

REQUEST FOR QUALIFICATIONS

**APPRAISALS AND APPRAISAL-RELATED
SERVICES**

THE SCHOOL BOARD OF MIAMI-DADE COUNTY, FLORIDA

PROPOSAL RETURN DATE

June 29, 2006

RFQ NO. 113-FF10

THE SCHOOL BOARD OF MIAMI-DADE COUNTY, FLORIDA
PROCUREMENT MANAGEMENT SERVICES
1450 N.E. 2ND AVENUE, MIAMI, FLORIDA 33132
REQUEST FOR QUALIFICATIONS NO. 113-FF10

APPRAISAL AND APPRAISAL RELATED SERVICES

Sealed Requests for Qualifications will be accepted in Procurement Management, at the above location, until **2:00 P.M., Local Time**, June 29, 2006, and may not be withdrawn for one hundred-twenty (120) days from that date.

ANTI-COLLUSION STATEMENT

THE UNDERSIGNED PROPOSER HAS NOT DIVULGED TO, DISCUSSED, OR COMPARED HIS PROPOSAL WITH OTHER PROPOSERS AND HAS NOT COLLUDED WITH ANY OTHER PROPOSER OR PARTIES TO THE PROPOSAL WHATSOEVER. PROPOSER ACKNOWLEDGES THAT ALL INFORMATION CONTAINED HEREIN IS PART OF THE PUBLIC DOMAIN AS DEFINED BY THE STATE OF FLORIDA SUNSHINE LAW.

CERTIFICATION AND IDENTIFICATION FOR APPRAISERS SUBMITTING QUALIFICATIONS.

I certify that this proposal is made without prior understanding, agreement or connection with any corporation, firm or person submitting a proposal for the same service, and is in all respects fair and without collusion or fraud. I agree to abide by all conditions of these proposal specifications and I certify that I am authorized to sign this proposal.

(Please Type or Print Below)

LEGAL NAME OF AGENCY OR
CONTRACTOR SUBMITTING QUALIFICATIONS: _____

MAILING ADDRESS: _____

CITY STATE, ZIP CODE: _____

TELEPHONE NUMBER: _____

BY: SIGNATURE _____

BY: TYPED _____

TITLE: _____

INSTRUCTIONS TO AGENCY/APPRaiser SUBMITTING QUALIFICATIONS

I. PREPARING OF QUALIFICATIONS

- A. THE QUALIFICATIONS ARE TO BE SUBMITTED, using 8-1/2" x 11" paper.
- B. IDENTIFICATION. Failure to indicate the contractor's EXACT legal name and an unsigned proposal may be considered non-responsive.

II. SUBMITTING OF PROPOSALS

- A. Number of Requests for Qualifications:

A total of four (4) copies of the Qualifications must be submitted as follows:

- * The original qualifications in a sealed envelope or box marked "Original."
- ** Three (3) copies of the qualifications in a separate sealed envelope or box marked "Copies."

The qualification number, qualification title and opening date must be clearly marked on all envelopes and boxes.

- B. Place, Date and Hour. Proposals shall be submitted to The School Board of Miami-Dade County, Florida, Procurement Management Services, Room 352, 1450 N.E. 2nd Avenue, Miami, Florida, not later than 2:00 P.M., Local Time, June 29, 2006.

III. CHANGE OR WITHDRAWAL OF PROPOSAL

- A. PRIOR TO QUALIFICATION OPENING. Should the agency or individual contractor withdraw its request for qualifications, they shall do so in writing. This communication is to be received by the Assistant Superintendent, Procurement Management Services, 1450 N.E. 2nd Avenue, prior to June 29, 2006. The agency or individual contractor's name and the request for qualifications number should appear on the envelope.
- B. AFTER QUALIFICATION OPENING. After June 29, 2006, qualification submittal may not be changed; and they may not be withdrawn for one hundred twenty (120) days from that date.

IV. PROTEST TO CONTRACT SOLICITATION OR AWARD

- A. The Board shall provide notice of a decision or intended decision concerning a solicitation, pre-qualification award, or exceptional purchase by electronic posting. This notice shall contain the following statement:

“Failure to file a protest within the time prescribed in § 120.57(3), Florida Statutes, shall constitute a waiver of proceedings under Chapter 120, Florida Statutes.”

- B. Any person who is adversely affected by the agency decision or intended decision, shall file with the agency a notice of protest in writing within 72 hours after the posting of the notice of decision or intended decision. With respect to a protest of the terms, conditions, and specifications contained in a solicitation, including any provisions governing the methods of ranking proposals or replies, awarding contracts, reserving rights of further negotiation or modifying or amending any contract, the notice of protest shall be filed in writing within 72 hours after the posting of the solicitation. The formal written protest shall be filed within 10 days after the date of the notice of protest is filed. Failure to file a notice of protest or failure to file a formal written protest shall constitute a waiver of proceedings. The formal written protest shall state with particularity the facts and law upon which the protest is based. Saturdays, Sundays, and state holidays shall be excluded in the computation of the 72-hour time periods provided by this paragraph.
- C. The notice of protest will be reviewed by Procurement Management Services staff, which will offer the protesting proposer the opportunity to meet and discuss the merits of the protest. If the protest is not resolved, the proposer may seek an administrative hearing pursuant to 120.57 Florida Statutes, by filing a formal written protest within 10 days after filing the notice of protest. Petitions for hearings on protests pursuant to 120.57 Florida Statutes must be filed in accordance with School Board Rule 6Gx13-8C-1064.

V. AWARDS

- A. **RESERVATION FOR REJECTION OR AWARD.** The Board reserves the right to reject any and all proposals, to waive irregularities or technicalities, and to request re-bids.
- B. **NOTIFICATION OF INTENDED ACTION.** Notices will be posted on the District’s website 7-10 days prior to a regularly scheduled Board meeting.
- C. **OFFICIAL AWARD DATE.** Awards become official upon Board action.
- D. **CHARTER SCHOOLS:** Items awarded under this contract shall be made available to charter schools authorized by the School Board.

VI. DEFAULT

In the event of default, which may include, but is not limited to non-performance and/or poor performance, the awardee shall lose eligibility to transact new business with the Board for a period of 14 months from date of termination of award by the Board. Proposers that are determined ineligible may request a hearing pursuant to §120.569, Fla. Stat., and School Board Rule 6Gx13-8C-1.064.

VII. PUBLIC ENTITY CRIMES

§ 287.133(2)(a) Florida Statute. A person or affiliate who has been placed on the convicted vendor list following a conviction for a public entity crime may not submit a bid on a contract to provide any goods or services to a public entity, may not submit a bid on a contract with a public entity for the construction or repair of a public building or public work, may not submit bids on leases of real property to a public subcontractor, or consultant under a contract with any public entity, and may not transact business with any public entity in excess of the threshold amount provided in § 287.017, for CATEGORY TWO for a period of 36 months from the date of being placed on the convicted vendor list.

VIII. COMPLIANCE WITH FEDERAL REGULATIONS

All contracts involving Federal funds will contain certain provisions required by applicable sections of Title 34, §§ 80.36(l) and 85.510 Code of Federal Regulations and are included by reference herein. The vendor certifies by signing the proposal that the vendor and its principals are not presently debarred, suspended, proposed for debarment, declared ineligible or voluntarily excluded from participation in Federally funded transactions and may, in certain instances, be required to provide a separate written certification to this effect.

During the term of any contract with the Board, in the event of debarment, suspension, proposed debarment, declared ineligible or voluntarily excluded from participation in Federally funded transactions, the vendor shall immediately notify the Assistant Superintendent, Procurement Management Services, in writing.

Vendors will also be required to provide access to records, which are directly pertinent to the contract and retain all required records for three years after the grantee (The Board) or sub-grantee makes final payment.

For all contracts involving Federal funds, in excess of \$10,000, The Board reserves the right to terminate the contract for cause as well as for convenience by issuing a certified notice to the vendor.

IX. CONE OF SILENCE

BOARD RULE 6GX13-8C-1.212

DEFINITION:

- A. "Cone of Silence" means a prohibition on any communication regarding a particular Request for Proposals (RFP), bid, or other competitive solicitation between:
1. Any person who seeks an award there from; including a potential vendor or vendor's representative; and
 2. Any School Board member or the member's staff, the Superintendent, Deputy Superintendent and their respective support staff, or any

person appointed by the School Board to evaluate or recommend selection in such procurement process.

The Cone of Silence shall not apply to communication with the School Board Attorney or his or her staff, or with designated school district staff, which are not serving on the particular Procurement Committee, to obtain clarification or information concerning the subject solicitation. For purposes of this section, "vendor's representative" means an employee, partner, director, or officer of a potential vendor, or consultant, lobbyist, or actual or potential subcontractor or sub-consultant of a vendor, or any other individual acting through or on behalf of any person seeking an award.

- B. A Cone of Silence shall be applicable to each RFP, bid, or other competitive solicitation during the solicitation and review of bid proposals. At the time of issuance of the solicitation, the Superintendent or the Superintendent's designee shall provide public notice of the Cone of Silence. The Superintendent shall include in any advertisement and public solicitation for goods and services a statement disclosing the requirements of this section.
- C. The Cone of Silence shall terminate at the time the Superintendent of Schools submits a written recommendation to award or approve a contract, to reject all bids or responses, or otherwise takes action which ends the solicitation and review process.
- D. Nothing contained herein shall prohibit any potential vendor or vendor's representative:
 - 1. From making public representations at duly noticed pre-bid conferences or before duly noticed selection and negotiation committee meetings;
 - 2. From engaging in contract negotiations during any duly noticed public meeting;
 - 3. From making a public presentation to the School Board during any duly noticed public meeting; or
 - 4. From communicating in writing with any school district employee or official for purposes of seeking clarification or additional information, subject to the provisions of the applicable RFP, or bid documents.

The potential vendor or vendor's representative shall file a copy of any written communication with the School Board Clerk who shall make copies available to the public upon request.

- E. Nothing contained herein shall prohibit the Procurement Committee's representative from initiating contact with a potential vendor or vendor's representative and subsequent communication related thereto for the purposes of obtaining further clarifying information regarding a response to

an RFP, or competitive solicitation. Such contact shall be in writing and shall be provided to the members of the applicable Procurement Committee, including any response thereto.

- F. Any violation of this rule shall be investigated by the School Board's Inspector General and may result in any recommendation for award, or any RFP award, or bid award to said potential vendor or vendor's representative being deemed void or voidable. The potential vendor or vendor's representative determined to have violated this rule, shall be subject to debarment. In addition to any other penalty provided by law, violation of this rule by a school district employee shall subject the employee to disciplinary action up to and including dismissal.

Specific Authority: 1001.41(1)(2); 1001.42(22); 1001.43(10) F.S.

Law Implemented, Interpreted or Made Specific: 1001.43(10); 1001.51(14) F.S.

History: THE SCHOOL BOARD OF MIAMI-DADE COUNTY, FLORIDA

New: 6-18-03

Revised 11/03

REQUEST FOR QUALIFICATIONS NO. 113-FF10

**APPRAISAL AND APPRAISAL-RELATED
SERVICES**

I. NAME AND ADDRESS OF REQUESTOR

The School Board of Miami-Dade County, Florida
Department of Site Acquisition and Leasing
1450 N.E. Second Avenue, Suite 525
Miami, Florida 33132

II. PURPOSE OF REQUEST FOR QUALIFICATIONS

The School Board of Miami-Dade County, Florida (the Board) requires Procurement Management services to maintain a list of pre-qualified real estate appraisers (appraisers) to whom it sends formal solicitations for quotes to bid on real estate appraisal services related, but not necessarily limited to, new construction, remodeling, site expansion, land acquisition, including condemnation, or disposal, and for determination of impact fee credits.

The purpose of this Request For Qualifications (RFQ) is to establish a list of pre-qualified real estate appraisers. The list of pre-qualified appraisers will be made up of three categories; residential, non-residential, and non-residential – complex (expert witness). Prospective applicants may submit the information to be considered for qualification for each category for which the proposer has the experience and qualifications to provide the specified services.

The Board will not award a contract as a result of this RFQ; the sole result will be the creation of a list of pre-qualified real estate appraisers, eligible to receive requests for written quotations. Quotations will be solicited from the approved list of pre-qualified appraisers, based on the appraiser's expertise in the specified services required by the Board.

III. INSTRUCTIONS FOR SUBMISSION OF PROPOSALS

Four (4) copies of the proposal must be submitted by 2:00 p.m. (Local Time) on June 29, 2006, at:

The School Board of Miami-Dade County, Florida
Bid Clerk, Procurement Management Services
1450 N.E. 2nd Avenue, Room 352
Miami, Florida 33132

The responsibility for submitting this proposal to the District on or before the stated time and date will be solely and strictly the responsibility of the proposers. The District will in no way be responsible for delays caused by the United States mail or any other delivery service or caused by any other occurrence. An officer of the firm legally authorized to conduct business in its name must sign the proposal. The Request for Qualifications must be submitted in a sealed envelope or box marked: "REQUEST FOR QUALIFICATIONS – APPRAISAL AND APPRAISAL-RELATED SERVICES."

It is anticipated that the list of qualified appraisers may be presented to The School Board of Miami-Dade County, Florida, (the Board) for acceptance on or about August 2, 2006. If accepted, notification to the successful qualified appraisers will be on or after August 2, 2006. The School Board reserves the right to reject any and all requests for qualifications.

IV. GENERAL INFORMATION ABOUT THE SCHOOL DISTRICT

Miami-Dade County Public Schools (M-DCPS) acquires real property of various types, from single-family residential dwellings, to acreage, to improved non-residential properties. Acquisitions may range from the relatively straightforward purchase of a detached single-family residence with no extraordinary conditions, to those that include complex valuation issues, to those that may require the use of the M-DCPS' eminent domain powers.

Users of appraisal services require that the providers of such services have a variety of skills in order to produce credible, well-documented opinions of value. M-DCPS is a user of appraisal services and it is proper that guidelines for the identification and selection of appraisers to fulfill this requirement be established.

The State of Florida, via mandates from Federal agencies, requires the Department of Business and Professional Regulations to license those who provide appraisals. Therefore, M-DCPS would necessarily utilize appraisers licensed by the State of Florida. There are four categories of licensure with the State: State-Registered Assistant Real Estate Appraiser, State-Licensed Residential Real Estate Appraiser, State-Certified Residential Real Estate Appraiser and State-Certified General Real Estate Appraiser.

The education and experience requirements for each licensure category are summarized in **ATTACHMENT A**. M-DCPS will utilize only those appraisers that hold the State-Certified Residential Real Estate Appraiser or State-Certified General Real Estate Appraiser licenses. However, such licensure sets only the minimum criteria for qualifying an appraiser for the scope of services required by M-DCPS.

Within the categories of licensures, M-DCPS requires the skills of appraisers with a breadth of experience in developing the scope of an appraisal issue(s) and the

valuation methodologies to address that issue(s). Given the nature of acquisitions made by M-DCPS, three categories of appraisers will be selected.

V. MINIMUM QUALIFICATIONS

All appraisers licensed by the State of Florida, regardless of category must adhere to the Uniform Standards of Professional Appraisal Practice (USPAP) in the development and reporting of an appraisal report (**ATTACHMENT B**).

In order to be placed on the pre-qualified list, the appraiser shall meet the following minimum requirements pursuant to this RFQ:

- A. Licensed by the State of Florida as set forth under “Category 1”, “Category 2” or “Category 3”.
- B. Meet the eligibility requirements of §253.025(6)(b), Florida Statutes and Rule 18-1.007, Florida Administrative Code.
- C. Properly licensed with the Florida Department of Business and Professional Regulation to practice in the State of Florida at the time of submittal, and at all times during the term of qualifications, pursuant to this RFQ. If submitted by a corporation, at the time of submittal, at the time of award of contract, and at all times during the term of qualification, pursuant to this RFQ, the corporation shall be an active corporation authorized to do business in the State of Florida.
- D. Hold all pertinent occupational licenses as a licensed appraiser or the appraiser’s firm, as required by the property authorities.
- E. At the time of submittal, the appraiser shall not be a defendant in any lawsuit concerning the appraiser’s skills, qualifications, preparation of an appraisal report, completion of an appraisal contract, or fraud and shall have no final judgments recorded against the appraiser concerning the appraiser’s skills, qualification, preparation of an appraisal report, completion of an appraisal contract, or fraud.
- F. At the time of submittal, the appraiser shall have no pending criminal investigations or charges and shall not have been adjudicated guilty or pled no contest to any criminal charges.
- G. At the time of submittal, the appraiser shall not have had their appraisal license, certification or registration, whether in Florida or in any other state, revoked, suspended or otherwise involuntarily terminated.

- H. At the time of submittal, no School Board member or Board employee shall be an employee of the appraiser or be a partner, member, stockholder, or officer of the appraiser's firm or corporate entity.
- I. At the time of submittal, no member, stockholder, or officer of the appraiser's firm shall be in arrears or in default of any debt or contract involving the Board, or shall have failed to faithfully and ably perform any previous contract with the Board.
- J. At the time of submittal, the appraiser shall have met the requirements outlined under Category 1, Category 2, or Category 3.

The foregoing minimum qualifications are in addition to those specified under each Category. Should the Proposer wish to be qualified for more than one Category, the Proposer must meet the required qualifications under each, and submit the required information for each Category.

VI. CATEGORIES OF PREQUALIFICATION AND REQUIRED INFORMATION TO BE SUBMITTED BY PROPOSER

Category 1 - Residential – One to four-family residential property

Applicant must be a State-Certified Residential Real Estate Appraiser, or a State-Certified General Real Estate Appraiser and must submit a copy of such certification/license.

The proposer shall provide the following information as part of the submittal. If a firm, then where individual information is required, the submittal shall include such information for every appraiser that may perform services pursuant to this Request for Qualifications. Failure to submit the requested documentation with the Qualification Request may deem a proposal non-responsive and ineligible for award.

1. Acknowledgement form, (**ATTACHMENT C**), signed and notarized, attesting to the Proposers compliance with items (A) to (J) of Part IV of this Request For Qualifications.
2. Complete vendor information sheet (**ATTACHMENT D**).
3. List, with dates, educational background with degrees conferred. Additional appraisal courses completed, appraisal courses taught, and all certifications, licenses and registrations conferred.
4. Submit a list of at least fifty (50) appraisal reports of residential property performed within the past two (2) years for properties located

in Miami-Dade County. The list shall include the property type (detached, attached, condominium, duplex, vacant residential-zoned lot, etc.), property location. Purpose of appraisal, date of appraisals, interest appraised, size of property, property zoning. And the entity for which the appraisal was conducted (if the appraisal was of an owner, "Owner" is adequate, in lieu of identifying the specific name, if confidentiality is a concern).

5. Minimum of three (3) references listed on **ATTACHMENT E**, for whom similar work has been completed.
6. If applicable, in addition to the foregoing, it is recommended that an appraiser-applicant with expert witness experience, and with an interest in providing such services to the M-DCPS, submit a list of appraisals completed on property that was under threat of condemnation and/or subject of condemnation proceedings. If applicable, submit a list of at least five (5) appraisals prepared and signed by the appraiser within the last five (5) years for property located in Miami-Dade County. The list shall included property location, purpose of appraisal, date of appraisal, interest appraised, size of property, property zoning, and the entity for which the appraisal was conducted (if the appraisal was of an owner, "Owner" is adequate, in lieu of identifying the specific name, if confidentiality is a concern).
7. If applicable, submit a summary of any experience the appraiser has with appraising property involving partial site development, parcels with historically significant improvements, and parcels with environmental or historical considerations.
8. Copy of the proposers occupational license and other license as indicated in **Section VI, Paragraph A**.
9. The signature of the authorized person empowered to submit this proposal included on the **Anti-Collusion Statement** of this RFQ.

Category 2 – Non-residential

Applicant must be a State-Certified General Real Estate Appraiser and must submit a copy of such certification/license.

The proposer shall provide the following information as part of the submittal. If a firm, then where individual information is required, the submittal shall include such information for every appraiser that may perform services pursuant to this Request For Qualifications. Failure to submit the requested documentation with the Proposal may deem a proposal non-responsive and ineligible for award.

1. Acknowledgement form, (**ATTACHMENT C**), signed and notarized, attesting to the proposers compliance with items (A) to (J) of Part VI of this Request for Qualifications.
2. Complete vendor information sheet (**ATTACHMENT D**).
3. List, with dates, educational background with degrees conferred, additional appraisal courses completed, appraisal courses taught, and all certifications licenses and registrations conferred.
4. Submit a list of appraisals within the past three (3) years for properties located in Miami-Dade County where in a land valuation was included. The list shall include the property location, purpose of appraisal, date of appraisal, interest appraised, size of property, property zoning, and the entity for which the appraisal was conducted (if the appraisal was of an owner, "Owner" is adequate, in lieu of identifying the specific name, if confidentiality is a concern).
5. Minimum of three (3) references listed on **ATTACHMENT E**, for whom similar work has been completed.
6. If applicable, submit a summary of any experience the appraiser may have with appraising property involving partial site development, parcels with historically significant improvements. And parcels with environmental or historical consideration (i.e. environmentally sensitive land).
7. Copy of the proposers occupational license and other license as indicated in **Section VI, Paragraph A**.
8. The signature of the authorized person empowered to submit this proposal included on the **Anti-Collusion Statement** of this RFQ.

Category 3 – Non-residential – Complex (Expert Witness)

Applicant must be a State-Certified General Real Estate Appraiser and must submit a copy of such certification/license.

The proposer shall provide the following information as part of the submittal. If a firm, then where individual information is required, the submittal shall include such information for every appraiser that may perform services pursuant to this RFQ.

1. Acknowledgement form, (**ATTACHMENT C**), signed and notarized, attesting to the Proposers compliance with items (A) to (J) of Part VI of this Request For Qualifications.

2. Complete vendor information sheet (**ATTACHMENT D**).
3. List, with dates, educational background with degrees conferred, additional appraisal courses complete, appraisal courses taught, and all certifications, licenses and registrations conferred.
4. Submit a list of at least five (5) appraisal reports prepared and signed by the appraiser within the last three (3) years, which were prepared for governmental agencies and individuals for property that was under threat of condemnation.
5. Submit a list of at least three (3) appraisals prepared and signed by the appraiser within the last three (3) years, for any property located in Miami-Dade County subject to condemnation proceedings. These reports may also be referred to in the response to **Paragraph 4 of Category 3**.
6. Submit a list of at least five (5) cases involving condemnation proceedings wherein the appraiser testified within the last five (5) years. Testimony includes depositions, order of taking hearing, and valuation trial. The list shall include the case name, the court in which the matter was pending (i.e. Dade County Circuit Court), the type of proceeding (deposition, order of taking hearing, valuation trial), the date of the testimony (month and year), and the party on whose behalf the appraiser was testifying (FDOT, owner, etc.). In addition thereto, the list shall include the property location, purpose of appraisal, date of appraisal, interest appraised, size of property, property zoning, and the entity for whom the appraisal was conducted (if the appraisal was for an owner, "Owner" is adequate, in lieu of identifying the specific name of the owner, if confidentiality is a concern).
7. Minimum of three (3) references listed on **ATTACHMENT E**, for whom similar work has been completed.
8. Copy of the proposers occupational license and other license as indicated in **Section VI, Paragraph A**.
9. The signature of the authorized person empowered to submit this proposal included on the **Anti-Collusion Statement** of this RFQ.

VII. TERMS OF QUALIFICATIONS

The term of this list of qualified appraisers shall be for an initial two (2) year period, and may, by mutual agreement between the School Board and the Awardee(s), be extended for one additional two (2) year period, or a new list will be created based

upon the above specifications and any amendments of the above requirements. The School Board, through Procurement Management Services, may, if considering to extend, request a letter of intent to extend from the Awardee(s) prior to the end of the current contract period. The Awardee(s) will be notified when the recommendation has been acted upon.

VII. EQUAL EMPLOYMENT OPPORTUNITY AND M/WBE PARTICIPATION

Equal Employment Opportunity

- A. It is the policy of the School Board that no person will be denied access, employment, training, or promotion on the basis of gender, race, color, religion, ethnic or national origin, political beliefs, marital status, age, sexual orientation, social and family background, linguistic preference or disability, and that merit principles will be followed.
- B. Each firm is requested to indicate its equal employment policy and provide a detailed breakdown by ethnicity, gender and occupational categories of its work force, (**ATTACHMENT F**).

M/WBE Participation

The School Board has an active Minority/Women Business Enterprise (M/WBE) Program, to increase contracting opportunities for M/WBE's. In keeping with this policy, if a minority firm, which is Woman or African American-owned and operated, is to perform a scope of work, provide documentation to substantiate the experience of the M/WBE and its staff in providing this type of service. The Division of Business Development and Assistance must certify all M/WBE's, prior to contract award. The M/WBE Application may be accessed through the following link:

<http://procurement.dadeschools.net/pdf/3920.pdf>

IX. INSURANCE REQUIREMENTS

The successful proposer, if selected for this Request for Qualifications, shall agree to provide proof of Professional Liability Insurance and to the following language:

The proposer shall hold harmless, indemnify and defend indemnities (as hereinafter defined) against any claim, action, loss, damage, injury, liability, but not by way of limitation, attorney's fees and court costs arising out of bodily injury to persons including death, or damage to tangible property arising out of or incidental to the performance of this contract (including goods and services provided thereto) by or on behalf of the proposer, excluding only the sole negligence of culpability of the

indemnatee, The following shall be deemed to be indemnitees; The School Board of Miami-Dade County, Florida, and its members, officers and employees.

At the time an award is made, the successful proposer shall be responsible for providing the School Board with certificates of insurance which indicate that insurance coverage has been obtained and meets the requirements as outlined below:

- A. Workers' Compensation Insurance for all employees of the proposer as required pursuant to the provisions of Chapter 440, Florida Statutes.
- B. Commercial General Insurance on a comprehensive basis in an amount not less than \$300,000 combined single limit per occurrence. The School Board of Miami-Dade County, Florida, its employees and agents must be listed as an additional insured on the policy.
- C. Automobile Liability Insurance covering all owned, non-owned and hired vehicles use in connection with the work as outlined in this Request for Qualifications, in an amount not less than \$300,000 combined single limit per occurrence for bodily injury and property damage liability.
- D. Proof of Professional Liability (e.g., medical malpractice) insurance in the name of the proposer, with limits of liability not less than \$1,000,000 per wrongful act. All certificate of insurance submitted must be issued by companies authorized to conduct business under the laws of the State of Florida, with an A.M. Best rating (most currently published) must be no less than 'B+' as to management, and no less than 'Class V' as to financial strength. Certificates shall indicate no modification in insurance be made within thirty (30) days advance written notice to the additional named insured or certificate holder.

X. THE JESSICA LUNSFORD ACT BACKGROUNDSCREENING REQUIREMENTS

In accordance with the requirements of §§ 1012.32, 1012.465, and 435.04, Florida Statutes (2004) as well as with the requirements of HB 1877, The Jessica Lunsford Act (2005), effective September 1, 2005, Contractor agrees to certify under oath and penalty of perjury, see **ATTACHMENT G** (Sworn Statement Pursuant to §§ 1012.32, 1012.465, and 435.04, Florida Statutes (2004) and HB 1877, The Jessica Lunsford Act (2005) which is incorporated fully herein by reference, that Contractor and all of its employees who provide or may provide services under this Agreement have completed all background screening requirements as outlined in the above-referenced statutes.

Additionally, Contractor agrees that each of its employees, representatives, agents, subcontractors or suppliers who are permitted access on school grounds when students are present, who have direct contact with students or who have access to

or control of school funds must meet level 2 screening requirements as described in §§1012.32 and 435.04, Florida Statutes, and further upon obtaining level 2 clearance, must obtain a required Board issued photo identification badge which shall be worn by the individual at all times while on Board property when students are present.

Contractor agrees to bear any and all costs associated with acquiring the required background screening – including any costs associated with fingerprinting and obtaining the required photo identification badge. Contractor agrees to require all its affected employees to sign a statement, as a condition of employment with Contractor in relation to performance under this Agreement, agreeing that the employee will abide by the heretofore described background screening requirements, and also agreeing that the employee will notify the Contractor/Employer of any arrest(s) or conviction(s) of any offense enumerated in §. 435.04, Florida Statutes within 48 hours of its occurrence.

Contractor agrees to provide the Board with a list of all of its employees who have completed background screening as required by the above-referenced statutes and who meet the statutory requirements contained therein. Contractor agrees that it has an ongoing duty to maintain and update these lists as new employees are hired and in the event that any previously screened employee fails to meet the statutory standards. Contractor further agrees to notify the Board immediately upon becoming aware that one of its employees who was previously certified as completing the background check and meeting the statutory standards is subsequently arrested or convicted of any disqualifying offense. Failure by Contractor to notify the Board of such arrest or conviction within 48 hours of being put on notice and within 5 business days of the occurrence of a qualifying arrest or conviction shall constitute grounds for immediate termination of this Agreement by the Board.

The parties further agree that failure by Contractor to perform any of the duties described in this section shall constitute a material breach of the Agreement entitling the Board to terminate this Agreement immediately with no further responsibility to make payment or perform any other duties under this Agreement.

COMPLIANCE WITH SCHOOL CODE

Contractor agrees to comply with all sections of the Florida K-20 Education Code, Title XLVIII, Florida Statutes, as it presently exists, and further as it may be amended from time to time. Further Contractor agrees that failure to comply with the Florida K-20 Education Code shall constitute a material breach of this Agreement and may result in the termination of this Agreement by the Board.

XI. CONFLICT OF INTEREST

Former Miami-Dade County Public Schools employees, classified as Managerial Exempt Personnel, Pay Grade 22 and above, Dade County School Administrators Association, Pay Grade 47 and above, and other equivalent positions, are prohibited from personally representing another person or entity or acting as an agent or attorney for compensation in connection with any matter in which The School Board of Miami-Dade County, Florida, is interested, for two years after the School Board employees' service terminates. This provision is pursuant to School Board Rule 6Gx13 – 4A-1.212 and Florida Statute § 112.313(9).

The School Board of Miami-Dade County, Florida shall be prohibited from entering into any business relationship or continue an existing business relationship with any person or entity determined to have engaged in violation of the restriction contained in this provision.

XII. PUBLIC RECORDS LAW

It is the practice of The School Board of Miami-Dade County, Florida, to evaluate all Requests For Proposals in a public forum open to the Sunshine, pursuant to Florida Statute §286.011 and to make available for public inspection and copying any information received in response to an RFQ, in accordance with Florida Statute §119, as such any information sent to M-DCPS is being sent into the public domain. No action on the part of the proposer would create an obligation of confidentiality on the part of the School Board, including but not limited to, making a reference in the proposal to the trade secret statutes, Florida Statutes §§ 812.081, 815.045. It is recommended that potential suppliers exclude from their response any information that, in their judgment, may be considered a trade secret.

XIII. IMPLEMENTATION SCHEDULE

The planned schedule for implementation of proposals is as follows:

Procurement Contract Review Committee	June 8, 2006
Mailing of Request for Qualifications	June 9, 2006
Opening of Proposals	June 29, 2006
Recommendation for Award	August 2, 2006

XIV. ADDITIONAL INFORMATION

The following individual should be contacted for any additional information with respect to this Request for Proposal:

Ms. Barbara D. Jones, Director
Procurement Management Services
Miami-Dade County Public Schools
1450 NE 2nd Avenue, Room 356
Miami, FL 33132
(305) 995-2348
E-mail: bjones@dadeschools.net

ATTACHMENT A

State of Florida – Licensing of Appraisers

F.S. Chapter 475.610 sets forth that "The Legislature deems it necessary in the interest of the public welfare to regulate real estate appraisers in this state."

Each appraiser registered, licensed, certified under 475.628 (F.S.) shall comply with the USPAP. Further, statements issued through the Appraisal Foundation shall also be binding on any appraiser registered, licensed or certified in the State.

A license or certification may not be issued to a corporation, partnership, firm or group (F.S. 475.620). The licensure categories may only be used to refer to an individual who is registered, licensed or certified under the F.S. Chapter 475, Part II.

The cited categories of licensure are those permitted and defined by the Rules of the Florida Real Estate Appraisal Board (Chapter 61J1). According to F.S. 475.613 (2), the FREAB shall have, through its rules, full power to regulate the issuance of licenses, certifications, registrations, and permits; to discipline appraisers in any manner permitted under this section; to establish qualifications for licenses, certifications, registrations, and permits consistent with this section; to regulate approved courses; and to establish standards for real estate appraisals.

State of Florida – Licensing of Appraisers

The **minimum** standards for each license category are summarized below, in order of complexity of licensure.

State Registered Assistant Real Estate Appraisers:

- Must satisfactorily complete **75 hours of approved academic courses** in subjects related to real estate appraisal, which shall include coverage of USPAP.
- **No appraisal experience required**; this is an entry-level position.
- A registered assistant appraiser "shall perform appraisal services under the supervision of one licensed or certified appraiser who will be designated as the primary supervisor". The registered assistant's supervisor must be identified and disclosed. "If the document, report, contract...is signed by the registered appraiser, then the supervising appraiser shall also sign and disclose the appropriate designation and number." (61J1-7.010)

ATTACHMENT A

State of Florida – Licensing of Appraisers - Continued

State-Certified Licensed Real Estate Appraisers:

- Must satisfactorily complete **90 classroom hours of approved academic courses** in subjects related to real estate appraisal, which shall include coverage of USPAP.
- Obtain **2,000 hours of real property appraisal experience** over a 24-month period. Experience shall consist of a minimum of 150 supportable and documented appraisal reports presented in a format generally acceptable to the appraisal industry.

NOTE: This category is set for dissolution by the Florida Real Estate Appraisal Board.

State-Certified Residential Appraisers:

- Must satisfactorily complete **120 classroom hours of approved academic courses** in subjects related to real estate appraisal, which shall include coverage of USPAP.
- Obtain **2,500 hours of real property appraisal experience** over a 24-month period. Experience shall consist of a minimum of 150 supportable and documented appraisal reports presented in a format generally acceptable to the appraisal industry.

State-Certified General Real Estate Appraisers:

- Must satisfactorily complete **180 classroom hours of approved academic courses** in subjects related to real estate appraisal, which shall include coverage of USPAP.
- Obtain **3,000 hours of real property appraisal experience** over a 30-month period (but not less than 24 months). At least 50% of the hours (1,500 hours) claimed must be in non-residential appraisal work.
- Experience shall consist of a minimum of 23 Summary or Self-Contained Appraisal Reports in a narrative format which comply with the Uniform Standards of Professional Appraisal Practice (USPAP); or 12 non-residential Summary or Self-Contained reports in a narrative format that comply with USPAP and 135 non-narrative supportable and documented appraisal reports presented in a format generally acceptable to the appraisal industry.

ATTACHMENT A

State of Florida – Licensing of Appraisers - Continued

License Renewal – All Categories of Licensure: Each registered assistant, licensed or certified appraiser must satisfactorily complete 30 hours of continuing education, approved by the FREAB, in order to renew their appraisal license with the State of Florida every two years. Of the 30 hours, a minimum of 7 hours with a maximum of 15 hours shall include an update of the USPAP and Florida Real Estate Appraisal License Law and introduction of other state and federal laws affecting real estate appraisals.

ATTACHMENT B

Uniform Standards of Professional Appraisal Practice – USPAP

Background

These standards are based on the original written in 1986-1987 by the Ad Hoc Committee on Uniform Standards; it was donated to and copyrighted by The Appraisal Foundation in 1987.

The Appraisal Foundation is a non-profit educational organization founded in 1987 to foster professionalism in appraisal through the establishment and promotion of professional appraisal standards and appraiser qualifications.

The Appraisal Foundation is authorized by Congress as the source of appraisal standards and appraisal qualifications. It is the parent organization for two independent boards: the Appraiser Qualifications Board (AQB) and the Appraisal Standards Board (ASB).

The AQB establishes the qualification criteria for state licensing, certification and recertification of appraisers. FIARREA mandates that all state certified appraisers must meet the minimum education, experience and examination requirements promulgated by the AQB.

The ASB sets forth the rules for developing an appraisal and reporting its results. It promotes the use, understanding and enforcement of the USPAP, which contains the recognized standards of practice for real estate, personal property and business appraisal. FIARREA requires that real estate appraisals used in conjunction with Federally related transactions be performed in accordance with USPAP.

The Financial Institutions Reform, Recovery and Enforcement Act (FIARREA) of 1989 cites USPAP as the standards to be enforced by state real estate appraiser licensing agencies. *Through FIARREA, the Federal government has mandated that the states enforce USPAP compliance by real property appraisers.* USPAP is released on an annual basis.

Title XI, of FIARREA, Sec. 1102, established the Appraisal Subcommittee (ASC) of the Federal Financial Institutions Examination Council (August 9, 1989). Title XI's purpose is to "provide that Federal financial and public policy interests in real estate related transactions will be protected by requiring that real estate appraisals utilized in connection with federally related transactions are performed in writing, in accordance with uniform standards, by individuals whose competency has been demonstrated and whose professional conduct will be subject to effective supervision." (Title XI, Sec. 1101 [12 U.S.C. 3331])

ATTACHMENT B

Uniform Standards of Professional Appraisal Practice – USPAP

Background – Continued

The ASC's general responsibilities include, among others, the monitoring of the requirements established by the States and their appraiser regulatory agencies (State agencies) for the certification and licensing of appraisers.

The ASC reviews each State's compliance with the requirements of Title XI and is authorized by Title XI to take action against non-complying states; and to monitor and review the practices, procedures, activities and organizational structure of the Appraisal Foundation.

Professional appraisal associations, client groups and dozens of federal, state and local agencies, also require USPAP compliance. The current edition of the USPAP is the 2001 Edition and is effective through December 31, 2001. The USPAP is revised frequently to embrace changes in the appraisal profession and technology. Indeed, revisions to the USPAP, effective January 1, 2002, have been adopted and will be available in the before their effective date. Licensed and Certified appraisers are required to comply with the most edition of USPAP.

ATTACHMENT C

The undersigned hereby acknowledges and attests to the following:

I am licensed by the State of Florida as a State-Certified General Real Estate Appraiser, per Chapter 475, Part II and have completed the necessary continuing education courses, as required by the State of Florida.

I meet the eligibility requirements of Section 253.025(6)(b), Florida Statutes and Rule 18-1.007, Florida Administrative Code.

I am properly registered with the Florida Department of Business and Professional Regulation to practice in the State of Florida at the time of submittal, and I will advise the Board if that status changes. If the submittal is submitted by a corporation, then at the time of submittal, at the time of award of a contract, and at all times during the term of any contract award pursuant to this RFQ, the corporation shall be an active corporation authorized to do business in the State of Florida.

I hold an occupational license as an appraiser issued by the proper authorities.

Neither I nor my firm, have any pending lawsuits concerning my/my firm's skills or qualifications as an appraiser, or my/my firm's completion of (or failure to complete) an appraisal contract, and neither me nor my firm have had any judgments entered against me/my firm regarding my/my firm's skills or qualifications as an appraiser, or my/my firm's completion of (or failure to complete) an appraisal contract, and I have no pending criminal charges or investigations, and I have not been adjudicated as guilty of, or pled no contest to charges of, any crimes; and I have not had my appraisal license (in any state) revoked, suspended, or otherwise terminated.

I do not presently have any conflicts of interest in providing services to the BOARD, and I agree if I am successful in being placed on the Board's list of pre-qualified appraisers, and if I am successful in having negotiations instituted for a contract to perform services on a specific property, will advise the Board if I have performed or am performing professional services for the owner(s) of said property.

Neither I, nor any member, stockholder, or officer of my firm (if I am a member of a firm) is in arrears or in default of any debt or contract involving the BOARD, nor have I or my firm failed to faithfully and ably perform any previous contract with the BOARD.

I have sufficient, trained and licensed personnel to provide the required service(s).

Vendor Information Sheet
RFP 113-FF10
APPRAISALS AND APPRAISAL-RELATED SERVICES

ATTACHMENT D



1A. _____
 Federal Employer Identification Number

Or _____
 Owner's Social Security Number

1B. _____
 Name of Firm, Individual(s), Partners or Corporation

_____ Street Address

_____ City State Zip Code

2. Telephone/Fax/Contact Person

_____ Telephone number

_____ Fax number

_____ Contact Person

_____ E-mail address

3. Ownership Disclosure

If the contract or business transaction is with a corporation, partnership, sole proprietorship, or joint venture, the full legal name and business address shall be provided for the chief **officer**, director, or owner who holds, directly or indirectly the majority of the stock or ownership. If the contract or business transaction is with a trust, the full legal name and address shall be provided for each trustee and each beneficiary. **Post Office addresses are not acceptable.**

Name	Title	Address	Gender	Race-ethnicity	Stock Ownership

NOTE: The information provided by the vendor on this form should be consistent with that provided on the "Vendor's Application". All vendors must have a current vendor's application on file with M-DCPS, and have provided information and/or be familiar with M-DCPS' policy regarding the following: (a) Employment Disclosure, (b) Drug Free Workplace, (c) Family Leave Policy, (d) Code of Business Ethics, (e) Conflict of Interest, (f) Perception, (g) Gratuities, and (h) Business Meals. **Failure to provide M-DCPS a current vendor application may cause the vendor not to be awarded any new business with M-DCPS.** Vendor applications can be downloaded at: <http://procurement.dadeschools.net>

"Reference Sheet"

RFP 113-FF10

APPRAISALS AND APPRAISAL-RELATED SERVICES



Proposer: _____

Firm Representative: _____

_____ Street Address

_____ City State Zip Code

License Number Date

Occupational License Effective Date and Number:		
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Email: _____

Phone: _____

Fax: _____

URL: _____

Years in Business: _____

Please list below 3 of your most recent references and indicate the type of service provided for each client. References will be verified.

Company	Contact	Address	Phone	Fax	Scope of services provided

Miami-Dade County Public Schools
SWORN STATEMENT - NEW CONTRACTS

ATTACHMENT G

**SWORN STATEMENT PURSUANT TO SECTION 1012.465,
FLORIDA STATUTES AS AMENDED BY
HB 1877, THE JESSICA LUNSFORD ACT**

THIS FORM MUST BE SIGNED AND SWORN TO IN THE PRESENCE OF A NOTARY PUBLIC OR OTHER OFFICIAL AUTHORIZED TO ADMINISTER OATHS.

1. This sworn statement is submitted to The School Board of Miami-Dade County, Fl

(Hereinafter "Board" or "School Board") by _____

(Print individual's name and title)

for _____

(Print Name of entity submitting sworn statement)

whose business address is _____

and its Federal Employer Identification Number (FEIN) is _____.
If the entity has no FEIN, include the Social Security Number (SSN) of the individual signing this sworn statement and so indicate.

2. I, _____, am duly authorized to make this

(Print individual's name and title)

sworn statement on behalf of _____.

(Print Name of entity submitting sworn statement)

3. I understand that during the 2005 Legislative Session, House Bill 1877, The Jessica Lunsford Act (hereinafter "The Act" or "Act") was passed and approved by Governor Bush on May 2, 2005, with an effective date of September 1, 2005.

Initials

4. I understand that the Act amends the background screening requirements of section 1012.465, Florida Statutes (2004) for all non-instructional school district employees or **“contractual personnel”** by requiring all non-instructional school district employees or contractual personnel who are permitted access on school grounds when students are present to undergo and pass “level 2 background screening,” and further I understand the Act defines **“contractual personnel”** to include any vendor, individual, or entity under contract with the Board.
5. I understand that pursuant to section 1012.465, Florida Statutes as amended by the Act, non-instructional school district employees or contractual personnel who are permitted access on school grounds when students are present, who have direct contact with students or who have access to or control of school funds must meet level 2 screening requirements as described in sections 1012.32 and 435.04, Florida Statutes.
6. I understand that as a _____ (eg. a private bus

Type of entity

service contractor) all contractual personnel, as defined in section 1012.465, Florida Statutes, must meet level 2 screening requirements as outlined in sections 1012.32 and 435.04, Florida Statutes in order to do business with The School Board of Miami-Dade County, Florida.
7. I understand that “level 2 screening requirements,” as defined in sections 1012.32 and 435.04, Florida Statutes means that fingerprints of all contractual personnel must be obtained and submitted to the Florida Department of Law Enforcement for state processing and to the Federal Bureau of Investigation for federal processing.
8. I understand that the School Board will implement local procedures to comply with level 2 screening requirements, as defined in sections 1012.32 and 435.04. I understand that my company must comply with these local procedures as they are developed.
9. I understand that any costs and fees associated with the required background screening will be borne by my company.
10. I understand that any personnel of the contractor found through fingerprint processing and subsequent level 2 background screening to have been found guilty of, regardless of adjudication, or entered a plea of nolo contendere or guilty to any offense outlined in Section 435.04, Florida Statutes (or any similar statute of another jurisdiction), shall not be permitted to come onto school grounds or any leased premises where school-sponsored activities are taking place when students are present, shall not be permitted direct contact with students, and shall not be permitted to have access to school district funds.

11. I understand that the failure of any of the company's or my affected personnel to meet level 2 screening standards as required by section 1012.465, Florida Statutes, may disqualify my company from doing business with The School Board of Miami-Dade County, Florida.
12. I hereby certify that the foregoing statement is true and correct in relation to the company for which I am submitting this sworn statement. I further certify that this statement is being given knowingly and voluntarily by me on behalf of my company.

The company submitting this sworn statement agrees to be bound by the provisions of SECTIONS 1012.32, 1012.465, AND 435.04 OF THE FLORIDA STATUTES AS AMENDED BY HB 1877, THE JESSICA LUNSFORD ACT 2005.

I CERTIFY THAT THE SUBMISSION OF THIS FORM TO THE SCHOOL BOARD OF MIAMI-DADE COUNTY, FLORIDA ON BEHALF OF THE COMPANY IDENTIFIED IN PARAGRAPH ONE (1) ABOVE BINDS THE COMPANY TO FULLY COMPLY WITH THE BACKGROUND SCREENING REQUIREMENTS OF SECTIONS 1012.32, 1012.465, AND 435.04, FLORIDA STATUTES.

(Signature)

Sworn to and subscribed before me this _____ day or _____, 20____.

Personally known _____

OR Produced Identification _____

Notary Public -State of _____

(Type of Identification)

My commission expires _____

(Printed typed or stamped commissioned name of notary public)