

**REQUEST FOR
PROPOSALS**

COACHELLA VALLEY WATER DISTRICT

(RFP 23-036)

**RIGHT OF WAY SERVICES FOR
NORTH CATHEDRAL CITY REGIONAL
STORMWATER PROJECT**

Prepared For:



**COACHELLA VALLEY
WATER DISTRICT**

Due: October 16th, 2023

Prepared By :





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October 16, 2023

Chris Bogan, Right of Way Supervisor
Coachella Valley Water District
75-515 Hovley Lane East
Palm Desert, CA 92211
(Emailed to: CBogan@cvwd.org)

Subject: Clark Land Resources' Proposal for "*Right of Way Services for North Cathedral City Regional Stormwater Project*"

Dear Evaluation Team,

Clark Land Resources, Inc. (Clark Land) — a California Department of General Services Small Business (SB) and a California Public Utilities Commission Certified Women Business Enterprise (WBE) — appreciates this opportunity to provide the Coachella Valley Water District (CVWD) our proposal for the subject contract. *We are excited to bring our solutions-oriented team to assist CVWD as we have done with other municipalities in the Inland Empire, San Diego, and Imperial Valley regions.*

The quality of Clark Land's work is demonstrated by the continuing renewal of contracts for real property/right of way services. Many of Clark Land's contracts started several years ago, with some dating back over a decade, and are ongoing due to the trust the client has developed in the Clark Land team to:

- Protect the property rights of the client,
- Maintain a positive image of the public entity, and
- Treat property owners with dignity and respect to foster and maintain positive relationships with property owners on behalf of the client.

Clark Land has provided right of way services to the City of Moreno Valley, City of San Diego, City of Irvine, City of Carlsbad, Elsinore Valley Municipal Water District, San Diego County Water Authority, Carlsbad Municipal Water District, Rainbow Municipal Water District, San Diego Gas & Electric, and SoCalGas. *Due to our reputation for high ethical standards and performing work with impeccable integrity, Clark Land has grown to be one of the largest right of way and relocation companies in Southern California.*

We offer CVWD the following benefits in selecting the Clark Land team:

Unique Qualifications/Mutual Missions: Clark Land's mission is to raise the next generation of right of way agents in the ethical standards of right of way services. Clark Land strictly adheres to the IRWA's Code of Ethics, Rules, and Standards in performing all right of way related services. At Clark Land, our vision, mission, and core values bear a striking resemblance to those upheld by CVWD. This convergence of purpose and principles is what fuels our unwavering commitment to excellence. We consider it a profound privilege to extend our support to CVWD as you diligently pursue your mission of providing safe, reliable water services for generations.

CVWD Experience: Clark Land provided right of way acquisition services acquiring right of way across lands under Bureau of Indian Affairs (BIA) jurisdiction on the Avenue 66 Transmission Main, Phase 2 Project and are familiar with CVWD's procedures and protocols.

Mailing Address

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Availability and Commitment of Clark Land's Professional Team: CVWD needs a team that will be responsive and who is familiar with the International Right of Way Association's (IRWA) standard of care as well as knowledge of federal, state, and local regulations with regards to acquiring fee title acquisitions and permanent access easements. Vince McCaw, SR/WA, R/W-RAC, our proposed Project Manager, has 20+ years of project management experience in Southern California. Supporting Vince are over 60 Clark Land staff working in Southern California. Of those, over 35 are certified and/or licensed professionals. Our staff hold California licenses as Real Estate Salespersons or Brokers and Notaries as well as right of way professional certifications from the IRWA. Clark Land has acquired over 1,000+ temporary/permanent easements and cleared over 2,000+ encroachment issues for our clients.

Multi-Lingual Team: Several of our Clark Land team members speak Spanish, aiding in communication with potential property owners for acquisition assistance. We also have resources available to help with interpretations in other languages.

High Standards are Our Only Standards: Clark Land is a Right of Way Consultants Council (ROWCC) member firm. The ROWCC is an organization that grew out of a desire for professionals in the right of way industry to exchange ideas and information efficiently and to develop and promote standards for our industry. Clark Land's President/Chief Executive Officer, Linda Clark, RWP, previously served on the Board of Directors.

Expert Subconsultants: Clark Land is fortunate to have *Hendrickson Appraisal Company, Inc.* providing appraisal services. Clark Land has worked with them on several projects and they have appraised numerous properties over the past 20 years as part of on-call contracts with numerous public agencies and have provided budgetary estimates and consulting on various valuation matters. Review appraisals will be provided by the *Santolucito-Dore Group, Inc.* They are highly experienced in real estate valuation and consultation, and have established relationships with many public agencies, utility companies, and private firms throughout California.

Our proposal is rooted in a genuine desire to enhance the well-being of all stakeholders and provides the professional qualifications of our staff and proven successful approach working on similar projects.

We look forward to further discussing our qualifications with you. Please feel free to contact our Principal in Charge, Sue Cope, SR/WA, by email at sue.cope@clarklandresources.com or by phone at (760) 758-1562, with any questions you may have about this proposal. We eagerly anticipate the opportunity to contribute our expertise and passion to CVWD in the near future.

Thank you for your time and consideration,



Linda L. Clark, RWP
President/Chief Executive Officer



Section 1 | General Information

As a dedicated right of way acquisition company with a proven track record in delivering exceptional real estate solutions, Clark Land is eager to bring our expertise to the successful execution of the North Cathedral City Regional Stormwater Project. Clark Land currently has the in-house resources to perform all work required for each of the Project Tasks listed in the RFP, except in those specialized areas of work, Appraisal and Review Appraisal, that will be sub-contracted. Our team of seasoned professionals understands the intricacies of the real estate landscape in CVWD's service territory and is committed to upholding the highest standards of professionalism and excellence. The primary point of contact for all correspondence related to this proposal will be our Project Manager, Vince McCaw, SR/WA, R/W-RAC.

We look forward to the opportunity to contribute to CVWD's growth and welcome the chance to further discuss our capabilities and to explore how our partnership can drive positive outcomes for your project.



Vince McCaw, SR/WA, R/W-RAC

Project Manager

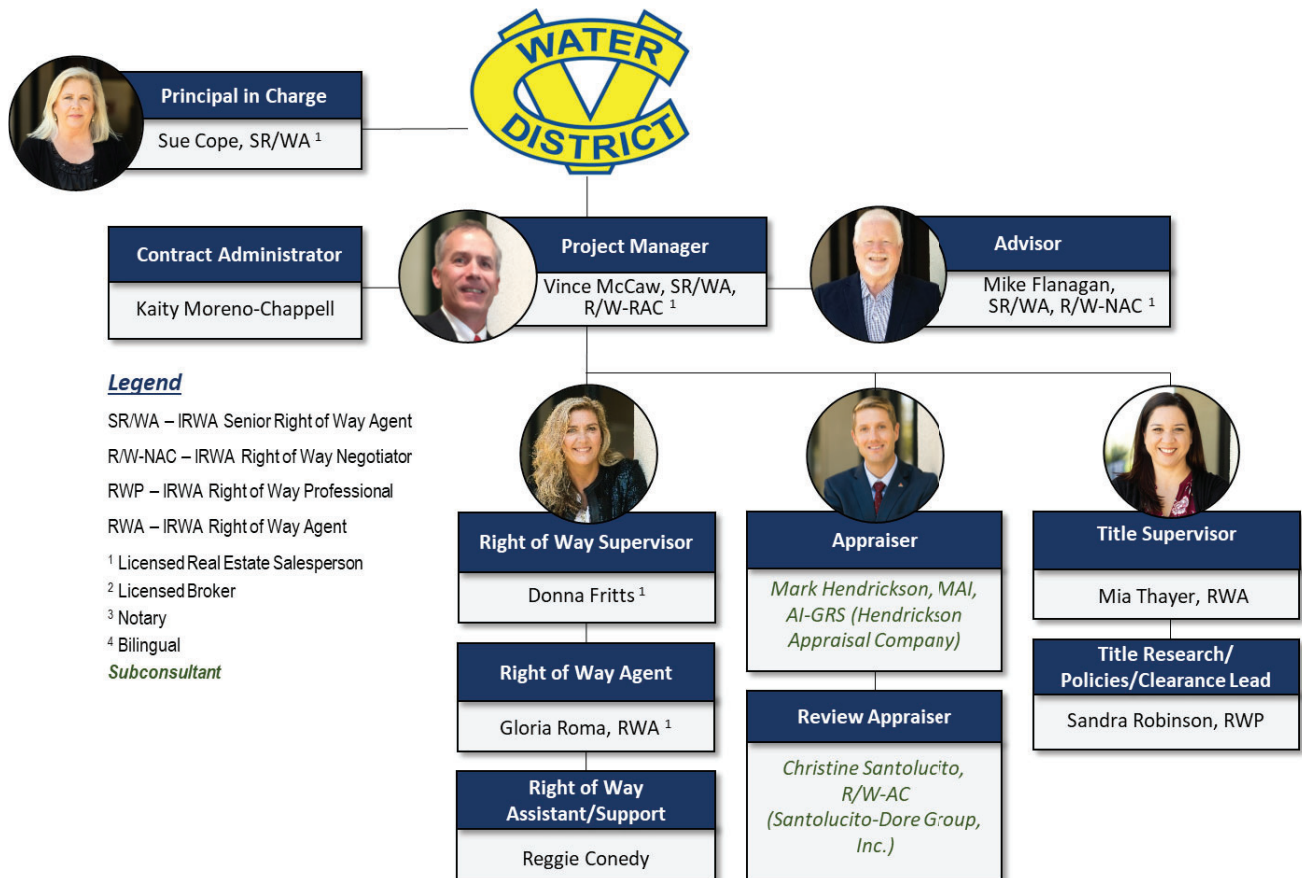
Phone: (619) 921-4556

Email: vince.mccaw@clarklandresources.com

Section 2 | Project Team Qualifications

Clark Land's project team was assembled to provide you with expert right of way professionals who have proven track records for completing acquisitions to meet CVWD's project goals, who can protect CVWD's property rights, as well as protect CVWD's reputation for negotiating in a fair and ethical manner.

The Org Chart below provides the name and role of each team member who will commit a substantial percentage of their time to this project and shows the reporting structure of the project team, including sub-consultants.



Relevant Experience of Clark Land's Project Team

The CVWD requires a consultant that knows, and understands, the regulatory requirements necessary for the lawful completion of acquisitions. Although anyone can read the rules, it takes a local Southern California team that is adaptive and flexible to communicate effectively and meet the CVWD's schedule and budget goals. Our team has diverse expertise offering a wide-range of turn-key services from one resource, allowing Clark Land to scale to any project size or type. For each key person identified in the Org Chart, we have provided relevant experience and performance on similar projects in which they have played a primary role.

Vince McCaw,
SR/WA, R/W-RAC
Project Manager



Vince has over **30 years** of right of way experience and **20 years** of experience as a Project Manager on a variety of projects. He is well organized, goal oriented, and customer focused. Vince is an analytical problem solver and can anticipate issues and develop alternative courses of action to resolve concerns and improve efficiency.

Project Experience:

Real Property Manager, City of Escondido, Escondido, CA:

As Real Property Manager, Vince was responsible for the services and activities of the City's real property program including property appraisal, acquisition, title, escrow,

relocation, asset management, leasing, eminent domain, surplus property sales, assisting with capital improvement projects and related activities and operations. He directed, coordinated, and reviewed the work plan for assigned real property program services and activities; assigned work activities and projects; monitored workflow; reviewed and evaluated work products, methods, and procedures. Vince prepared and reviewed agreements, easements, rights of entry, as well as interpreted and applied eminent domain and uniform relocation assistance laws.

Project Manager, Riverside County Transportation Commission (RCTC), State Route 74 Curve, Riverside, CA: As Project Manager, Vince was responsible for overseeing partial take acquisitions of 12 parcels. He provided owner purchase negotiations, Purchase and Sale Agreement review and revisions, coordinated with appraisers, escrow, and county tax assessor professionals and drafted and presented offer packages.

EDUCATION

*Bachelor of Arts, Public Administration,
Concentration in Finance, San Diego
State University, San Diego, CA*

CERTIFICATIONS

*Senior Right of Way Agent (SR/WA),
International Right of Way Association
(IRWA)*

*Right of Way Relocation Assistance
Certification (R/W-RAC), International
Right of Way Association (IRWA)*

*CA Real Estate License, No. 01481659,
Expires 2/24/2025*

Mike Flanagan,
SR/WA, R/W-NAC
Advisor



Mike has over **30 years** of experience in the right of way industry within Southern California. His extensive experience in right of way includes working on projects for the Coachella and Elsinore Valley Water Districts, Cities of Moreno Valley and San Diego, County of San Diego, San Diego County Water Authority, and SDG&E.

Project Experience:

Project Manager, Coachella Valley Water District, Avenue 66 Transmission Main, Phase 2 Project, Mecca, CA:

As a Project Manager for the Clark Land team, Mike oversaw our agents as they negotiated and acquired signed consent

forms from over 20 Allottees and a Resolution authorizing the project from the Torres-Martinez Tribe. The Consent forms, along with an application for right of way with a checklist of project documents, were submitted to the Bureau of Indian Affairs (BIA). The BIA approved the right of way allowing the construction of a 30" Transmission Main to provide safe, affordable, and accessible drinking water to this rural, disadvantaged community, while also providing water supply redundancy to the community of Mecca.

Project Manager, Elsinore Valley Municipal Water District, On-Call Commercial Real Estate Services, San Diego County, CA:

As Project Manager, Mike oversees property appraisal, letters of offer, purchase and sale documents, escrow coordination, condemnation support, and recordings of property transfers. Mike develops, or assists, in the development of easement language and acquires easements as necessary. He performs document research, property research, interpretation of property rights and title information, and acquires Rights of Entry.

EDUCATION

*Master's Degree, Public Administration,
San Diego State University*

*Bachelor's Degree, Economics, San Diego
State University*

CERTIFICATIONS

*Senior Right of Way Agent (SR/WA), IRWA
Right of Way Negotiation and Acquisition
(R/W-NAC), IRWA*

*CA Real Estate License, No. 0856742,
Expires: 1/16/2024*

Sue Cope, SR/WA
Principal in Charge

Sue has over **30 years** of experience working with Municipal, State, and Federal project teams in support of public works and utility projects. She is in charge of supplying Clark Land's project managers with the vital resources needed for on-time submittal of client deliverables. Sue works closely with the Contract Administration Manager and Operations Manager to ensure that contract obligations are met as well as any reporting requirements, including reporting of prevailing wages.

Project Experience:

Principal in Charge, Elsinore Valley Municipal Water District (EVMWD), On-Call Commercial Real Estate Services, San Diego County, CA: As Principal-in-Charge, Sue oversaw property appraisal, letters of offer, purchase and sale documents, right-of-way coordination, condemnation support and recordings of property transfers.

Principal in Charge, Rainbow Municipal Water District (RMWD), As-Needed General Real Property Services, San Diego County, CA: Sue oversaw this project to provide as-needed right-of-way, land management and encroachment resolution services to the water district. The projects included coordination with Metropolitan Water District for negotiation of property rights/permitting and boundary surveys for determining easement rights. Other services included encroachment resolution, partial acquisitions for subterranean easements and coordination with local and state agencies for utility relocation.

EDUCATION

Associate of Liberal Arts Degree, Fresno City College

Upper Graduate Studies, California State University, Fresno

CERTIFICATIONS

Senior Right of Way Agent (SR/WA), IRWA

CA Real Estate License No. 2005469, Expires: 11/08/2025

Donna Fritts
Right of Way
Supervisor

Donna Fritts utilizes her **25 years** of land acquisition and project management experience to implement company and client policies and procedures under which land is acquired, retained, managed, and sold throughout the client's system.

Her duties require discretion and independent judgment that include the acquisition of lands, easements, leases, licenses, contracts, permits, and other interests necessary for the conduct of the client's business. She prepares land documents such as deeds, easements, lease agreements, licenses, and contracts to protect the client's interests, sustains competent relations with

landowners and government officials and coordinates with other departments regarding land and right of way activities and maintains continual communication, cooperation, and liaison between outside companies, public agencies, property owners, construction forces, and other client departments and subsidiaries.

Project Experience:

Senior Right of Way Agent, Southern California Gas Company (SoCalGas)/Semptra Utilities, North-South Project, Los Angeles, CA: Donna served as Senior Land Advisor for the North-South Project. She worked on preliminary environmental studies on individual parcels located on and near proposed pipeline, sent out notification letters to landowners, compiled a spreadsheet of landowners and their contact information as well as important information for future acquisition. Donna created a strategic line list of all parcels, river crossings, road crossings, railroad crossings, canal crossings, and foreign line crossings associated with the proposed pipeline corridor.

Acquisition Coordinator, San Diego Gas & Electric (SDG&E) Fire Risk Mitigation (FiRM) Program, Electric System Hardening (ESH) Program, San Diego County, CA: Donna is currently the acquisition coordinator on this electric project involving the wood-to-steel pole conversions in San Diego County. She works closely with the design team to help solve landowner issues and pushbacks and maintains a positive relationship with property owners who are also SDG&E's customers. Donna also oversees the acquisition and disposition of public right of way and all types of property rights including right of way agents, title and documents team, tracks right of way negotiations and easement acquisitions, sets up procedures in accordance with Client specifications, and monitors project schedules to ensure all deadlines are met.

EDUCATION

Bachelor of Arts, Business Management-Accounting, University of Washington

CERTIFICATIONS

Environmental Certification, Federal Energy Regulatory Commission

Business Ethics Certification, Federal Energy Regulatory Commission

CA Real Estate License, No. 02072410, Expires: 10/31/23

Gloria Roma, RWA
Right of Way Agent

Gloria has over **29 years** of experience in the real property industry and works on public municipal projects as well as private utility infrastructure projects including transmission and distribution facilities. Gloria has negotiated rights of entries, drafted land services memoranda, performed acquisition peer review, and has assisted with drafting easement exhibits and acquisition maps. Gloria has significant experience working with the Native American tribes and the Bureau of Indian Affairs.

EDUCATION

*Associates Degree, Mesa College, San Diego, CA
Procurement Project Management, University of California San Diego Extension*

CERTIFICATIONS

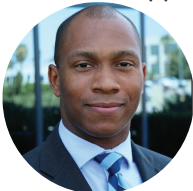
*Right of Way Agent (RWA), IRWA
CA Real Estate License, No., 01243709, Expires: 9/3/2024*

Project Experience:**Right of Way Agent, Coachella Valley Water District (CVWD), Avenue 66 Transmission Main, Phase 2 Project, Mecca, CA:**

Working alongside the Clark Land team and CVWD, Gloria expertly fulfilled her role as a Right of Way Agent. Her focus was to obtain property access through Native American tribal lands for the water pipeline project. The objective of this project was to connect the Manuela Garcia Small Water System to the CVWD system, providing safe, affordable, and accessible drinking water to the rural and disadvantaged community while also ensuring water supply redundancy for Mecca. Gloria's responsibilities included thorough title research, offering right of way support, and coordinating with the Bureau of Indian Affairs for potential permits and easement acquisitions.

Right of Way Agent, City of Encinitas & San Dieguito Water District, Olivenhain Trunk Sewer Access Easements, Encinitas, CA:

In this undertaking, Gloria contributed her expertise in right of way services, specifically focusing on the Olivenhain Trunk Sewer Access Easements project. Her responsibilities encompassed title research, drafting Letters of Intent, and negotiating easement acquisitions with Olivenhain property owners. The project involved acquiring access rights across various property types, including commercial, special-use, and residential properties, to facilitate the City's repair and maintenance of the Olivenhain Trunk Sewer. Approximately 29 access easements, both temporary and permanent, were required, with all acquisitions complying with Just Compensation and Eminent Domain laws.

Reggie Conedy
Right of Way
Assistant/Support

Reggie has over **6 years** of real estate experience and brings a variety of skills to the Clark Land team. He is proficient at assessing client needs, effectively communicating, and coordinating with multiple teams, and at anticipating obstacles and planning contingencies. Reggie has expert task management abilities, is committed to effectively tracking effort to optimize project progress.

EDUCATION

*Bachelor of Business Administration, Real Estate, University of San Diego
Associate of Arts, Liberal Studies, Chaffey College*

Project Experience:

Jr. Right of Way Agent, San Diego Gas & Electric (SDG&E), Strategic Underground (SUG) Program, San Diego County, CA: The Strategic Undergrounding Program (SUG) provides heightened wildfire resiliency and electric reliability by undergrounding distribution lines

near key community facilities. Reggie has been providing support on this project as a Jr. Right of Way Agent.

Sr. Mortgage Loan Originator and Process Lead, Finance of America Reverse: As a Sr. Mortgage Loan Originator Reggie communicated effectively with clients, real estate agents, appraisers, and attorneys to gather the necessary documentation needed to ensure a smooth property transaction. He was responsible for conducting thorough research on market trends, interest rates, and loan products to provide accurate information to clients. Finally, he prepared and presented comprehensive loan proposals to clients, clearly explaining terms and conditions.

Mia Thayer, RWA
Title Supervisor

Mia has **7 years** of experience and competencies in conducting land rights research including reading and understanding legal descriptions, plat maps, and other necessary documents for determining accurate property rights. Mia is both very detail oriented and able to see the "big picture" to manage her tasks, as well as her employees' tasks, to meet multiple client deadlines and strict quality requirements. Additionally, Mia has several years of responsible accountability for the Research Department at Clark Land, and she has over 20 years of clerical experience providing customer support to clients.

EDUCATION

*Concorde Career Institute, Medical Insurance Billing
Grossmont College, General Studies*

CERTIFICATIONS

Right of Way Agent (RWA), IRWA

Project Experience:

Sr. Title Agent/Task Lead, San Diego Gas & Electric (SDG&E) Fire Risk Mitigation (FiRM) Program, Electric System Hardening (ESH) Program, San Diego County, CA: Mia has managed the timely deliverables and quality control of research documents, by her team, for the FiRM and ESH projects. These projects involve SDG&E's analyses in determining high fire risk electric wood poles for conversion to steel poles throughout San Diego and Imperial Counties. Mia researched hundreds of existing right of way easements for these programs/projects. The research included providing project teams, and SDG&E staff, a copy of their easement, associated sketch, assessor parcel map, and subdivision/parcel map. If there was no right of way easement to be found, verification that the pole facility is either in franchise or on a highway was also required. Mia also interacted with all levels of staff from executives to field staff as well as tracked and reported weekly updates on project deliverables.

Sr. Title Agent/Task Lead, San Diego Gas & Electric (SDG&E) Strategic Underground Program, San Diego County, CA: Mia researched hundreds of existing right of way easements for these programs/projects. The research included providing project teams, and SDG&E staff, a copy of their easement, associated sketch, assessor parcel map, and subdivision/parcel map. If there was no right of way easement to be found, verification that the pole facility is either in franchise or on a highway was also required. Mia also interacted with all levels of staff from executives to field staff as well as tracked and reported weekly updates on project deliverables.

**Sandra Robinson,
RWP**

Title Research/Policies/
Clearance Lead



Sandra has over **16 years** of experience in the Title Insurance and Escrow Business providing clients with Preliminary Title Reports, HOA documents, amendments, supplements, chain of title to property, recording copies of Grant Deeds, Trust Deeds, preparing Final HUD Settlement Statements and Title Policies. Sandra has 7 years of experience dedicated specifically to easement research in the right of way field.

Project Experience:

Senior Title Agent, San Diego Gas & Electric (SDG&E) Fire Risk Mitigation (FiRM) Program, Electric System Hardening (ESH) Program, San Diego County, CA: This project requires the extensive and thorough research of each pole for existing Right of Way easements. Sandra is required to provide SDG&E with a copy of an easement, associated sketch, APN map,

Subdivision and Parcel map for each assigned facility. If no Right of Way easement was found, Sandra is required to verify that the pole facility is either in Franchise or on a State Highway.

Sr. Title Agent, San Diego Gas & Electric (SDG&E), Balboa Park and Campo Indian Reservation Special Projects, San Diego County, CA: This project requires extensive and thorough research of each pole for existing Right of Way easements. Sandra is required to provide SDG&E with a copy of an easement, associated sketch, APN map, Subdivision and Parcel map for each assigned facility. If no Right of Way easement was found, Sandra is required to verify that the pole facility is either in Franchise or on a State Highway.

EDUCATION

Associates Degree

CERTIFICATIONS

Right of Way Professional (RWP), IRWA

Relevant Experience of Subconsultants

We recognize that collaboration is key to delivering unparalleled value to our clients. By incorporating subconsultants into our team, we tap into a wealth of specialized expertise that enriches the scope of our services. These strategic partnerships allow us to offer diverse perspectives and innovative solutions. Not only do these collaborations allow us to effectively scale our resources to meet project demands, but they also enhance our ability to offer a broader range of services and solutions.

By harnessing the skills of our subconsultants, we can provide tailored solutions, guaranteeing that every project receives the highest level of attention and expertise. As we join forces with these industry experts, we envision a future where our clients benefit not only from our proven track record but also from the amplified capabilities and perspectives that this strategic collaboration affords.

**OUR APPRAISAL TEAM MEMBERS HAVE AN
AVERAGE OF**

25 YEARS OF EXPERIENCE

**COVERING A VARIETY OF COMPLEX
VALUATION ASSIGNMENTS AND THEY'VE
PROVIDED ON-CALL APPRAISAL SERVICES
AND EXPERT TESTIMONY TO MANY
AGENCIES THROUGHOUT SOUTHERN
CALIFORNIA.**

Our appraisal team specializes in right of way valuation. They have completed high-profile projects (road widenings, freeway expansions, light & heavy rail projects); utility infrastructure expansion and maintenance projects (utility easements – above and below ground); and temporary easements (temporary construction and access easements).

Senior Appraisers at both Hendrickson Appraisal Company and Santolucito-Dore Group are designated MAI's and any serve in various capacities on boards for the IRWA and the Appraisal Institute.



Our **Appraisal** subconsultant, Hendrickson, was incorporated in 1986 to provide real property appraisal services to municipalities and other governmental agencies. They provide on-call appraisal services to several municipalities

throughout Southern California. Their primary experience centers on valuation of multiple parcels to be acquired by public agencies and utility companies as part of large linear infrastructure projects, in compliance with eminent domain law.

Representative projects completed include valuation for subterranean and aerial utility easements (sewer, water, and dry utilities); temporary access easements for pipeline maintenance projects; transportation infrastructure projects (road, freeway, light and heavy-rail expansions and widenings); flowage easements; restricted-use and conservation easements; and, general access and slope easements.



Our **Review Appraisal** subconsultant, Santolucito-Dore Group, Inc. (SD Group), is a certified DBE, SB, SBE, & WBE that provides exceptional solutions for real estate and right of way projects

that create long-term partnerships for the public and private sectors. They are highly experienced in real estate valuation and consultation, with specialization in eminent domain projects for government agencies. Their experience includes the Eastern Municipal Water District, Riverside County, and various projects for the City of Riverside. They have also prepared appraisals for the City of Menifee, Riverside County Flood Control District, and San Bernardino County Transportation Authority.

Section 3 | Understanding the Project and Approach to Performing the Required Services

Clark Land's understanding of the project and on-call services includes knowing that to be successful, the selected firm must not only have the education, certifications, and licenses, as well as the relevant professional experience, but also be familiar with the critical issues of concern to CVWD. Moreover, having positive working relationships with local regulatory and stakeholder agencies will also determine the level of success of CVWD projects.

Perhaps, the most important element of successfully completing right-of-way and relocation projects is the trust that the project team develops with property owners while professionally representing the client since many of the property owners are also CVWD's customers.

Since several of the Clark Land team members have been working on the CVWD Avenue 66 Transmission project over the past couple of years, our team members are sensitive to the needs and critical issues that CVWD faces when trying to acquire property and work with property owners. CVWD has benefited from Clark Land's team members' success working with local agencies who are affected by construction of infrastructure projects.

CVWD also benefits from the Clark Land's team experience, earned credentials, and renowned reputation for integrity in working with both property owners and clients.

CVWD's North Cathedral Regional Stormwater Project will be subject to Clark Land's proven project and management approaches that demonstrate responsiveness, proactive communication, technical abilities, as well as schedule and budget efficiencies. The permanent access easements that are to be obtained are located on parcels with multiple existing easements and it is anticipated that negotiations may need to occur with the various entities, in the event the proposed access easement encroaches on their existing easement. Agreements may need to be prepared and negotiated for the shared use of the easement.

The following text provides our approach to right of way projects.

Project Planning

The Clark Land team members assigned to a CVWD project are available to participate in the planning phase by conducting a kickoff meeting, attending the team meetings and providing input, as necessary. The information Clark Land can provide during the project planning stage includes, but not limited to, inspection of properties or proposed parcel(s) requirements, information gathering, research and investigation of legal ownership or any potential problems that could impact the project schedule. As well as Rights of Entry (ROEs) for utility locations, soil sampling or other environmental concerns can be obtained from owners as required by the project.

Preliminary Title Reports

Clark Land will review preliminary title reports (PTRs), which will be provided by CVWD and will include a list of all encumbrances recorded against the property. A map showing the location of each plottable encumbrance will also be supplied along with the PTR.

Each PTR will be inspected for ownership status, recorded liens, encumbrances or other issues that could present problems when acquiring title or cause delays to the project. If needed, Bureau of Land Management (BLM) records will be searched, and BLM staff interviewed to determine the existence of any recorded or unrecorded interests, when applicable.

A Right of Way Impact Report listing all parcels proposed for a project will be prepared. The report will identify each parcel number, owner/allottee name, any recorded title issue or concern along with a proposed plan for resolving the issue. If applicable, the report will also include an estimated cost for clearing each title matter. The report, with appropriate exhibits, will be presented to the project team for review and comment, if requested.

Plats and Legal Descriptions

The plats and legal descriptions are to be prepared by others and provided to CVWD and Clark Land for review. Once the necessary approvals have been obtained, the approved Plats & Legals will be delivered to the project appraiser.

Appraisal

Clark Land has worked with many appraisal firms over the years and are proposing to use our preferred partner, Hendrickson Appraisal Company (Hendrickson), for this contract. Hendrickson will develop a appraisal scope and submit to CVWD for approval prior to proceeding.

By selecting Clark Land you're choosing a partner who not only understands the importance of budget and schedule management but also excels in translating these principles into tangible, successful outcomes.

After the appraiser reviews the project plans, maps, PTRs, encumbrance maps or other relevant documents and property inspections, a search of the appropriate market for relevant land use and zoning considerations will be completed.

The comparable properties identified will be researched and analyzed to aid in developing an opinion of value relevant to the land's highest and best use.

The appraiser will be asked to produce Appraisal Summary Statements for each owner along with two hard copies and one electronic copy of each appraisal for the project files and CVWD.

Clark Land will engage the services of a Review Appraiser to verify the Hendrickson appraisals were prepared in accordance with Uniform Standards of Professional Appraisal Practice (USPAP), if desired by CVWD.

Each owner impacted by the project will be mailed, via certified mail or FedEx, a Notification of Decision to Appraise ("NDA") using the CVWD template form. The letters will include an offer for each owner to meet with the appraiser during his inspection of the property. Hendrickson will then complete fair market value appraisals to determine just compensation for the acquisition requirements.

The Acquisition Process

Clark Land will review and reconfirm ownerships, as well as previously determined title issues. PTRs or other available documents will be updated as necessary. The acquisition team members will inspect the project area and each property impacted by the proposed acquisitions. The approved appraisals will serve as the basis for development of the first written offers (FWO). Clark Land will prepare the FWO and easement documents using the CVWD supplied forms, as directed, for the acquisitions.

Document Preparation

Clark Land's acquisition team will review supporting document information including title reports, legal and plats, real property appraisals, and other pertinent information. A project real property parcel file will be established to incorporate all relevant documentation to include, but not limited to, the parcel's diary, title report, appraisal summary, and offer package for the required property interest.

The offer package will be submitted to CVWD for review and approval. The offer package will include the following items:

- Offer Letter stipulating Just Compensation to Owner
- Appraisal Summary Statement
- Map of Project Area
- Owner's Receipt Acknowledgment
- Acquisition/Easement Documents with proper signature blocks (as directed by the title company) and corresponding legal and plats
- CVWD Brochure outlining Owner's Rights Under the Uniform Act

Negotiations

The following steps summarize Clark Land's efforts when negotiating to acquire fee title and easement rights:

- Verbal communication with the property Owner to discuss delivery of the First Written Offer (FWO).
- Mail offer to Owner via certified mail with return receipt requested or FedEx (unless an in-person meeting is requested).

- If the Property Owner does not accept the offer, obtain any information or appraisal data Owner may have to support their opinion of value. Submit Owner information to CVWD in writing along with Clark Land's recommendation.
- Follow-up with the Owner for the remainder of scheduled negotiations period.
- Every attempt will be made within the 45-day negotiation period for a maximum of three contacts with property Owner. If more contact is needed with the property owner, Clark Land can provide more for an additional fee.

A project tracking report, listing each parcel number, owner name, appraised value, and current status will be compiled and shared with the project team. To accomplish these tasks, the Clark Land acquisition team will commit to attending weekly project status meetings with CVWD staff as budgeted.

In the event Clark Land is unable to reach agreement with the property Owners, appropriate impasse letters will be prepared and sent at the direction of CVWD, and with the review and concurrence of legal counsel. Clark Land can provide litigation support to the CVWD throughout the condemnation process, if requested.

Escrow and Title

Clark Land will open an escrow account with Commonwealth Title, or a local escrow company if directed by CVWD. Clark Land will request updates of all PTRs to ensure these documents are dated within 30-days of the signing of acquisition documents.

Clark Land will reconfirm with Commonwealth Title that CVWD requires ALTA title policies and work with the title officer to prepare proforma title reports along with a written abstract listing encumbrances that will require removal prior to close of escrow.

Clark Land will take an active role during escrow to secure any lender or lessee consents, reconveyance or subordination releases, resolve code violations, court judgements or other title issues. Clark Land will review settlement statements and other escrow documents for accuracy.

Escrow fees and title insurance costs are billed directly to the CVWD with no mark-up from Clark Land.

Project Completion

Once all parcels have been acquired for the project, Clark Land will deliver hard copies of all closed files, including copies of correspondence with Owners/Allottees, appraisal summary, project notes and recorded documents, to CVWD.

Project Management of Acquisition Tasks

To successfully fulfill all of Clark Land's project needs, our Operations Dept. meets on a weekly basis to review workloads, redistribute workloads as needed, and review the budgets for each task order assigned by our clients. Resources are evaluated to determine if projects need more staffing to achieve project scheduling goals or less as projects wind down and requires less resources for budgeting purposes.

We rely on technology to maximize efficiency in delivering quality service. Our online database tool helps us track all project involvements as we strive to reach a variety of milestones along the project lifecycle.

Systematic Status Reporting

Clark Land will work with CVWD to manage the project scope. We will collaborate directly with CVWD's project team to address any issues as early as possible to mitigate any schedule interference or timeline delay. We utilize Bill Quick's CORE as our time reporting and budgeting software. Time entries by staff are carried out daily and reviewed for approval on a weekly basis by our project managers.

Clark Land can submit accountable written status reports at CVWD's request, whether weekly, biweekly, or monthly. Status reporting includes milestones pursued and achieved, parcel diary entries for each parcel acquisition, areas of concern, as well as project plan updates. The status reports deliver an "at-a-glance" look at information immediately conveying project progress, highlighting key points with questions for the CVWD's project manager.

Section 4 | Fee Proposal and Other Cost Considerations

Clark Land Resources, Inc. Cost Estimate
Prepared for Coachella Valley Water District

October 16, 2023

Staff Classifications and Rates	Role	Per Hour Rate	Role	Per Hour Rate	Role	Per Hour Rate	Role	Per Hour Rate	Role	Per Hour Rate	Role	Per Hour Rate	Role	Per Hour Rate	Role	Per Hour Rate	Total Labor Cost	Total Cost
Tasks (Gray/White = Clark Land Responsibility; Peach = CVWD's Responsibility)	Principal in Charge & QA/QC Broker	\$210.00	Project Manager	\$ 200.00	Senior ROW Agent & Task Leaders	\$ 185.00	ROW Agent	\$ 175.00	Contract Admin. Specialists	\$ 135.00	Sr. Title Supervisor	\$ 135.00	Title Researcher	\$ 125.00	Clerical	\$ 105.00		
Estimate Based on 5 Fee Title Acquisitions and 4 Permanent Access Easements																		
Right-of-Way Services																		
1 Planning																		
1a Kick-off Meeting	1	\$210.00	4	\$800.00	2	\$370.00							1	\$125.00			\$1,505.00	\$1,505.00
1b Work Plan and Schedule	2	\$420.00	8	\$1,600.00					2	\$270.00			1	\$125.00			\$2,415.00	\$2,415.00
2 Title Services																		
2a Review 9 Preliminary Title Reports (PTRs)													28	\$3,500.00			\$3,500.00	\$3,500.00
3 Appraisal/Valuation																		
3a Send "Notice of Decision to Appraise"			2	\$400.00	4	\$740.00											\$1,140.00	\$1,140.00
3b Site Visit			4	\$800.00	4	\$740.00	4	\$700.00									\$2,240.00	\$2,240.00
4 Acquisitions																		
4a Prepare Hard Copy and Electronic File Offer Packages			4	\$800.00	8	\$1,480.00	18	\$3,150.00							12	\$1,260.00	\$6,690.00	\$6,690.00
4b Offer Package Reviewed / Approved by CVWD																		
4c Contact Property Owner for "First Written Offer" Appointment			2	\$400.00			18	\$3,150.00									\$3,550.00	\$3,550.00
4d Prepare Right of Way Cost Estimate			2	\$400.00	4	\$740.00	8	\$1,400.00									\$2,540.00	\$2,540.00
4e Negotiations-Finalize Offers (Minimum 3 contacts per property)	4	\$840.00	20	\$4,000.00	24	\$4,440.00	48	\$8,400.00									\$17,680.00	\$17,680.00
4f Administrative Settlement (if necessary)	2	\$420.00	12	\$2,400.00	12	\$2,220.00											\$5,040.00	\$5,040.00
5 Conveyance & Closing																		
5a Deliver Executed Agreements / Open Closing Services			4	\$800.00	8	\$1,480.00	18	\$3,150.00									\$5,430.00	\$5,430.00
5b Coordinate Conveyance/Closing Services			2	\$400.00	12	\$2,220.00	18	\$3,150.00					40	\$5,000.00			\$10,770.00	\$10,770.00
6 Optional - Title Clearance																		
6a Develop List of Clouded Title for CVWD			4	\$800.00							4	\$540.00					\$1,340.00	\$1,340.00
6b Develop Title Clearance Plan			4	\$800.00									18	\$2,250.00			\$3,050.00	\$3,050.00
6c Review Title Clearance Plan (CVWD)																		
6d Execute Title Clearance Plan											8	\$1,080.00	32	\$4,000.00			\$5,080.00	\$5,080.00
7 Certification of Right of Way																		
7a Prepare Right of Way Certification Docs	2	\$420.00	4	\$800.00	4	\$740.00											\$1,960.00	\$1,960.00
7b Obtain Right of Way Certification					8	\$1,480.00							18	\$2,250.00			\$3,730.00	\$3,730.00
8 Project Management																		
8a Provide Ongoing Status Reports (Weekly)			36	\$7,200.00	36	\$6,660.00									18	\$1,890.00	\$15,750.00	\$15,750.00
8b Monitor Budget and Actual Costs (Monthly)			12	\$2,400.00	8	\$1,480.00			18	\$2,430.00							\$6,310.00	\$6,310.00
8c Attend Meetings for Project Status Review (Bi-Weekly)			16	\$3,200.00	32	\$5,920.00											\$9,120.00	\$9,120.00
Subtotal Labor	11	\$ 2,310.00	140	\$28,000.00	166	\$30,710.00	132	\$23,100.00	20	\$ 2,700.00	12	\$ 1,620.00	138	\$ 17,250.00	30	\$ 3,150.00	\$108,840.00	\$108,840.00
Other Direct Costs (ODC's)	Units	ODC Cost	Units	Cost	Units	Cost	Units	Cost										
Approximate Mileage (Grantors and Lessees, Meetings, CVWD, and Appraisers)	7900	\$ 5,170.00															\$5,170.00	\$5,170.00
Appraisals: 4 for Partial Acquisition and 5 for Full Acquisitions	9	\$62,100.00															\$62,100.00	\$62,100.00
Review Appraisals	9	\$14,400.00															\$14,400.00	\$14,400.00
Per Diem			10	\$ 1,680.00	10	\$ 1,680.00	15	\$ 2,520.00									\$5,880.00	\$5,880.00
Approximate Reproduction (estimated)	1000	\$ 150.00															\$ 150.00	\$150.00
Approximate Certified & Street Mailings		\$ 500.00															\$500.00	\$500.00
Contingencies (for missing property owners, out of state travel (if necessary))		\$10,000.00															\$ 10,000.00	\$ 10,000.00
GRAND TOTALS		\$94,630.00	\$150.00	\$29,680.00	\$176.00	\$32,390.00	\$147.00	\$25,620.00	\$20.00	\$2,700.00	\$12.00	\$1,620.00	\$138.00	\$17,250.00	\$30.00	\$3,150.00	\$207,040.00	\$207,040.00

Tasks can be added or deleted as requested by the Coachella Valley Water District

Clark Land Resources, Inc. Schedule
Prepared for Coachella Valley Water District

Year	2024								2025
	Month 1	Month 2	Month 3	Month 4	Month 5	Month 6	Month 7	Month 8	Month 9
Estimate Based on 5 Fee Title Acquisitions and 4 Permanent Access Easements									
Right-of-Way Services									
1 Planning									
1a Kick-off Meeting	Wk 1								
1b Work Plan and Schedule	Wk 1								
2 Title Services									
2a Review 9 Preliminary Title Reports (PTR's)	Wks 2-3								
3 Appraisal/Valuation									
3a Send "Notice of Decision to Appraise"	Wk 4								
3b Site Visit		Wks 5-6							
3c Prepare Property Appraisals			Wks 7-12						
4 Acquisitions									
4a Prepare Hard Copy, Electronic Files and Offer Packages			Wks 8-14						
4b Offer Package Reviewed / Approved by CVWD				Wks 14-16					
4c Prepare ROW Cost Estimates					Wk 18				
4d Contact Property Owner for "First Written Offer" Appointment					Wks 17-20				
4e Negotiations-Finalize Offers (Maximum 3 property owner contacts)					Wks 17-24				
4g Administrative Settlement or Summit Meeting (if necessary)						Wk 29			
5 Conveyance & Closing									
5a Deliver Executed Agreements / Open Closing Services							Wk 30		
5b Coordinate Conveyance/Closing Services							Wk 30-34		
6 Optional - Title Clearance /ROW Certificataion									
6a Develop List of Clouded Title for CVWD								Wk 32	
6b Develop Title Clearance Plan								Wk 32	
6c Review Title Clearance Plan (CVWD)								Wk 32	
6d Execute Title Clearance Plan								Wk 32-36	
7 Right of Way Certification									
7a Prepare Right of Way Certification Docs									Wk 36
7b Obtain Right of Way Certification									Wk 36
8 Project Management									
8a Provide Ongoing Status Reports (Weekly)									
8b Monitor Budget and Actual Costs (Monthly)									
8c Conference Calls for Project Status Review (Bi-Weekly)									



WE THANK THE CVWD FOR THIS OPPORTUNITY TO SUBMIT OUR QUALIFICATIONS

**Please contact our Principal in Charge with any questions you
may have about this proposal:**

Sue Cope, SR/WA

Principal in Charge

(760) 468-3464

sue.cope@clarklandresources.com

