

Request for Proposal (RFP) for Land Conservation Transaction Services

Issued By:

Utah Lake Authority

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Provo, UT 84601

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Date Issued: 04/10/25

Proposal Due Date: 04/24/25 @ 3PM

1. Introduction

Utah Lake Authority seeks proposals from qualified firms to facilitate land conservation transactions, including conservation easements, to preserve wetlands and natural habitats, and ensure public access for recreation. The selected firm will provide technical, legal, and strategic guidance to assist in negotiating and finalizing conservation agreements with private landowners.

2. Scope of Work

The selected firm will be responsible for the following services:

- **Landowner Engagement & Negotiation**
 - Identify and engage interested landowners.
 - Provide technical assistance and guidance on conservation easements.
 - Facilitate discussions between landowners and the agency.
- **Transaction Structuring & Documentation**
 - Draft and review conservation easement agreements.

- Conduct due diligence, including title research and environmental assessments.
- Provide financial analysis of potential tax benefits for landowners.
- **Legal and Compliance Support**
 - Ensure all transactions comply with state and federal conservation laws.
 - Assist with IRS reporting requirements for conservation donations.
 - Work with legal counsel to finalize contracts.
- **Monitoring and Stewardship Planning**
 - Develop long-term monitoring and enforcement plans for easements.
 - Support the agency in ongoing land stewardship responsibilities.

3. Proposal Requirements

Interested firms must submit a proposal that includes the following:

1. **Firm Background and Experience**
 - a. Summary of the firm's expertise in land conservation transactions.
 - b. Examples of past projects with government agencies or land trusts.
 - c. Resumes of key personnel assigned to the project.
2. **Proposed Approach**
 - a. Methodology for engaging landowners and structuring transactions.
 - b. Approach to ensuring compliance with legal and tax requirements.
 - c. Proposed timeline for typical easement transactions.
3. **Budget and Fee Structure***
 - a. Breakdown of costs for each phase of work.
 - b. Any additional fees or anticipated expenses.
 - c. ***Any information on costs/budget/fees should be included as a SEPARATE document. Failure to do so will result in disqualification of the review process.**
4. **Other Requirements**
 - a. Proposal length should not exceed 10 pages (costs are not included in this page limit, nor is a cover page for the proposal)
 - b. Contact information for three previous clients who received similar services.

4. Evaluation Criteria

Proposals will be evaluated based on the following criteria:

- **Experience and Qualifications (30%)**

- **Proposed Methodology and Approach** (30%)
- **Cost Effectiveness** (20%)
- **References and Past Performance** (20%)

5. Submission Instructions

All proposals must be submitted electronically in PDF format to shelby@utahlake.gov by 3pm on 04/24/25. Late submissions will not be considered. Any questions regarding this RFP should be directed to Shelby Kozak, shelby@utahlake.gov by 2pm on 04/27/25.

6. Additional Information

Utah Lake Authority reserves the right to reject any or all proposals, negotiate terms, and request additional information from any applicant. The results of this procurement will be an annual contract, with an annual option to renew for 5 consecutive years.