

**SOUND TRANSIT
STAFF REPORT**

MOTION NO. M2005-85

Contract for Appraisal Services

| Meeting: | Date: | Type of Action: | Staff Contact: | Phone: |
|-------------------|--------------|----------------------------|---|--------------------------------------|
| Finance Committee | 8/18/05 | Discussion/Possible Action | Phil O'Dell, Director, Project Delivery Support Services Joanne Amiri, Project Coordinator, Project Delivery Support Services | (206) 398-5013 (206) 398-5315 |

| Contract/Agreement Type: | ✓ | Requested Action: | ✓ |
|--------------------------------------|---|-----------------------------------|---|
| Competitive Procurement | ✓ | Execute New Contract/Agreement | ✓ |
| Sole Source | | Amend Existing Contract/Agreement | |
| Agreement with Other Jurisdiction(s) | | Budget Amendment | |

PROPOSED ACTION

Authorizes the Chief Executive Officer to execute a contract with Bruce C. Allen and Associates, Inc. to provide appraisal services for a total authorized contract amount not to exceed \$1,300,000, for a three-year term with two, one-year options to extend the contract.

KEY FEATURES of PROPOSED ACTION

- Provides real estate appraisal services of real property projected for the acquisition necessary for construction and operation of Central Link Light Rail, as well as other miscellaneous appraisal projects for Regional Express and Sounder.
- The purpose of this action is to obtain just and equitable evaluation of the fair market value of each property interest to be acquired in a timely manner.
- This contract calls for Bruce C. Allen and Associates, Inc. to represent Sound Transit as the appraisal expert in mediations, court sessions, dispositions and attorney conferences or any other meeting as required in conjunction with the appraisal.
- The scope of work includes reviewing opposing party's appraisal and preparing oral or written evaluation and providing True Cost Analyses, which may include technical support or community outreach participation.

BUDGET IMPACT SUMMARY

Project Name: Appraisal Services
Current Project Phase: Ongoing
Projected Completion Date: Ongoing

| Action Outside of Adopted Budget: | ✓ | Comments on Checked Items |
|--|----------|----------------------------------|
| This Project | | |
| This Phase | | |
| This Task | | |
| Budget Amendment Required | | |

| Key Financial Indicators: | ✓ | Comments on Checked Items |
|--|----------|----------------------------------|
| Contingency Funds Required | | |
| Funding required from other parties (other than what is assumed in financial plan) | | |

Not checked = action is assumed in current Board-adopted budget. No budget action or adjustment to financial plan required.

BUDGET and FINANCIAL PLAN DISCUSSION

Budget for the proposed action is included in the Adopted 2005 Budget within the various agency capital projects in the Right of Way phase in proportion to the specific project's right-of-way needs. The figures noted in this action reflect the current forecast of within each department.

BUDGET TABLE

Summary for Board Action (Year of Expenditure \$000)

Action Item: Real Estate Appraisal Services

| | (A) Current Approved Contract Value | (B) Spent to Date | (C) Proposed Action | (D) Proposed Total Contract Value |
|--------------------------------|--|----------------------|------------------------|---|
| Contract Budget: | | | | |
| Real Estate Appraisal Services | 0 | - | 1,300,000 | 1,300,000 |
| Contingency | 0 | - | | - |
| Total | | | 1,300,000 | 1,300,000 |
| Percent Contingency | 0% | - | 0% | 0% |

| Accounts to be charged: | 2002 Staff Budget | Future Staff Budgets | Direct Charges to Projects | Total |
|--|----------------------|-------------------------|-------------------------------|-----------|
| Real Estate Acquisition Services In Capital Projects | | | 1,300,000 | 1,300,000 |
| | | | | - |
| | | | | - |
| TOTAL CONTRACT CHARGES: | - | - | 1,300,000 | 1,300,000 |

| Direct Charge Budget | Adopted Lifetime Capital Budget for ROW | Life Time Spent to Date | This Action | Suplus (Shortfall) |
|-------------------------------------|--|----------------------------|-------------|--------------------|
| Link Light Rail | 261,001,689 | 207,348,926 | 1,000,000 | 52,652,763 |
| Regional Express | 61,997,873 | 42,298,127 | 150,000 | 19,549,746 |
| Sounder Commuter Rail | 359,364,177 | 222,616,975 | 150,000 | 136,597,202 |
| TOTAL DIRECT CHARGE BUDGETS: | 682,363,739 | 472,264,028 | 1,300,000 | 208,799,711 |

Budget Shortfall

| Level | \$ | Revenues | Funding Source |
|-------|----|----------|----------------|
| NA | - | - | NA |

Notes

M/W/DBE – SMALL BUSINESS PARTICIPATION

Prime Consultant/Contractor

Bruce C. Allen and Associates, Inc. is the prime consultant for this contract. Bruce C. Allen & Associates is committed to a 43% small business goal and a 22% M/W/DBE goal.

Utilization Breakdown Table

| Subconsultant | Business Type | % of Work | Dollar Value |
|--------------------------|----------------|------------|----------------|
| McKee & Schalka | Small Business | 35% | 484,417 |
| CIC Valuation | MBE | 22 % | 304,492 |
| NG Jacobson & Associates | Small Business | 6% | 83,043 |
| Martyn Daniel | Small Business | 2% | 27,682 |
| Total | | 65% | 899,633 |

EEO Commitment

Bruce C. Allen & Associates has a total of 17 employees; the workforce demographics are 12% minority and 41% women.

Apprentice Utilization Commitment

Not applicable to this action.

PROJECT DESCRIPTION and BACKGROUND for PROPOSED ACTION

In order to build a high-capacity transit system consisting of commuter rail service, light rail service, regional bus service, HOV improvements and park-and-ride facilities throughout the central Puget Sound region, it is necessary for Sound Transit to acquire real property.

In February 2005, a competitive procurement process resulted in three vendors submitting proposals. Bruce C. Allen and Associates, Inc. was selected as it met the contract’s criteria and was the lowest bidder. Bruce C. Allen and Associates, Inc. has provided appraisal services for Sound Transit as a subcontractor with Arthur Anderson and Pharos Corporation.

Prior Board/Committee Actions on this Project and Relevant Board Policies

| Motion or Resolution Number | Summary of Action | Date of Action |
|------------------------------------|--|-----------------------|
| M2002-103 | Executed a sole source contract with Pharos Corporation to provide interim acquisition/relocation services for a period of six months for Regional Express and Commuter Rail capital projects in an amount not to exceed \$250,000 | 9/12/02 |
| M2000-29 | Executed a contract for Acquisition/Relocation/Project Management Services for Sounder Commuter Rail and Regional Express with Arthur Andersen LLP, in an amount not to exceed \$4,994,142.00. | 3/16/00 |
| M1998-36 | Executed contracts for Appraisal Services with Bruce C. Allen and Associates, Inc. and Mundy & Associates. The contract(s) will be for an initial term of one (1) year with the option to renew for three (3) additional one-year terms. Total award of these contracts will not exceed \$1,800,000. | 5/7/98 |

CONSEQUENCES of DELAY

A two week delay in approval of this action would not have a significant impact on the agency work schedule.

PUBLIC INVOLVEMENT

Not applicable to this action.

LEGAL REVIEW

JW 8/10/05

SOUND TRANSIT

MOTION NO. M2005-85

A motion of the Finance Committee of the Central Puget Sound Regional Transit Authority authorizing the Chief Executive Officer to execute a three-year contract with Bruce Allen and Associates, Inc. to provide appraisal services for a total authorized contract amount not to exceed \$1,300,000, for a three-year term, with two, one-year options to extend the contract.

Background:

In order to build a high-capacity transit system consisting of commuter rail service, light rail service, regional bus service, HOV improvements and park-and-ride facilities throughout the central Puget Sound region, it is necessary for Sound Transit to acquire real property.

This contract provides real estate appraisal services of real property projected for the acquisition necessary for construction and operation of Central Link Light Rail, as well as other miscellaneous appraisal projects for Regional Express and Sounder. Bruce C. Allen and Associates, Inc. will represent Sound Transit as the appraisal expert in mediations, court sessions, dispositions and attorney conferences or any other meeting as required in conjunction with the appraisal.

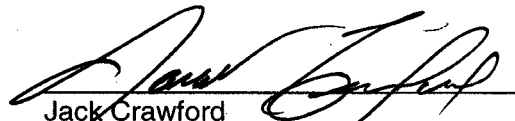
The purpose of this action is to obtain just and equitable evaluation of the fair market value of each property interest to be acquired in a timely manner.

The scope of work includes reviewing opposing party's appraisal and preparing oral or written evaluation and providing True Cost Analyses, which may include technical support or community outreach participation.


Motion:

It is hereby moved by the Finance Committee of the Central Puget Sound Regional Transit Authority that the Chief Executive Officer is authorized to execute a three-year contract with Bruce Allen and Associates, Inc. to provide appraisal services for a total authorized contract amount not to exceed \$1,300,000, for a three-year term, with two, one-year options to extend the contract.

APPROVED by the Finance Committee of the Central Puget Sound Regional Transit Authority at a regular meeting thereof held on August 18, 2005.


Jack Crawford
Finance Committee Chair

ATTEST:


Marcia Walker
Board Administrator