

ATTACHMENT F – REVISION 1

SUBMISSION FORM FOR TECHNICAL PROPOSAL

Firm (Legal Name):	
Address:	
Address Line 2:	
City, State, Zip Code	
Contact:	
Title:	
Phone Number:	
Fax Number:	
Email Address:	
Federal Tax ID Number:	

In order for a proposal to be considered responsive and acceptable for evaluation by the AOC, the proposal must contain the following information and be submitted according to the following guidelines.

Proposal format must be as follows:

1. Number your responses exactly as numbered below and in the same sequential order.
2. Restate the AOC's question or required information.
3. Provide your response.

Responsive proposals should provide straightforward, concise information addressing the requirements. Expensive bindings and color displays, for example, are neither necessary, nor desired. Emphasis should be placed on providing responses and materials that conform to the AOC's instructions and are clear and complete responses.

A. TEAM AND SERVICE AREAS

1. Describe the team you propose to assemble to manage the AOC account, perform the appraisal work, and handle the daily order processing/tracking, invoicing and related contract administration.
2. Provide résumés describing the background and experience of the key staff you intend to assign for the performance of the work, describing each individual’s ability and experience in conducting the proposed activities.
3. For each of the fifty-eight (58) counties in the State, indicate if your firm is, or is not, able to provide the required services outlined in **Attachment A Scope of Services**. For each county, indicate if your firm is able to meet the AOC’s requirement for the use of a local appraiser and, if so, whether this would be accomplished directly or through the use of subcontractors. If use of subcontractors would be required, include further details about the use of subcontractors. If you have a currently-existing relationship with a subcontractor, please provide a resume or statement of qualifications for that subcontractor.

COUNTY BY COUNTY SERVICE LIST

County	Services Provided in Last 12 Mos? (YES/NO)	If services provided in last 12 mos., indicate if directly or through subcontractor	
		Direct	Subcontracted
(1) Alameda			
(2) Alpine			
(3) Amador			
(4) Butte			
(5) Calaveras			
(6) Colusa			
(7) Contra Costa			
(8) Del Norte			
(9) El Dorado			
(10) Fresno			
(11) Glenn			
(12) Humboldt			
(13) Imperial			
(14) Inyo			
(15) Kern			
(16) Kings			
(17) Lake			
(18) Lassen			
(19) Los Angeles			
(20) Madera			
(21) Marin			
(22) Mariposa			
(23) Mendocino			
(24) Merced			

Request For Real Estate Appraisal Services for Office of Real Estate and Facilities Management

(25) Modoc			
(26) Mono			
(27) Monterey			
(28) Napa			
(29) Nevada			
(30) Orange			
(31) Placer			
(32) Plumas			
(33) Riverside			
(34) Sacramento			
(35) San Benito			
(36) San Bernardino			
(37) San Diego			
(38) San Francisco			
(39) San Joaquin			
(40) San Luis Obispo			
(41) San Mateo			
(42) Santa Barbara			
(43) Santa Clara			
(44) Santa Cruz			
(45) Shasta			
(46) Sierra			
(47) Siskiyou			
(48) Solano			
(49) Sonoma			
(50) Stanislaus			
(51) Sutter			
(52) Tehama			
(53) Trinity			
(54) Tulare			
(55) Tuolumne			
(56) Ventura			
(57) Yolo			
(58) Yuba			

B. REQUIRED APPRAISAL SERVICES

The following questions relate back to **paragraph B. of Attachment A – Scope of Services.**

1. General Report Requirements

Indicate if your firm can provide each of the types of appraisal reports and services described below:

- a. Types of Properties
 - 1) Land
 - 2) Land + Improvements

- b. Types of Reports
 - 1) ~~Restricted Appraisal Report Use;~~
 - 2) ~~Appraisal Report Summary;~~
 - 3) ~~Self-Contained; and~~
 - 4) ~~Commission~~

- c. Approaches required:
 - 1) Cost Valuation
 - 2) Income Capitalization
 - 3) Sales Comparison
 - 4) Combination of above
 - 5) Alternative approach for Special Use properties
 - a) Use Value
 - b) Going Concern Value
 - d. Combination of above

- d. Types of Services
 - 1) New appraisal report.
 - 2) New appraisal report – AOC provides a recent appraisal report from another firm.
 - 3) Multiple new appraisal reports for properties in the same vicinity, being appraised concurrently, thereby affording Service Provider certain economies of scale.
 - 4) Update of a previous Service Provider appraisal report, to reflect current market conditions.
 - 5) Update of a previous Service Provider appraisal report to reflect expanded scope.
 - 6) Update of a previous Service Provider appraisal report to reflect reduced scope.
 - 7) Update of a previous Service Provider appraisal report to change approach used.
 - 8) New Commission appraisal report to determine brokerage market commission rates where a broker represents the AOC to acquire a specific type of property.

2. State of California Department of General Services Report Requirements

- a. DGS Appraisal Specifications: For ~~Appraisal Reports self-contained appraisal reports~~, indicate if your firm can meet all requirements contained in the DGS Specifications as described in **Attachments A-1**. If your firm is not able to meet the requirement(s), briefly explain why, noting any concerns or issues we should be aware of. If your firm is able to meet the requirements, provide further details, as appropriate, on how your firm plans to do so, including use of subcontractors.
- b. DGS Implied Dedication: For ~~Appraisal Reports self-contained appraisal reports~~, indicate if your firm can meet the DGS Implied Dedication requirement as described in **Attachment A-2**. If your firm is not able to meet the requirement(s), briefly explain why, noting any concerns or issues we should be aware of. If your firm is able to meet the requirement, provide further details, as appropriate, on how your firm plans to do so, including use of subcontractors.

3. Additional AOC Report Requirements

- a. Property Depiction: Indicate if your firm can meet this requirement as described in **Attachment A Scope of Services**.
- b. DGS Preference for Local Appraisers: Indicate if your firm can meet the requirement described in **Attachment A Scope of Services**. Describe in detail how this requirement can be met.
- c. Regional Area, neighborhood analyses (DGS Item 13): Indicate if your firm can meet the requirement as described in **Attachment A Scope of Services**. Describe in detail how this requirement can be met. If your firm cannot meet this requirement, please explain.
- d. Real estate data and analyses (DGS Item 14): Indicate if your firm can meet the requirement as described in **Attachment A Scope of Services**. Describe in detail how this requirement can be met. If your firm cannot meet this requirement, please explain.

C. CONTRACT ADMINISTRATION REQUIREMENTS

1. **Order/Price Quote Process**: Indicate if the process described in **Attachment A Scope of Services, paragraph C.1** is acceptable or not, and if not, provide an explanation. Be sure to review the Travel / Living Expenses (refer to **Attachment C, Exhibit C, Par. 2.E** for a description of allowed expenses).
2. **Delivery/Approval of reports by AOC**: Indicate if the process described in **Attachment A Scope of Services, paragraph C.2** is acceptable or not, and if not, please explain.
3. **Approval of ~~Self-Contained Appraisal Reports~~ by DGS**
 - a. Report rejected by DGS for non-conformance to requirements: Indicate if the process described in **Attachment A Scope of Services paragraph C.3.a** is acceptable and, if not, please explain.

- b. Report rejected by DGS for other reasons: Indicate if the process described in **Attachment A Scope of Services, paragraph C.3.b.** is acceptable, and, if not, please explain objections and provide suggestions for our consideration that might better address this scenario.

4. Administrative Services to be provided at no charge to AOC

- a. Status Reports: If the AOC requests periodic order status reports, describe what details would be included on the reports, how the reports would be produced, and indicate if reports will be provided at no charge. Indicate who on your firm's staff (name/title) would be creating, updating, and providing these to the AOC.
- b. Copies of Reports/Delivery: Indicate if up to four (4) (specific number to be provided by AOC on each request) hard-copy bound reports with original signatures, will be provided and sent to the AOC via courier service or USPS, at no charge.

D. TURNAROUND TIMES

1. For the scenarios described below, provide order completion turnaround times in **business days** for each type of service listed above in **paragraph B1**. Be sure to note any circumstances, exceptions, conditions, etc. that may affect turnaround times.

- a. Level 1 Report: Appraisal report with no/few challenges (e.g., a single parcel located in an area with recent comparable sales)
- b. Level 2 Report: A moderately complex appraisal report with some challenges (e.g., a "carve-out" parcel which is currently part of a larger parcel – but for which no legal description is currently available)
- c. Level 3 Report: A complex report with multiple challenges (e.g., a "carve-out" parcel which is currently part of a larger parcel – but for which no legal description is currently available, and which is located in an area with no recent comparable sales).

RESPONSES MUST BE NUMBERED EXACTLY AS NUMBERED IN paragraph B.1. above.

PLEASE NOTE: Our Standard Agreement (see RFP Attachment C, Exhibit C, paragraph 8) includes this provision: Failure to meet the agreed-upon delivery date may result in penalties that can include a reduction in payment of 25%, a cancellation of the order with no financial liability to the AOC and no financial obligation of the AOC to the service provider.

E. SERVICE PROVIDER INFORMATION

1. Provide a general overview of your firm.
2. Provide a list of any institutional or governmental agency clients with whom your firm has worked during the past 12 months and the scope and type of services provided. Indicate if your firm

has previous experience with the State of California Department of General Services Appraisal Review Unit and, if so, describe.

3. Provide the names, addresses, and telephone numbers of five (5) client references for whom your firm has provided similar services (i.e. services as described in RFP **Attachment A-Scope of Services**) at some point in the last 12 months. The AOC may contact these references as part of the evaluation process. By virtue of submitting these client names as references, your firm releases the AOC and the client references from any liability for any and all claims of harm caused to your firm's reputation by virtue of any discussion between the AOC and the client reference.

4. Provide a list of counties in the State of California in which your firm has provided similar services (i.e. services as described in RFP **Attachment A-Scope of Services**) over the last 12 months. Indicate for each county whether the services were provided by your company directly, or through an agent or subcontractor.

5. Describe experience your firm has with respect to appraising special purpose properties within the past 24 months where there may be no relevant market, such as schools, churches, cemeteries, parks, utilities and similar properties as described in the Law Revision Commission Comment to Code of Civil Procedure Section 1263.320.

F. QUALITY ASSURANCE

The AOC expects the initial appraisal report submitted to the AOC on the completion due date to be a complete, final, proofread, fact-checked report that meets all AOC/DGS requirements, with only minor revisions, if any, needed after review by the AOC. Please describe in detail your firm's quality assurance process.

G. RESPONSIVENESS

Describe in detail the process your firm will use to insure prompt and complete responses to AOC inquiries, questions, and requests for clarification, including those that arise after reports have been issued by your firm.

H. METHODOLOGY

Please describe the methodology you will use to produce the various types of appraisal reports listed above in **Paragraph B**.

I. ADMINISTRATIVE RULES

Review RFP **Attachment B, Administrative Rules Governing this Request for Proposal**. Indicate if these are acceptable, and if not, please explain.

J. SAMPLE MASTER AGREEMENT

Review RFP **Attachment C, Sample Standard Agreement**. This agreement will be the basis for contracts governing the agreements between the AOC and selected Service Providers. Indicate if these terms and conditions are acceptable, and if not, please explain.

K. ADDITIONAL INFORMATION

Provide any additional information you believe should be considered in the evaluation of your proposal limiting it to two (2) pages.

OFFER PERIOD

A Proposer's proposal is an irrevocable offer for ninety (90) days following the proposal due date. In the event a final contract has not been awarded within this ninety (90) day period, the AOC reserves the right to negotiate extensions to this period.

Signature (must be completed by proposer):

SIGNED this _____ day of _____, 20_____.

By: _____
Signature Title

Print Name: _____