.

Q1. Page 4, Section 1.9 Minimum Qualifications - Principal /PM must have a valid Brokers license, but applies to Sections 2.2.1 & 2.2.2 only. Would this imply that the lead for the acquisition services should be a Broker, or is this a requirement for the Principal and the Project Manager?

A1. The Principal/Program Manager for acquisition services as specified in sections 2.2.1 and 2.2.2 shall have a valid California Real Estate Broker's License.

Q2. Page 5, Section 1.9 Minimum Qualifications - #4 states Respondent's appraisers shall have a valid California Certified General Appraiser License and a designation of Accredited Rural Appraiser. Does this mean that every appraiser working on this project MUST have the Rural Appraiser accreditation? Or will there be some properties appraised that do not require this accreditation?

A2. Not every appraiser must have the Accredited Rural Appraiser designation. Respondent and/or their sub-consultant(s) must have a valid California Certified Appraisal License. The Accredited Rural Appraiser designation may be substituted with evidence of 5-years of appraisal experience in which three (3) were in rural appraisal.

Q3. Page 5, Section 1.10 Key Personnel - key personnel are defined as "those that will be interfacing with property owners, drafting documents, preparing appraisals, or any non-clerical tasks" and "those individuals that will be supervising the accomplishment of these tasks". Under this definition, every acquisition and relocation agent working with property owners would appear to be defined as key personnel. Can you clarify this definition?

A3. Respondent should identify the Principal/Project Manager and other personnel performing key functions for the services for which they are responding to under this RFQ. The list of key personnel provided in section 1.10 is a representative sample of the types of functions that may be considered.

- Q4. Page 5, Section 1.10 Key Personnel - States that "Respondent's appraisers shall have a valid California Certified General Appraiser License and a designation of Accredited Rural Appraiser." Does this requirement apply to review appraisals? Could appraisers without the designation of Accredited Rural Appraiser review the fee appraisals?**
- A4. Appraisers without the designation of Accredited Rural Appraiser can review the appraisal. However, all appraisers shall possess a California certified appraiser license and follow Uniform Standards of Professional Appraisal Practice.
- Q5. My hesitation is that I do not hold the designation of Accredited Rural Appraiser which the RFQ states is a requirement. Is there any leniency with respect to this?**
- A5. See A2.
- Q6. Is there any leniency with the having to hold the designation of Accredited Rural Appraiser?**
- A6. See A2.
- Q7. Does the respondent need to have at least 1 (one) appraiser with the designation of accredited Rural Appraiser (ARA), or do all appraisers need this designation?**
- A7. See A2.
- Q8. Is there a requirement that all appraisers used as subconsultants have a specific certification or designation?**
- A8. See A2.
- Q9. Page 10, Section 2.2.8 Program Management - Is the services required Program Management, Project Management, or both?**
- A9. Section 2.2.8 outlines the types of management functions for real estate services requested under this RFQ.
- Q10. Page 11, Section 2.4 Location of Services - Key personnel will be required to regularly with the CWF program office in the greater Sacramento area. The previous RFP had a requirement to establish a local office in Sacramento, is this no longer a requirement?**
- A10. The Project Manager will be required to work out of the Program's Sacramento office for a minimum of one day per week, with additional time in the Sacramento office dictated by, but not limited to, specific Program priorities, schedules, meetings, and deliverable requirements. Other key personnel may be required to regularly meet in the Program office in the greater Sacramento area as necessitated by work tasks.
- Q11. Page 13, Section 3.2 Record of Past Performance - #1 states: ""Cite two relevant projects that best demonstrate experience for the required services. For each, provide a project overview...." Page 17 & 18, Section 4.1 Response Requirements D. Firm Performance & Experience "...choose three projects from those cited**

above that best demonstrate your firm's qualifications and provide a detailed description of each...."

Do we need to elaborate on two projects or three to fulfill the requirements of both Section 3, Evaluation Criteria and the Section 4, Statement of Qualifications Instructions?

A11. Two projects as specified in Section 3.2.

Q12. Page 13, Section 3.2 Record of Past Performance - asks for a very detailed description of two reference projects with points A-G outlining questions regarding services provided. Pages 17-18 under D. Firm Performance and Experience ask for 3 project examples with no reference to the information listed on page 13. Please clarify a) the required number of project references (2 or 3?) and b) what information to provide for these references – outlined in the Evaluation Section or in the SOQ Instructions Section.

A12. See A11 and A19.

Q13. Page 14, Section 3.5 Fee Schedule / Attachment G - Should all teams use the same three personnel titles in order to make the rates comparable between teams? The Executive Director RFQ has these title filled in.

A13. The fee schedule attachments shall include list of key personnel titles and current hourly rates to assist in the RFQ evaluation process. Key personnel may differ between submittals depending on specific Real Estate services being offered. For the purposes of this attachment, key personnel are not limited to 3 people. See revised Attachment G below.

Q14. Attachment G: Fee Schedule - has 3 places for key personnel. Is key personnel limited to 3 people, or should we include multiple attachment G sheets?

A14. See A13.

Q15. Attachment G Fee Schedule - We are to list the title, name, classification, etc, of key personnel. There are 3 spaces for key personnel. May we have more than 3 key personnel? If so, will this lower our score on the fee schedule portion of the scoring?

A15. See A13.

Q16. What three Key Personnel positions should be used on Attachment G Fee Schedule? It seems that all submitting teams should use the same positions.

A16. See A13.

Q17. Page 17, Section 4.1, subsection B Executive Summary - First bullet point reads: Include an specialized experience or other credentials relating to providing Geotechnical Engineering Services during design phase. Is this a typo? Should it read right of way acquisition services?

A17. Section 4.1, subsection B Executive Summary - First bullet point is revised as follows:

“Identify the project role of each of the proposed key staff/team members and subcontractors and their credentials for serving that role. Include any specialized experience or other credentials related to providing real estate services for large infrastructure projects.”

Q18. Page 17, Section 4.1, subsection B Executive Summary - says, “Include any specialized experience or other credentials related to providing geotechnical engineering services during design phase.” Please confirm that this verbiage doesn’t apply to the current RFP.

A18. Correct. See A17.

Q19. Page 17, Section 4.1, subsection D Firm Performance and Experience - says, “Specifically, this referenced work experience shall be related to major infrastructure facilities constructed under multiple construction contracts.” Please confirm that this verbiage doesn’t apply to the current RFP.

A19. Section 4.1, subsection D Firm Performance and Experience is revised as follows:

“Respondent shall describe in detail their firm’s qualifications and past experience that demonstrates the ability of the Respondent and their sub-contractors to perform work similar in scope and size to that required in this RFQ.

Each Respondent and sub-contractor shall provide a listing of past and pending litigation or claims within the last ten years.

Respondent shall cite two projects worked on within the last 10 years that are most relevant to the services requested under this RFQ. For each provide the project title, a brief narrative/description, and indicate the firm’s role (Lead firm, sub-contractor, support, etc.), and services provided. Identify your firm’s responsibilities, problems/issues encountered and solutions recommended. Please include such information necessary to be responsive to Section 3 and as listed below:

- Client firm and/or agency and name of principal contact
- Client contact information (address, phone number, email address)
- Names of key personnel of Respondent’s team that participated on the named projects and their specific responsibilities

The Authority may contact these references; please provide only those with which contact will be allowed.”

Q20. Page 5 of the RFQ, 1.11 Small and/or Disabled Veteran Business Enterprise (SBE/DVBE) Incentive - #3 states that the 5% max. incentive will only be given to the Prime Respondent that qualifies.” – nothing about the sub-consultant. I would just like to verify that sub-consultants being a DVBE or an SBE will not qualify for the maximum 5% incentive? In other words that it is only the Prime that qualifies. The previous RFP did, which is why I’m just asking for clarification.

A20. Correct. Only the Prime qualifies for the SBE/DVBE incentive.

- Q21. Page 15, Section 3.6 Small and/or Disabled Veteran Business Enterprise (SBE/DVBE) Incentive Notes that 5% award is only for primes with the designation. Is there credit for having DVBE's/SB's on the team?**
- A21. No.
- Q22. Page 15, Section 3.6 Small and/or Disabled Veteran Business Enterprise (SBE/DVBE) Incentive states that primes who qualify as SBE or DVBE will be awarded 5 percentage points toward total number of evaluation points. However, on Attachment I respondents participation form, it states "list all parties" providing services and we need to identify percentage of proposed cost coming from SBE or DBVE. So, if we have subconsultants who are SBE or DVBE, will this be counted toward the evaluation points?**
- A22. No, only the Respondent who qualifies for SBE/DVBE status will receive the SBE/DVBE incentive.
- Q23. Does the Authority require that we complete a documented good faith effort for SBE, DVBE participation?**
- A23. No.
- Q24. Is the Small business/DVBE policy for this Real Estate RFQ the policy for all going forward?**
- A24. The policies for any future RFQ's will be outlined in each individual RFQ.
- Q25. What is the future RFP goal for SBE/DVBE?**
- See A24.
- Q26. Why does the Real Estate Services RFQ and the Executive Director RFQ only include an incentive if the prime is a SBE or DVBE?**
- A26. Past California Water Fix RFQ's issued have included an incentive if the prime or subcontractors are SBE or DVBE. SBE/DVBE policies are the same for all current RFQ's.
- Q27. Will there be credit awarded for having a DVBE/SB on your team? Currently, only the prime that is a DVBE/SB would receive the 5% credit.**
- A27. No. Only the prime who qualifies for SBE/DVBE status will receive the 5% credit.
- Q28. What is the SWPCA's small business/DVBE goal for the California WaterFix?**
- A28. Please note that the design and construction of California WaterFix will be managed under contract with the Department of Water Resources (DWR) through a proposed Delta Conveyance Design and Construction Joint Powers Authority (the Authority), not SWPCA. The Authority, once formed, will adopt SWPCA SBE/DVBE policies. It is anticipated that those policies will be substantially similar to the policy outlined in Attachment A, Sample Agreement, Terms of Agreement, Item 10.

Q29. Page 18, Section 4.1, subsection D Firm Performance and Experience - Third bullet points reads: Dates during which the respondent provided executive leadership services. Is this a typo? Should it read right of way acquisition services?

A29. See A19.

Q30. Page 18, Section 4.1, subsection D Firm Performance and Experience - Sixth bullet point reads: Provide examples of Respondent's expertise in providing executive leadership services to clients on major infrastructure projects similar to the services requested under this RFQ. Is this a typo? Should it read, right of way acquisition services?

A30. See A19.

Q31. Page 18, Section 4.1 Response Requirements D/E Language is for the Executive Director Leadership experiences, not Right of Way. Was this a carryover from the Executive Director RFQ?

A31. See A19 and A32.

Q32. Page 18, Section 4.1, subsection E Personnel Performance and Experience - the phrase "executive director leadership" is used. Will this phrase be deleted?

A32. Section 4.1, subsection E "Personnel Performance and Experience" is revised as follows:

"This section shall describe in detail the relevant experience and qualifications of each Key Personnel. Respondent shall describe its personnel's qualifications, including professional licenses, certifications, and relevant experience that demonstrates the ability of the personnel to perform work similar in scope and size to that required in this RFQ. Specifically, this referenced work experience shall be related to experience in providing real estate services similar in scope and size to that required in this RFQ."

Q33. Page 18, Section 4.1, subsection D Firm Performance and Experience - Paragraph 3 of the RFP states: "For each proposed subcontractor, provide a description of at least three programs/projects that are similar to those described in Attachment A Scope of services within the past 10 years, specific to their proposed responsibilities on this contract. Attachment A" in this SOQ is a Sample Contract, did the Authority meant to say, "Section 2: Scope of Services"?

A33. See A19.

Q34. Page 18, Section 4.1, subsection D Firm Performance and Experience - third bullet point, top of the page, "Dates during which the Respondent provided executive leadership services" – please clarify this reference to the executive leadership services.

A34. See A19.

Q35. Page 18, Section 4.1, subsection D Firm Performance and Experience - Provide specific project details, including overall project/program budgets/costs for design phase of work, construction contract values, program/project duration (initial and final durations for design and construction phases), and total contract amount of work performed under the direction of your firm.” A right of way consultant might not have access to contract costs/budgets for such phases as design and construction. Please consider removing this verbiage.

A35. See A19.

Q36. Page 18, Section 4.1, subsection E Personnel Performance and Experience - says, “Specifically, this referenced work experience shall be related to experience in providing Executive Director leadership services for large infrastructure projects constructed under multiple construction contracts.” Please confirm that this verbiage doesn’t apply to the current RFP.

A36. See A32.

Q37. Page 18, Section 4.1, subsection E Personnel Performance and Experience Reads: This section shall describe in detail the relevant experience and qualifications of each Key personnel. Respondent shall describe its personnel's qualifications, including professional licenses, certifications, and relevant experience that demonstrate the ability of the personnel to perform work similar in scope and size to that required in this RFQ. Specifically, this referenced work experience shall be related to experience in providing Executive Director Leadership services for large infrastructure projects constructed under multiple construction contracts. Is this a typo? Should it read right of way acquisition services?

A37. See A32.

Q38. Please explicitly state whom the Authority considers to be “Key Personnel” as related to this RFP. Is it a Project Manager only? If not, please state other positions that are to be considered a Key Person and are to be addressed in E. Personnel Performance and Experience and listed on Attachment G: Fee Schedule.

A38. See A13.

Q39. Page 19, Section 4.1, subsection E Personnel Performance and Experience reads, Fifth bullet point reads, Provide examples of Key Personnel's expertise in providing executive director leadership services to clients on major infrastructure projects similar to the services requested under this RFQ. Is this a typo? Should it read, right of way acquisition services?

A39. See A32.

Q40. Page 19, Section 4.1, subsection E Personnel Performance and Experience - For each Key Personnel, please choose three projects from those cited above that best demonstrate their qualifications ... “ In providing project examples for each

Key Personnel must we provide three of the five (maximum allotted) project examples provided? Could we include other project examples?

A40. See A32.

Q41. The RFP states that the “RE Project Manager shall be located on a full time basis in the Sacramento area and available to attend weekly meeting[s] with program Management”, however it was indicated in the kickoff meeting that as long as the Project Manager is able to attend all meetings, location will not be an issue. Is there an official requirement that a Project Manager be located in the greater Sacramento area on a full-time basis?

A41. See A10.

Q42. The RFP indicates that the respondents must maintain a database with real time status of real estate transactions by parcel and that it will need to interface with the Authority’s program management tracking. What program management tracking system does the Authority plan to use for this project?

A42. The Authority's program management tracking system has not been established as yet. Respondent shall simply indicate the system or method of tracking they propose to use with an understanding the Authority may work with them to synch communications later.

Q43. Does the Authority consider hiring a recipient of CalPERS, a former state or DWR employee a conflict of interest?

A43. No.

Q44. Attachment F Employment of Active or Retired CalPERS Members requests that the CALPERS identification number be provided. This is personal information being provided on a public document. Could this information be withheld from the SOQ and provided if awarded a contract?

A44. The Authority will keep all proposal submitted under this RFQ secure and will take any steps permitted by law to prevent the dissemination of the CALPERS identification number.

Q45. Are any environmental services included within the Right of Way Scope?

A45. No.

Q46. Will environmental mitigation acquisition also be included in the R/W Services?

A46. Yes.

Q47. Will Environmental Site Assessments (ESAs) Phase 1/Phase 2 services be a potential service item, or would that work be handled under another service contract?

A47. Environmental Site Assessments are not included as part of this solicitation.

Q48. Does the Authority acknowledge the number of contracts they intend to award in response to this proposal process?

A48. There is no pre-determined number of contracts that will be awarded through this RFQ.

Q49. There has been discussion regarding a change to the scope of work. What is the status of the scope of work? When will the parcel list be available?

A49. The scope of work remains as outlined in the RFQ. A list of parcels is not available. Alignment maps for the California WaterFix project are provided in the 2016 Final BDCP/California WaterFix EIR/EIS, Volume 1, Chapter 3-Mapbook Figures, Figure M3-4: Index -Modified Pipeline/Tunnel Alignment (Alternatives 4, 4A). See BDCP/California WaterFix website at: www.baydeltaconservationplan.com.

Q50. Attachment G: Fee Proposal and Attachment I: Respondents Participation Form require an RFQ Number (No.) Page i of the Table of Content says RFQ No. 1 and page 1 of the RFQ, Section 1.1, Submission of Statement of Qualifications #2 states, "Envelopes should be clearly labeled: "Statement of Qualifications, No. 2 DO NOT OPEN UNTIL...." Is it RFQ No. 1 or RFQ No. 2?

A50. RFQ No. 1.

Q51. What form should we use to submit pricing for our subconsultants such as appraiser, review appraiser, and title company?

A51. The RFQ did not provide a specific form that is required to be used. See Attachment G: Fee Schedule in the RFQ.

Q52. How should the rates for our subs (appraisal, title) be submitted – for example, appraisals are usually based on a unit cost and not hourly.

A52. RFQ requests fee schedules for all classifications of personnel that will be working on the project. If certain services are provided on a unit cost basis, please provide such information as necessary for evaluation of costs.

Q53. Will there be maps or a parcel list released so respondents can address potential issues in our approach in this proposal?

A53. A list of parcels is not available. Alignment maps for the California WaterFix project are provided in the 2016 Final BDCP/California WaterFix EIR/EIS, Volume 1, Chapter 3-Mapbook Figures, Figure M3-4: Index -Modified Pipeline/Tunnel Alignment (Alternatives 4, 4A). See BDCP/California WaterFix website at: www.baydeltaconservationplan.com

Q54. When will the parcel list be available?

A54. See A53.

Q55. Several sections of the RFQ were noted as requiring edits at the pre-bid meeting, as the language was for the Executive Director RFQ and the Geotech RFQ. We had also asked for clarification for the Broker requirement for the Principal/Project Manager. These were to be addressed with the responses to comments to be released on February 22. The deadline for delivery is March 2, the following week. As the answers to this question as well as the rewrite of the RFQ may impact the entire structure of the team and the SOQ, would it be possible to extend the deadline to the following Friday, March 9th?

A55. Yes. The deadline will be extended to March 9th.

Q56. Please confirm that on Attachment E: Potential Conflicts of Interest Acknowledgement that items numbered 1 through 5 are representative of what may be asked, and nothing that is to be filled out or responded to for the submission of the RFQ.

A56. Correct.

Q57. Could I obtain a plan holders list?

A57. The question is unclear and no response is provided.

Additional Revisions:

1. Attachment G has been revised.

Attachment G: FEE SCHEDULE

RFQ No: _____

RFQ Title: Real Estate Services _____

Prime Consultant Name: _____

Respondent shall provide fee schedules for all classifications of personnel that will be working on the project in a separate attachment. In addition, the Respondent shall provide the information requested in the table below for the Key Personnel listed in the proposal.

Key Personnel Title	Name of Key Personnel	Key Personnel Classification	Unburdened Hourly Rate	Indirect Cost %	Profit %	Total Burdened Rate*
1.						
2.						
3.						

***The fully burdened rate should be calculated as follows: Unburdened Hourly Rate +(Unburdened Hourly Rate x Indirect Cost %) = Subtotal.
Subtotal + (Subtotal x Profit %) = Fully Burdened Rate.**