

State of Maine
Master Score Sheet

RFP# 202310214					
Pre-Qualified Vendor List for Certified General Real Property Appraisers					
Bidder Name:		CBRE	Sansoucy Assoc.		
Proposed Cost:		\$200/hr	\$325/hr		
Scoring Sections	Points Available				
Section I: Preliminary Information	Pass/Fail	Pass	Pass		
Section II: Organization Qualifications and Experience	50	35	20		
Section III: Proposed Services	25	25	0		
Section IV: Cost Proposal	25	20	18		
TOTAL	<u>100</u>	<u>80</u>	<u>38</u>		
Bidder Name:					
Proposed Cost:					
Scoring Sections	Points Available				
Section I: Preliminary Information	Pass/Fail				
Section II: Organization Qualifications and Experience	50				
Section III: Proposed Services	25				
Section IV: Cost Proposal	25				
TOTAL	<u>100</u>				

Award Justification Statement
RFP # 202310214
Pre-Qualified Vendor List for Certified General Real Property Appraisers

I. Summary

The Department of Agriculture, Conservation and Forestry (DACF) issued RFP number 202310214 to establish a pre-qualified vendor list (PQVL) of certified general real property appraisers to appraise agricultural land and other real property, and produce appraisal reports that are compliant with the most recent edition of the Uniform Standards of Professional Appraisal Practice (USPAP). The PFAS Fund within the Commissioner's Office needs appraisers to assess the value of agricultural land that DACF will purchase from PFAS-impacted commercial farms.

The RFP was first opened in 2023. Per the terms of the RFP, "After the initial RFP proposal submission deadline, proposal evaluations will be held on an annual basis. Annual proposal submission deadlines will be **11:59 p.m. on the 1st business day of December** while the RFP is active. Proposals are required to be submitted prior to the submission date and time in order to be considered for that enrollment period." The deadline for 2024 was December 2, 2024.

A total of 2 proposals were received. The review panel evaluated each proposal and determined that one bidder should be added to the PQVL of certified general real property appraisers.

The successful firm is:

- CBRE, Inc., Philadelphia office

Notably, CBRE's Boston office is currently on the PQVL. DACF's point of contact at the Boston office no longer works for CBRE. DACF requests guidance on whether to keep CBRE's Boston office on the PQVL.

II. Evaluation Process

Three evaluators reviewed the proposals:

- Beth Valentine, PFAS Fund Director (responsible for overall management of the PFAS Fund). Beth served as RFP Coordinator, Evaluator, Notetaker, and Facilitator.
- Melissa Hamlin, PFAS Fund Management Specialist (responsible for land acquisition and management by the PFAS Fund).

- Dan Grenier, Land Conservation Specialist (responsible for planning and acquisitions for DACF's Bureau of Public Lands)

Each evaluator recorded Individual Evaluation Notes for each proposal. The team met on January 9, 2025, to score the proposals using a consensus-based approach (i.e., using Team Consensus Evaluation Notes and a Master Score Sheet).

The team employed the following scoring rubric:

Section 1, Preliminary Information, 0 potential points

Section II. Organization Qualifications and Experience, 50 potential points

Section III. Proposed Services, 25 potential points

Section IV. Cost Proposal, 25 potential points

III. Qualifications & Experience

CBRE:

- Large firm with significant resources and a dedicated agricultural practice.

IV. Proposed Services

CBRE:

- CBRE will appraise properties anywhere in the State
- CBRE has a Maine Valuation & Advisory Services team and a dedicated national Agricultural Specialty Practice group
- John Lape has more than 17 years of real estate experience
- The proposal includes a thorough description of CBRE's project approach

V. Cost Proposal

CBRE: Lowest cost

VI. Conclusion

The evaluation team is confident that CBRE can perform the work described in the RFP and should be invited to bid on particular projects using the PQVL Mini-Bid Process as the need for appraisal services arises.



**STATE OF MAINE
DEPARTMENT OF AGRICULTURE, CONSERVATION AND FORESTRY**

**Janet T. Mills
Governor**

**Amanda E. Beal
Commissioner**

January 17, 2025

George Sansoucy
Sansoucy Associates
148 Main St.
Lancaster, NH 03584

VIA EMAIL: gsansoucy@sansoucy.com

SUBJECT: Notice of Conditional Pre-Qualified Vendor List Awards under RFP # 202310214,
Pre-Qualified Vendor List for Certified General Real Property Appraisers

Dear Mr. Sansoucy:

This letter concerns the subject Request for Proposals (RFP) issued by the State of Maine Department of Agriculture, Conservation and Forestry for a Pre-Qualified Vendor List for Certified General Real Property Appraisers. The Department has evaluated the proposals received using the evaluation criteria identified in the RFP, and the Department is hereby announcing its conditional award to the following bidder.

- CBRE, Inc.

The bidder listed above has met the requirements for placement on the Pre-Qualified Vendor List. Vendors added to this Pre-Qualified Vendor List (PQVL) are not guaranteed a contract with the State of Maine but are eligible to submit bids on projects issued through the PQVL Mini-Bid Process, as defined in the RFP. Any Notice of Conditional Contract Award resulting from a Mini-Bid award is subject to execution of a written contract. As a result, this Notice does NOT constitute the formation of a contract between the Department and the apparent successful vendor. The vendor shall not acquire any legal or equitable rights relative to contract services until a contract containing terms and conditions acceptable to the Department is executed. The Department further reserves the right to cancel this Notice of Conditional Contract Award and dissolve the Pre-Qualified Vendor List at any time.

As stated in the RFP, following announcement of this award decision, all submissions in response to the RFP are considered public records available for public inspection pursuant to the State of Maine Freedom of Access Act (FOAA). 1 M.R.S. §§ 401 et seq.; 5 M.R.S. § 1825-B (6).

This award decision is conditioned upon final approval by the State Procurement Review Committee. A Statement of Appeal Rights has been provided with this letter; see below.

Thank you for your interest in doing business with the State of Maine.

Sincerely,

A handwritten signature in black ink, appearing to read "Beth Valentine". The signature is fluid and cursive, with the first name "Beth" and last name "Valentine" clearly distinguishable.

Beth Valentine, PFAS Fund Director

Phone: 207-313-0962

Email: beth.valentine@maine.gov

STATEMENT OF APPEAL RIGHTS

Any person aggrieved by an award decision may request an appeal hearing. The request must be made to the Director of the Bureau of General Services, in writing, within 15 days of notification of the contract award as provided in 5 M.R.S. § 1825-E (2) and the Rules of the Department of Administrative and Financial Services, Bureau of General Services, Division of Purchases, Chapter 120, § (2) (2).



**STATE OF MAINE
DEPARTMENT OF AGRICULTURE, CONSERVATION AND FORESTRY**

**Janet T. Mills
Governor**

**Amanda E. Beal
Commissioner**

January 17, 2025

John Lape
CBRE Inc.
50 S. 16th Street, Suite 3000
Philadelphia, PA 19102

VIA EMAIL: john.lape@cbre.com

SUBJECT: Notice of Conditional Pre-Qualified Vendor List Awards under RFP # 202310214,
Pre-Qualified Vendor List for Certified General Real Property Appraisers

Dear Mr. Lape:

This letter concerns the subject Request for Proposals (RFP), issued by the State of Maine Department of Agriculture, Conservation and Forestry for a Pre-Qualified Vendor List for Certified General Real Property Appraisers. The Department has evaluated the proposals received using the evaluation criteria identified in the RFP, and the Department is hereby announcing its conditional award to the following bidder.

- CBRE, Inc.

The bidder listed above has met the requirements for placement on the Pre-Qualified Vendor List. Vendors added to this Pre-Qualified Vendor List (PQVL) are not guaranteed a contract with the State of Maine but are eligible to submit bids on projects issued through the PQVL Mini-Bid Process, as defined in the RFP. Any Notice of Conditional Contract Award resulting from a Mini-Bid award is subject to execution of a written contract. As a result, this Notice does NOT constitute the formation of a contract between the Department and the apparent successful vendor. The vendor shall not acquire any legal or equitable rights relative to contract services until a contract containing terms and conditions acceptable to the Department is executed. The Department further reserves the right to cancel this Notice of Conditional Contract Award and dissolve the Pre-Qualified Vendor List at any time.

As stated in the RFP, following announcement of this award decision, all submissions in response to the RFP are considered public records available for public inspection pursuant to the State of Maine Freedom of Access Act (FOAA). 1 M.R.S. §§ 401 et seq.; 5 M.R.S. § 1825-B (6).

This award decision is conditioned upon final approval by the State Procurement Review Committee. A Statement of Appeal Rights has been provided with this letter; see below.

Thank you for your interest in doing business with the State of Maine.

Sincerely,

A handwritten signature in black ink, appearing to read "Beth Valentine". The signature is fluid and cursive, with the first name "Beth" and last name "Valentine" clearly distinguishable.

Beth Valentine, PFAS Fund Director

Phone: 207-313-0962

Email: beth.valentine@maine.gov

STATEMENT OF APPEAL RIGHTS

Any person aggrieved by an award decision may request an appeal hearing. The request must be made to the Director of the Bureau of General Services, in writing, within 15 days of notification of the contract award as provided in 5 M.R.S. § 1825-E (2) and the Rules of the Department of Administrative and Financial Services, Bureau of General Services, Division of Purchases, Chapter 120, § (2) (2).

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202310214

RFP TITLE: Pre-Qualified Vendor List for Certified General Real Property Appraisers

BIDDER: CBRE

DATE: January 9, 2025

SUMMARY PAGE

Department Name: DACF

Name of RFP Coordinator: Beth Valentine

Names of Evaluators: Melissa Hamlin, Dan Grenier, Beth Valentine

<u>Pass/Fail Criteria</u>	<u>Pass</u>	<u>Fail</u>
Section I. Preliminary Information (Eligibility)		
• Maine-licensed certified general real property appraiser	YES	
•		
•		
<u>Scoring Sections</u> (Edit sections below to match evaluation criteria within RFP)	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	50	35
Section III. Proposed Services	25	25
Section IV. Cost Proposal	25	20
<u>Total Points</u>	<u>100</u>	<u>80</u>

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202310214

RFP TITLE: Pre-Qualified Vendor List for Certified General Real Property Appraisers

BIDDER: CBRE

DATE: January 9, 2025

**OVERVIEW OF SECTION I
Preliminary Information**

Section I. Preliminary Information

Evaluation Team Comments:

- 1) Is the applicant a Maine-licensed Certified General Real Property Appraiser?

YES

- 2) Did the applicant submit a Proposal Cover Page (**Appendix A**)?

YES

- 3) Did the applicant submit a Debarment, Performance and Non-Collusion Certification (**Appendix B**)?

YES

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202310214

RFP TITLE: Pre-Qualified Vendor List for Certified General Real Property Appraisers

BIDDER: CBRE

DATE: January 9, 2025

**EVALUATION OF SECTION II
Organization Qualifications and Experience**

	<u>Points Availabl e</u>	<u>Points Awarde d</u>
Section II. Organization Qualifications and Experience	50	35

Evaluation Team Comments:

- 1) Did the applicant submit an Organization Qualifications and Experience form (**Appendix C**)?

YES

- 2) Did the applicant describe projects that occurred within the past 5 years that reflect the experience and expertise needed in performing the functions described in the "Scope of Services" portion of this RFP, especially appraisals of agricultural land and timberland?

LARGE STAFF, EXTENSIVE EXPERIENCE. SIGNIFICANT SUPPORT FOR PROJECTS. MAINE VALUATION & ADVISORY SERVICES TEAM AND A DEDICATED NATIONAL AGRICULTURAL SPECIALTY PRACTICE GROUP. WELL-VERSED IN STANDARDS.

NONE OF THE EXAMPLES INCLUDED APPRAISALS OF AGRICULTURAL LAND OR TIMBERLAND. ALL COMMERCIAL PROJECTS IN NJ.

- 3) Will the applicant employ subcontractors? If so, did the applicant include a list of subcontractors?

NOT ANTICIPATED BUT WILL ENGAGE AS NEEDED FOR SPECIALIZED SERVICES

- 4) Did the applicant include a list of all current/recent litigation or otherwise comment on litigation within the past 5 years?

INCLUDED A STATEMENT: NOTHING PENDING IS LIKELY TO HAVE A MATERIALLY ADVERSE EFFECT ON CBRE'S ABILITY TO PERFORM SERVICES RELATED TO THIS RFP.

- 5) Did the applicant include a copy of their Certificate of Insurance?

YES

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202310214

RFP TITLE: Pre-Qualified Vendor List for Certified General Real Property Appraisers

BIDDER: CBRE

DATE: January 9, 2025

**EVALUATION OF SECTION III
Proposed Services**

	<u>Points Availabl e</u>	<u>Points Awarde d</u>
Section III. Proposed Services	25	25

Evaluation Team Comments:

- 1) Geographic scope of practice (e.g., Statewide, selected counties):

STATEWIDE

- 2) Did the bidder describe the process they will employ for conducting appraisals?

YES. DESCRIBED THE APPRAISAL PROCESS & VALUATION PROCESS, WITH MINIMAL MENTION OF AGRICULTURE, THOUGH (PP. 16-20).

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202310214

RFP TITLE: Pre-Qualified Vendor List for Certified General Real Property Appraisers

BIDDER: CBRE

DATE: January 9, 2025

**EVALUATION OF SECTION IV
Cost Proposal**

	<u>Points Availabl e</u>	<u>Points Awarde d</u>
Section IV. Cost Proposal	25	20

Evaluation Team Comments:

Range of \$80-275/hour. \$200/hr for an appraiser. Other fees for other services.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202310214

RFP TITLE: Pre-Qualified Vendor List for Certified General Real Property Appraisers

BIDDER: Sansoucy Associates

DATE: January 9, 2025

SUMMARY PAGE

Department Name: DACF

Name of RFP Coordinator: Beth Valentine

Names of Evaluators: Melissa Hamlin, Dan Grenier, Beth Valentine

<u>Pass/Fail Criteria</u>	<u>Pass</u>	<u>Fail</u>
Section I. Preliminary Information (Eligibility)		
• Maine-licensed certified general real property appraiser	YES	
•		
•		
<u>Scoring Sections</u> (Edit sections below to match evaluation criteria within RFP)	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	50	20
Section III. Proposed Services	25	0
Section IV. Cost Proposal	25	18
<u>Total Points</u>	<u>100</u>	<u>38</u>

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202310214

RFP TITLE: Pre-Qualified Vendor List for Certified General Real Property Appraisers

BIDDER: Sansoucy Associates

DATE: January 9, 2025

**OVERVIEW OF SECTION I
Preliminary Information**

Section I. Preliminary Information

Evaluation Team Comments:

- 1) Is the applicant a Maine-licensed Certified General Real Property Appraiser?

YES

- 2) Did the applicant submit a Proposal Cover Page (**Appendix A**)?

YES

- 3) Did the applicant submit a Debarment, Performance and Non-Collusion Certification (**Appendix B**)?

YES

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202310214

RFP TITLE: Pre-Qualified Vendor List for Certified General Real Property Appraisers

BIDDER: Sansoucy Associates

DATE: January 9, 2025

**EVALUATION OF SECTION II
Organization Qualifications and Experience**

	<u>Points Availabl e</u>	<u>Points Awarde d</u>
Section II. Organization Qualifications and Experience	50	20

Evaluation Team Comments:

- 1) Did the applicant submit an Organization Qualifications and Experience form (**Appendix C**)?

YES

- 2) Did the applicant describe projects that occurred within the past 5 years that reflect the experience and expertise needed in performing the functions described in the "Scope of Services" portion of this RFP, especially appraisals of agricultural land and timberland?

Extensive engineering background, urban planning, industrial wastewater, design & construction. Highlighted projects are all hydroelectric projects. No obvious agricultural or timberland experience. Good experience but not relevant.

- 3) Will the applicant employ subcontractors? If so, did the applicant include a list of subcontractors?

UNKNOWN

- 4) Did the applicant include a list of all current/recent litigation or otherwise comment on litigation within the past 5 years?

NO

- 5) Did the applicant include a copy of their Certificate of Insurance?

YES

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202310214

RFP TITLE: Pre-Qualified Vendor List for Certified General Real Property Appraisers

BIDDER: Sansoucy Associates

DATE: January 9, 2025

**EVALUATION OF SECTION III
Proposed Services**

	<u>Points Availabl e</u>	<u>Points Awarde d</u>
Section III. Proposed Services	25	0

Evaluation Team Comments:

- 1) Geographic scope of practice (e.g., Statewide, selected counties):

UNKNOWN

- 2) Did the bidder describe the process they will employ for conducting appraisals?

NO

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202310214

RFP TITLE: Pre-Qualified Vendor List for Certified General Real Property Appraisers

BIDDER: Sansoucy Associates

DATE: January 9, 2025

**EVALUATION OF SECTION IV
Cost Proposal**

	<u>Points Availabl e</u>	<u>Points Awarde d</u>
Section IV. Cost Proposal	25	18

Evaluation Team Comments:

Range of \$150-400. \$325/hr for appraiser, other rates for other services

RFP #: 202310214

RFP TITLE: PRE-QUALIFIED VENDOR LIST FOR CERTIFIED GENERAL REAL PROPERTY APPRAISERS

BIDDER NAME: CBRE, Inc. (Philadelphia office)

DATE: January 7, 2025

EVALUATOR NAME: Beth Valentine

EVALUATOR DEPARTMENT: Department of Agriculture, Conservation & Forestry

Instructions: *The purpose of this form is to record proposal review notes written by **individual** evaluators for this Request for Proposals (RFP) process. It is **required** that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department's RFP Coordinator or Lead Evaluator for this RFP.*

Individual Evaluator Comments:

- 1) Is the applicant a Maine-licensed Certified General Real Property Appraiser? **John David Lape's certification was pending as of the submittal date. Pending number CG5290. He was licensed as of 12/19/24 per the Department of Professional and Financial Regulation [website](#).**
- 2) Did the applicant submit a Proposal Cover Page (**Appendix A**)? **YES**
- 3) Did the applicant submit a Debarment, Performance and Non-Collusion Certification (**Appendix B**)? **YES**
- 4) Did the applicant submit an Organization Qualifications and Experience (**Appendix C**)? **YES**
- 5) Please record your reactions to Appendix C, Qualifications and Experience Form and related attachments, using the following categories:
 - **P (Positive):** Indicates what the evaluator sees as a strength.
 - **Largest commercial real estate services and investment firm in the world**
 - **Large staff, well-versed in appraising all property types, access to latest technology & software, robust in-house research & GIS departments**
 - **Have a Maine Valuation & Advisory Services team & dedicated national Agricultural Specialty Practice group**
 - **N (Negative):** Indicates what the evaluator sees as a weakness.
 - **None of the examples included appraisals of agricultural land or timberland.**
 - **Q (Question):** Indicates the evaluator is uncertain about the information presented.

- **Lappe has 17 years of real estate & consulting experience, 12 as a Right of Way specialist.**
 - **I (Interesting):** Indicates the evaluator finds the information interesting (i.e. when proposal provides an innovative approach or solution – “outside the box”).
- 6) Geographic scope of practice (e.g., Statewide, selected counties): **STATEWIDE**
- 7) Did the applicant include a copy of their Certified General Real Property Appraiser license? **INCLUDED SCREENSHOT OF PENDING STATUS; BECAME EFFECTIVE 12/19/24.**
- 8) Will the applicant employ subcontractors? **NOT ANTICIPATED BUT WILL ENGAGE AS NEEDED FOR SPECIALIZED SERVICES**
If so, did the applicant include a list of subcontractors?
- 9) Did the applicant include a list of all current/recent litigation or otherwise comment on litigation within the past 5 years? **INCLUDED A STATEMENT: NOTHING PENDING IS LIKELY TO HAVE A MATERIALLY ADVERSE EFFECT ON CBRE'S ABILITY TO PERFORM SERVICES RELATED TO THIS RFP.**
- 10) Did the applicant include a copy of their Certificate of Insurance? **YES**
- 11) Did the applicant include a Rate Sheet? **YES**
Comments: **\$200/HR FOR AN APPRAISER. OTHER FEES FOR OTHER SERVICES.**

RFP #: 202310214

RFP TITLE: PRE-QUALIFIED VENDOR LIST FOR CERTIFIED GENERAL REAL PROPERTY APPRAISERS

BIDDER NAME: Sansoucy Associates

DATE: January 7, 2025

EVALUATOR NAME: Beth Valentine

EVALUATOR DEPARTMENT: Department of Agriculture, Conservation & Forestry

Instructions: *The purpose of this form is to record proposal review notes written by **individual** evaluators for this Request for Proposals (RFP) process. It is **required** that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department's RFP Coordinator or Lead Evaluator for this RFP.*

Individual Evaluator Comments:

- 1) Is the applicant a Maine-licensed Certified General Real Property Appraiser? **YES**
- 2) Did the applicant submit a Proposal Cover Page (**Appendix A**)? **YES**
- 3) Did the applicant submit a Debarment, Performance and Non-Collusion Certification (**Appendix B**)? **YES**
- 4) Did the applicant submit an Organization Qualifications and Experience (**Appendix C**)? **YES (CITED TO RESUME, CLIENTS 52, 154 & 202, ALL HYDROELECTRIC PROJECTS).**
- 5) Please record your reactions to Appendix C, Qualifications and Experience Form and related attachments, using the following categories:
 - **P (Positive):** Indicates what the evaluator sees as a strength.
 - **Depth and breadth of experience**
 - **CE: Intro to Conservation Easement Valuation**
 - **N (Negative):** Indicates what the evaluator sees as a weakness.
 - **No agricultural experience. Heavy focus on energy, industrial, and wastewater properties.**
 - **All example projects are hydroelectric projects**
 - **Q (Question):** Indicates the evaluator is uncertain about the information presented.
 - **I (Interesting):** Indicates the evaluator finds the information interesting (i.e. when proposal provides an innovative approach or solution – “outside the box”).
- 6) Geographic scope of practice (e.g., Statewide, selected counties): **UNKNOWN**

- 7) Did the applicant include a copy of their Certified General Real Property Appraiser license? **YES**
- 8) Will the applicant employ subcontractors? **UNKNOWN**
If so, did the applicant include a list of subcontractors?
- 9) Did the applicant include a list of all current/recent litigation or otherwise comment on litigation within the past 5 years? **NO**
- 10) Did the applicant include a copy of their Certificate of Insurance? **YES**
- 11) Did the applicant include a Rate Sheet? **YES**
Comments: **\$325/HR FOR APPRAISER, OTHER RATES FOR OTHER SERVICES**

RFP #: 202310214

RFP TITLE: PRE-QUALIFIED VENDOR LIST FOR CERTIFIED GENERAL REAL PROPERTY APPRAISERS

BIDDER NAME: CBRE, Inc.

DATE: 1/9/25

EVALUATOR NAME: Melissa Hamlin

EVALUATOR DEPARTMENT: Department of Agriculture, Conservation & Forestry

Instructions: *The purpose of this form is to record proposal review notes written by **individual** evaluators for this Request for Proposals (RFP) process. It is **required** that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department's RFP Coordinator or Lead Evaluator for this RFP.*

Individual Evaluator Comments:

- 1) Is the applicant a Maine-licensed Certified General Real Property Appraiser? Yes
- 2) Did the applicant submit a Proposal Cover Page (**Appendix A**)? Yes
- 3) Did the applicant submit a Debarment, Performance and Non-Collusion Certification (**Appendix B**)? Yes
- 4) Did the applicant submit an Organization Qualifications and Experience (**Appendix C**)? Yes
- 5) Please record your reactions to Appendix C, Qualifications and Experience Form and related attachments, using the following categories:
 - **P** (Positive): Indicates what the evaluator sees as a strength.
 - **N** (Negative): Indicates what the evaluator sees as a weakness.
 - **Q** (Question): Indicates the evaluator is uncertain about the information presented.
 - **I** (Interesting): Indicates the evaluator finds the information interesting (i.e. when proposal provides an innovative approach or solution – “outside the box”).
- 6) Geographic scope of practice (e.g., Statewide, selected counties): CBRE is able to provide valuation services throughout the entire State of Maine.
- 7) Did the applicant include a copy of their Certified General Real Property Appraiser license? Yes (pending fingerprints)

8) Will the applicant employ subcontractors? In general, no. None anticipated. If the need arose, would consult with DACF about any potential subcontracts.
If so, did the applicant include a list of subcontractors?

9) Did the applicant include a list of all current/recent litigation or otherwise comment on litigation within the past 5 years? Yes. Very large firm, publicly traded (SEC disclosure regs apply); ability to perform will not be materially affected by any adverse litigation, in the firm's opinion.

10) Did the applicant include a copy of their Certificate of Insurance? Yes

11) Did the applicant include a Rate Sheet? Yes
Comments:

This proposal is similar to the one received from CBRE last year. It reflects the very large nature of the company, with a thorough proposal template mostly customized for this RFP. It has the same curious focus on rights-of-way and eminent domain, suggesting that the professionals are more accustomed to government work with a much different focus than that of the PFAS Fund.

P: The resources that are clearly available to this global firm help assure that a quality product can be provided. This includes a dedicated practice group for agriculture and a defined quality and risk management protocol involving internal review by an MAI appraiser.

Q: On the other hand, the branch office is based in Pennsylvania/New Jersey region. Considering the smaller scale of contract that a (typically) residential appraisal likely involves, will site inspections be conducted at all? If so, is it worth the cost? Who are the northern New England-based appraisers with entrenched knowledge of the Maine markets, and why aren't they specifically listed or identified in this RFP?

N: The example projects, generally being oversight and participation in appraisals involving large land tracts with several parcels – often commercial, some residential – and often for litigation purposes, are of a very different nature than the appraisals the Fund seeks, which are often single-owner residential, not adverse, and set within a landscape of unique comparables, which are often conservation properties.

RFP #: 202310214

RFP TITLE: PRE-QUALIFIED VENDOR LIST FOR CERTIFIED GENERAL REAL PROPERTY APPRAISERS

BIDDER NAME: George E. Sansoucy, P.E. LLC, d/b/a Sansoucy Associates

DATE: 1/9/25

EVALUATOR NAME: Melissa Hamlin

EVALUATOR DEPARTMENT: Department of Agriculture, Conservation & Forestry

Instructions: *The purpose of this form is to record proposal review notes written by individual evaluators for this Request for Proposals (RFP) process. It is required that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department's RFP Coordinator or Lead Evaluator for this RFP.*

Individual Evaluator Comments:

- 1) Is the applicant a Maine-licensed Certified General Real Property Appraiser? Yes
- 2) Did the applicant submit a Proposal Cover Page (**Appendix A**)? Yes
- 3) Did the applicant submit a Debarment, Performance and Non-Collusion Certification (**Appendix B**)? Yes
- 4) Did the applicant submit an Organization Qualifications and Experience (**Appendix C**)? Yes
- 5) Please record your reactions to Appendix C, Qualifications and Experience Form and related attachments, using the following categories:
 - **P** (Positive): Indicates what the evaluator sees as a strength.
 - **N** (Negative): Indicates what the evaluator sees as a weakness.
 - **Q** (Question): Indicates the evaluator is uncertain about the information presented.
 - **I** (Interesting): Indicates the evaluator finds the information interesting (i.e. when proposal provides an innovative approach or solution – “outside the box”).
- 6) Geographic scope of practice (e.g., Statewide, selected counties): A statement identifying the geographic scope of practice was not found; the resume lists past projects throughout the state.
- 7) Did the applicant include a copy of their Certified General Real Property Appraiser license? Yes

8) Will the applicant employ subcontractors? A statement discussing subcontractors was not found

If so, did the applicant include a list of subcontractors?

9) Did the applicant include a list of all current/recent litigation or otherwise comment on litigation within the past 5 years? A statement discussing litigation was not found

10) Did the applicant include a copy of their Certificate of Insurance? Yes

11) Did the applicant include a Rate Sheet? Yes

Comments:

P: The applicant has been exposed to conservation easements through an introductory course

I: The applicant is clearly experienced with valuations involving all sorts of utilities and other large projects and matters that may involve litigation.

N: The proposal did not articulate how his vast experience in industrial valuations translates to the types of appraisals the Fund requires, which are often single-family farmsteads with comparables that may or may not be part farm and forest, and may or may not be encumbered with perpetual conservation easements.

RFP #: 202310214

RFP TITLE: PRE-QUALIFIED VENDOR LIST FOR CERTIFIED GENERAL REAL PROPERTY APPRAISERS

BIDDER NAME: CBRE, Inc.

DATE: 01/02/2025

EVALUATOR NAME: Daniel Grenier

EVALUATOR DEPARTMENT: Department of Agriculture, Conservation & Forestry

Instructions: *The purpose of this form is to record proposal review notes written by **individual** evaluators for this Request for Proposals (RFP) process. It is **required** that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department's RFP Coordinator or Lead Evaluator for this RFP.*

Individual Evaluator Comments:

- 1) Is the applicant a Maine-licensed Certified General Real Property Appraiser?
Yes, certification expires 12/31/2025. Update provided by Beth Valintine.
- 2) Did the applicant submit a Proposal Cover Page (**Appendix A**)? YES
- 3) Did the applicant submit a Debarment, Performance and Non-Collusion Certification (**Appendix B**)? YES
- 4) Did the applicant submit an Organization Qualifications and Experience (**Appendix C**)? YES
- 5) Please record your reactions to Appendix C, Qualifications and Experience Form and related attachments, using the following categories:
 - **P** (Positive): Indicates what the evaluator sees as a strength.

Global real estate company that is highly rated and publicly traded. They have a large staff with extensive real estate valuation experience. Appendix C outlines significant built-in support for projects.

States experience in local Maine markets around valuation of rural and agricultural lands. And significant experience in valuation on the team.

The team is USPAP versed / continuing education/ yellow book.

Team lead (John Lapse) is a senior associate with 17 years' experience with valuation of real estate focused on ROW and eminent domain type work.

Three projects are shared with descriptions of each. They are all appraisal projects for NJ DOT associated with development.

Proposal connects dots on how process will work from their end and expectations along the way of the project. ...shares how they work via outlines – project approach and methods. The proposal also describes their understanding of the scope of work in a paragraph.

- **N** (Negative): Indicates what the evaluator sees as a weakness.
- **Q** (Question): Indicates the evaluator is uncertain about the information presented.

Maine Valuation & Advisory Services team? Does this exist or is this new Maine based project?

- **I** (Interesting): Indicates the evaluator finds the information interesting (i.e. when proposal provides an innovative approach or solution – “outside the box”).

6) Geographic scope of practice (e.g., Statewide, selected counties):

The proposal stated they have capacity to provide valuations and services statewide – Page 15.

7) Did the applicant include a copy of their Certified General Real Property Appraiser license?

Pending status was shared and then updated with license was provided by SOM.

8) Will the applicant employ subcontractors? NO; subcontractors are not anticipated. If so, did the applicant include a list of subcontractors? No list provided. However:

“...however, if it is determined that subcontracting opportunities become available relative to this contract, CBRE will engage a subcontractor as needed for specialized services. CBRE will want to have dialogue with the State of Maine Department of Agriculture, Conservation and Forestry about the specific circumstances that may involve the need for a subcontractor and appropriate contracting structure.” Page 12

9) Did the applicant include a list of all current/recent litigation or otherwise comment on litigation within the past 5 years?

A comment was provided regarding litigation stating that information is disclosed in their SEC filings. They feel that there are no current litigation that impact their ability to perform services in the RFP.

10) Did the applicant include a copy of their Certificate of Insurance? YES

11) Did the applicant include a Rate Sheet? YES
Comments: Hourly based on role involved.

RFP #: 202310214

RFP TITLE: PRE-QUALIFIED VENDOR LIST FOR CERTIFIED GENERAL REAL PROPERTY APPRAISERS

BIDDER NAME: George E. Sansoucy, P.E. LLC, d/b/a Sansoucy Associates

DATE: 01/01/2025

EVALUATOR NAME: Daniel Grenier

EVALUATOR DEPARTMENT: Department of Agriculture, Conservation & Forestry

Instructions: *The purpose of this form is to record proposal review notes written by **individual** evaluators for this Request for Proposals (RFP) process. It is **required** that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department's RFP Coordinator or Lead Evaluator for this RFP.*

Individual Evaluator Comments:

- 1) Is the applicant a Maine-licensed Certified General Real Property Appraiser?

YES, see Professional Qualifications of Resume page 3. Copy of State license as Certified General Appraiser included (expires 12/31/2025)

- 2) Did the applicant submit a Proposal Cover Page (**Appendix A**)?

YES.

- 3) Did the applicant submit a Debarment, Performance and Non-Collusion Certification (**Appendix B**)? YES

- 4) Did the applicant submit an Organization Qualifications and Experience (**Appendix C**)?

YES, referred to his attached Resume as response to a request for statement of qualifications.

- 5) Please record your reactions to Appendix C, Qualifications and Experience Form and related attachments, using the following categories:

- **P** (Positive): Indicates what the evaluator sees as a strength.

Extensive engineering background in civil engineering/environmental engineering with emphasis on urban planning and infrastructure. ...50 years as an engineer.

Managed projects concerning municipal and industrial wastewater, water treatment systems, environmental impact work including systems design and construction. ...all aspects of engineering planning, design, and construction.

The applicant started his own consulting engineering and appraisal firm (~ 45 years in business).

Work by the firm is focused on hydro electric plants throughout NE and NY.

Also included consulting and valuation assignments for federal and state governments, private enterprises, town, cities, etc.

Since 1990, has been engaged in valuation, appraisal, assessments for the valuation of public and private utility property throughout the US. ... include electric, gas, water, telephone, cable, oil pipelines, electric generation plants of all kinds, nuclear plants, renewable, energy facilities, etc.

Work has included all levels of coordination with agencies.

Sansoucy describes an integrated background - engineering, design, development, and valuation and appraisal standpoint on all issues regarding utilities, utility policy, power projects, storage facilities, civil design and development. This also includes environmental assessments and impacts reporting and regulatory planning.

Sansoucy shows extensive continuing education and professional development through time in his topic matter.

Extensive project work across the US (with a clear focus in NE and NY) including valuation projects associated with energy and utilities. List of more than 300 specific projects shared.

- **N (Negative):** Indicates what the evaluator sees as a weakness.
- **Q (Question):** Indicates the evaluator is uncertain about the information presented.

I see little to no direct attempt to describe how the past work connects to the proposed appraisal work with leaves questions.

Three Maine based clients are listed with limited description of the projects. Two appear to be hydro dam valuation projects (Livermore Falls & Moscow); however, the scope of projects, timing, and relevance to the RFP is not directly explained in the application.

- **I (Interesting):** Indicates the evaluator finds the information interesting (i.e. when proposal provides an innovative approach or solution – “outside the box”).

6) Geographic scope of practice (e.g., Statewide, selected counties):

Across the US, but a clear focus within NE and NY. A list of 337 projects was shared in the application.

7) Did the applicant include a copy of their Certified General Real Property Appraiser license? YES

8) Will the applicant employ subcontractors? NO, but also not clear when looking at rate schedule if this is in-house staff or contacted.

If so, did the applicant include a list of subcontractors? NO list is provided.

9) Did the applicant include a list of all current/recent litigation or otherwise comment on litigation within the past 5 years? NO

10) Did the applicant include a copy of their Certificate of Insurance?
YES

11) Did the applicant include a Rate Sheet? YES
Comments: Rates are broken down based on personnel type.



STATE OF MAINE
DEPARTMENT OF AGRICULTURE
CONSERVATION AND FORESTRY

Janet T. Mills
Governor

Amanda E. Beal
Commissioner

AGREEMENT AND DISCLOSURE STATEMENT
RFP #: 202310214
RFP TITLE: PQVL for Certified General Real Property Appraisers

I, **Beth Valentine,** accept the offer to become a member of the Request for Proposals (RFP) Evaluation Team for the State of Maine Department of Agriculture, Conservation and Forestry. I do hereby accept the terms set forth in this agreement AND hereby disclose any affiliation or relationship I may have in connection with a bidder who has submitted a proposal to this RFP.

Neither I nor any member of my immediate family have a personal or financial interest, direct or indirect, in the bidders whose proposals I will be reviewing. "Interest" may include, but is not limited to: current or former ownership in the bidder's company; current or former Board membership; current or former employment with the bidder; current or former personal contractual relationship with the bidder (example: paid consultant); and/or current or former relationship to a bidder's official which could reasonably be construed to constitute a conflict of interest (personal relationships may be perceived by the public as a potential conflict of interest).

I have not advised, consulted with or assisted any bidder in the preparation of any proposal submitted in response to this RFP nor have I submitted a letter of support or similar endorsement.

I understand and agree that the evaluation process is to be conducted in an impartial manner without bias or prejudice. In this regard, I hereby certify that, to the best of my knowledge, there are no circumstances that would reasonably support a good faith charge of bias. I further understand that in the event a good faith charge of bias is made, it will rest with me to decide whether I should be disqualified from participation in the evaluation process.

I agree to hold confidential all information related to the contents of Requests for Proposals presented during the review process until such time as the Department formally releases the award decision notices for public distribution.

December 9, 2024

Signature

Date



STATE OF MAINE
DEPARTMENT OF AGRICULTURE
CONSERVATION AND FORESTRY

Janet T. Mills
Governor

Amanda E. Beal
Commissioner

AGREEMENT AND DISCLOSURE STATEMENT
RFP #: 202310214
RFP TITLE: PQVL for Certified General Real Property Appraisers

I, Melissa Hamlin, accept the offer to become a member of the Request for Proposals (RFP) Evaluation Team for the State of Maine Department of Agriculture, Conservation and Forestry. I do hereby accept the terms set forth in this agreement AND hereby disclose any affiliation or relationship I may have in connection with a bidder who has submitted a proposal to this RFP.

Neither I nor any member of my immediate family have a personal or financial interest, direct or indirect, in the bidders whose proposals I will be reviewing. "Interest" may include, but is not limited to: current or former ownership in the bidder's company; current or former Board membership; current or former employment with the bidder; current or former personal contractual relationship with the bidder (example: paid consultant); and/or current or former relationship to a bidder's official which could reasonably be construed to constitute a conflict of interest (personal relationships may be perceived by the public as a potential conflict of interest).

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Signature

1/9/25

Date



STATE OF MAINE
DEPARTMENT OF AGRICULTURE
CONSERVATION AND FORESTRY

Janet T. Mills
Governor

Amanda E. Beal
Commissioner

AGREEMENT AND DISCLOSURE STATEMENT
RFP #: 202310214

RFP TITLE: PQVL for Certified General Real Property Appraisers

I, Daniel Grenier accept the offer to become a member of the Request for Proposals (RFP) Evaluation Team for the State of Maine Department of Agriculture, Conservation and Forestry. I do hereby accept the terms set forth in this agreement AND hereby disclose any affiliation or relationship I may have in connection with a bidder who has submitted a proposal to this RFP.

Neither I nor any member of my immediate family have a personal or financial interest, direct or indirect, in the bidders whose proposals I will be reviewing. "Interest" may include, but is not limited to: current or former ownership in the bidder's company; current or former Board membership; current or former employment with the bidder; current or former personal contractual relationship with the bidder (example: paid consultant); and/or current or former relationship to a bidder's official which could reasonably be construed to constitute a conflict of interest (personal relationships may be perceived by the public as a potential conflict of interest).

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I agree to hold confidential all information related to the contents of Requests for Proposals presented during the review process until such time as the Department formally releases the award decision notices for public distribution.

Signature

12/16/2024

Date