



## APPROVAL REQUEST FOR A BEYOND 5 YEAR CONTRACT TERM

Date of Submission:	3/27/2024		
User Agency/Department(s):	Parks & Recreation	Budget Unit #:	0710

### SECTION I

#### ☐ REQUEST TO SOURCE A NEW CONTRACT BEYOND FIVE YEARS IN TERM

Complete this section only if sourcing a new contract that will exceed a five-year term and proceed to Section IV. If you are extending an existing contract, please continue to Section II.

Anticipated Contract Start Date:		Total Length of Term: (In months, excluding extension options)	
Anticipated Contract End Date:			
Comments:			
Budgeted Amount of Project:	\$		
Proposed Contractor Name:			
Description of Goods or Services:			

### SECTION II

#### ☒ REQUEST TO EXTEND EXISTING CONTRACT BEYOND FIVE YEARS IN TERM

Complete Sections II and III only if extending an existing contract beyond a five-year term.

Contract/PO Number:	N/A		
Contractor Name:	Hulberg & Associates, Inc., dba Valbridge Property Advisors		
Current Contract Start Date:	05/07/2019	Current Contract End Date:	05/06/2024
Total Current Value of Agreement:	\$ 1000000.00		
Description of Goods or Services:	Provide real estate appraisals and commercial economic analysis professional services.		

### SECTION III

#### PROPOSED CONTACT EXTENSION DETAILS

If extending an existing contract beyond a five-year term, please provide details on the proposed extension.

Recommended # of Months Extension:	8
Recommended End Date:	12/31/2024
Recommended Additional Contract Value:	\$ 0.00
Recommended Total Contract Value:	\$ 1000000.00



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### SECTION IV

#### PREAPPROVAL HISTORY

Please attach a copy of all previously signed preapproval forms for this contract (e.g., Justification for Exception to Competitive Procurement, Request for a Beyond 5 Year Contract Term, etc.) with your submission.

What is the acquisition method used to source this contract? RFP

Has an Approval Request for a Beyond 5 Year Contract Term been approved for this contract previously?



Yes



No

If yes, how many times has this contract been previously approved for a Beyond 5 Year Contract Term?

### SECTION V

Mark appropriate box for Contract's Signature Authority



Board of Supervisors



Delegated to Department Head or designee



Chief Procurement Officer/Director of Procurement or Designee

### SECTION VI

Pursuant to Board Policy 5.4.5.4, **EXCEPTIONS** to the maximum 5-year term limit for Professional Services are listed below. Select the appropriate exception(s).

- |                                  |  |
|----------------------------------|--|
| <input type="radio"/>            | (1) When the funding source for a contract provides that the contract term must exceed five years. Such funding sources may include the State or Federal government or an outside funding source (private or foundation grant).  |
| <input type="radio"/>            | (2) When the County "piggybacks" on another jurisdiction's contract that is more than five years or that is subsequently extended for more than the initial five-year term.  |
| <input type="radio"/>            | (3) When a specific law, code or regulation requires that a particular type of contract include certain contract terms(s) that exceed 5 years. Please provide a specific citation below.   |
| <input type="radio"/>            | (4) Contracts for goods, which includes equipment, that have a lifespan that exceeds five years and the benefits to the County of exceeding a five-year term outweigh the benefits of creating and executing a new contract after five years   |
| <input type="radio"/>            | (5) Contracts for technology software or hardware that have a lifespan exceeding five years and the benefits to the County of exceeding a five-year term outweigh the benefits of creating and executing a new contract after five years   |
| <input type="radio"/>            | (6) Proprietary maintenance contracts.   |
| <input type="radio"/>            | (7) Contracts for project-specific professional services where the length of the project is expected to exceed five years.   |
| <input type="radio"/>            | (8) Revenue contracts.   |
| <input type="radio"/>            | (9) Contracts with other governmental entities.  |
| <input checked="" type="radio"/> | (10) When an Agency/Department is otherwise able to justify that it is in the County's best interest to exceed the maximum 5-year term requirement. For example, an Agency/Department is able to demonstrate that the financial and/or programmatic impact on the County would be significant if the contract term does not exceed the maximum 5-year term requirement [Specific rationale must be provided in Section VIII, below]. |



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### SECTION VII

Provide a narrative explanation below:

#### A. BACKGROUND (Describe the good or services procured)

The multi-year PSA provides a mechanism for contracting with Hulberg & Associates, Inc., dba Valbridge Property Advisors to work on a variety of projects for the Department during the term of the contract. The firm will provide appraisal services for the following Service Areas: Service Area 1- Appraisal of varied interests in real properties; Service Area 2 - Preparation of Commercial Economic Analysis (CEAs); Service Area 3 - Review and provision of advice to the Department regarding appraisal reports and CEAs, including those reports submitted by other entities.

Real Estate Appraisals and/or appraisal consultant services are needed for the Department to complete the purchase and sale of real property.

#### B. CONTRACT HISTORY, if applicable. (How was the contract awarded? What were the events that occurred prior to the end of the contract term?)

The Department issued the RFP on January 16, 2019, (RFP-PRK-FY19-0150), which was posted both on County's bid management website, [www.bidsync.com](http://www.bidsync.com), and on the Department's website, [www.parkhere.org](http://www.parkhere.org), to invite qualified consulting firms to submit a proposal for stated appraisal services. In addition, the Department sent an email invitation to twenty local appraisal firms that expressed an interest in receiving such solicitation.

On February 4, 2019, Addendum No. I was posted to respond to questions that were received in a timely manner by interested proposers to provide a response clarification.

The posting of the RFP in BidSync resulted in 39 potential consulting firms viewing the RFP, of which twelve downloaded it. The RFP closed on February 13, 2019. Four proposals were received on or before the due date of February 13, 2019, one proposal was received after the due date on February 14, 2019, and per rules of the RFP was automatically disqualified without consideration. The evaluation process proceeded thereafter. An Evaluation Committee (Committee) was formed for the evaluation and selection process comprising of representatives from the Department, Facility and Fleet Department, and one evaluator from outside the County. Proposals were evaluated using the evaluation criteria outlined in the RFP. Evaluations were conducted, and the Committee recommended Hulberg & Associates, Inc. dba Valbridge Property Advisors, Smith & Associates, and The Doré Group, Inc. for the real estate appraisal and economic analysis services. Based on the Committee's recommendation, the Department proceeded with the final negotiations.



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### C. REASONS FOR CONTRACT TERM EXTENSION (Provide an explanation to support your selection in Section VI, including any relevant market research)

The contract with Hulberg & Associates, Inc. dba Valbridge Property Advisors expires May 6, 2024.

Currently, the Department is working on a competitive selection process for Real Estate Appraisals and Commercial Economic Analysis Professional Services.

This amendment would extend the contract term for the PSA, allowing for continuity in services and ensure the Department has the vital documentation for critical projects.

### D. RECOMMENDATION TO CURE ISSUE(S) (If applicable)

## SECTION VIII:

### SOURCING PROJECT DETAILS

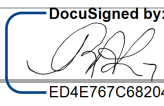
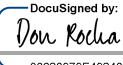
If your preapproval is requesting additional time to conduct a solicitation or source a successor contract, please outline your anticipated project schedule below. Include any relevant information on the sourcing project to date, such as the Master Acquisition List (MAL) ID number, draft of ICP preapproval request, or other references that may demonstrate progress on the sourcing project.

The anticipated project schedule to conduct the solicitation will commence April 2024. The award date will be the second half of 2024; with an estimated contract start date of 01/01/2025.



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### SECTION IX

Requesting Contracts Manager:	Print Name: Rossana Lezama
	Signature:  <small>DocuSigned by: ED4E767C68204F1...</small>
Requesting Agency/Department Director:	Print Name: Don Rocha
	Signature:  <small>DocuSigned by: 80620979E492402...</small>
Centralized Procurement Division Manager: <i>(If applicable)</i>	Print Name:
	Signature:

### SECTION X

#### DECISION AND REQUIRED STEPS FOLLOWING DECISION (To be completed by OCCM)

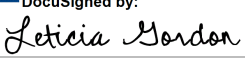
<input type="radio"/>	Attach to Service Agreement Checklist/Cover Sheet	<input type="radio"/>	Attach to Legislative File
<input type="radio"/>	Attach to PO/Contract File	<input checked="" type="radio"/>	Attach to Delegation of Authority Cover Sheet
<input checked="" type="radio"/>	Approved	Comments:	
<input type="radio"/>	Approved with Conditions	Comments:	
<input type="radio"/>	Returned for Possible Reconsideration	Comments:	
<input type="radio"/>	Denied	Comments:	

### SECTION XI

Office of Countywide Contracting Management Approval	Initials  <small>DS</small>
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### SECTION XII

#### Office of Countywide Contracting Management Signature

Signature	Date
 <small>DocuSigned by: FC91A7A3FE2849D...</small>	on behalf of Ky Le, Deputy County Executive 3/28/2024