



Good morning, thank you for attending the pre-submittal conference for the Request for Qualifications for Real Estate Appraisal and Appraisal Review Professional Services.

During this meeting, video and microphone functions are disabled but attendees do have chat capabilities.

If you would please take a moment to type in the chat your full name, company name and email address, we would appreciate a record of attendance for this meeting.

This presentation will provide an overview of the solicitation requirements. The presentation should take about 30 minutes and we have about 35 slides to review.

# Introductions

## Land Conservation Program - Infrastructure Division

Trey Vick, State Parks Project Manager

Stan David, Senior Project Manager

John Hodges, Portfolio Manager

## HUB Program - Purchasing & Contracting Division

Christina Brown, Program Manager

## Contracting Branch - Infrastructure Division

Lydia Reynolds, Contract Manager

Primary Point of Contact for Solicitation

Phone: 512-389-4507

Email: [lydia.reynolds@tpwd.texas.gov](mailto:lydia.reynolds@tpwd.texas.gov)

Joining us this morning we have a few stakeholders with the TPWD Land Conservation Program:

- ▶ Trey Vick, State Parks Project Manager
- ▶ Stan David, Senior Project Manager
- ▶ John Hodges, Portfolio Manager

Christina Brown, Program Manager for the HUB Program within Purchasing & Contracting Division was unable to attend but Christina provided us with slides for an overview of HUB subcontracting requirements.

My name is Lydia Reynolds, I am a contract manager within the Infrastructure Division, and the primary point of contact for this solicitation.

# Communication



**Single Point of Contact** during the solicitation and award period:

Lydia Reynolds, Contract Manager  
lydia.reynolds@tpwd.texas.gov

**PROHIBITED COMMUNICATIONS:** Attendees are reminded that questions will not be answered during this meeting. TPWD representatives will not answer questions or discuss contents of the solicitation with any potential respondent or their representative. Failure to observe this restriction may disqualify respondent. Attempts to ask questions by phone or in person will not be allowed or recognized as valid.

Questions should be submitted by email before **5:00 PM (CT), June 12, 2024**. See RFQ Section 1, Subsection 3.3 for submission requirements.

Answers will be posted within a week of the deadline for questions as addendum to the solicitation, it is the respondent's responsibility to check for addenda. See RFQ Section 1, Subsection 3.5 for information.

All communication shall be in writing and directed to the point of contact for the solicitation.

Oral instructions, clarifications, or answers to questions are NOT binding. Failure to adhere to this communication requirement could disqualify your submission.

Questions regarding this solicitation should be sent by email prior to 5pm Wednesday, June 12<sup>th</sup>

Responses to those questions will be in the form of written addenda and published on the TPWD and ESD websites.

Respondents are responsible for checking the solicitation listing for addenda, signing and submitting those with the response.



# Background

- 2020 Appraisal Services Contracts
  - ▶ Awarded Seven Firms
  - ▶ \$400,000 in task order awards (April 2024)
  - ▶ Contracts Expire August 31, 2024
- State Parks Land Acquisitions
  - ▶ New Parks
  - ▶ Inholdings
  - ▶ Properties Adjacent to Current Parks
- Infrastructure Division Portfolio Management
  - ▶ Actual Fee Simple Appraisals
  - ▶ Informal Opinion of Value
  - ▶ Fair Market Valuations for Acquisition, Disposal and Exchange of land
- Recreational Grants & Local Park Grants
  - ▶ Appraisal Consultations
  - ▶ Appraisal Reviews

Texas Parks and Wildlife oversees various programs to promote conservation and recreation. Two primary programs within TPWD that frequently utilize appraisal services contracts are the **Land Conservation Program** and **Recreational and Local Park Grants Programs**

**The Land Conservation Program** focuses on preserving natural landscapes, wildlife habitats, and open spaces. It involves acquiring land for state parks, wildlife management areas, and other conservation purposes. **The Recreational and Local Park Grants Programs** support local governments and communities in developing and enhancing public parks and recreational facilities.

These programs rely on professional appraisals for determination of fair market value of land to ensure transactions are equitable, financially sound and beneficial to the public.

Recent legislation has increased access to financial resources for Texas Parks and Wildlife, which is expected to increase the need for appraisal services.

In 2020, TPWD awarded contracts to seven firms for professional real estate appraisal services. These contracts, which facilitated over \$400,000 in task orders, will expire on August 31st. As TPWD continues its efforts in conservation and recreation, the expiration of these contracts signals the need for a new solicitation to maintain these vital programs.

# Solicitation

## **Request for Qualifications (RFQ)**

Texas Government Code, Title 10, Subtitle F, Chapter 2254 A.  
Professional Services

TPWD seeks a geographically diverse pool of highly qualified providers to perform appraisal services statewide, including rural areas.

Selection of the most highly qualified professional services provider will be based upon demonstrated competence and detailed credentials. TPWD intends to award more than one blanket contract for these services. The resulting contracts awarded do not guarantee volume of task order or commitment of funds.

**Initial Contract Term:** Three Years, to expire August 31, 2027

**Renewal Option:** Two, One Year options with mutual agreement

**Total Contract Term:** Maximum of Five Years

This solicitation complies with Texas Government Code, Title 10, Subtitle F, Chapter 2254 A. Professional Services. The method of solicitation is a Request for Qualifications referred to as an RFQ. This method allows respondents to submit a written response addressing qualifications, experience, approach, and other factors to ensure respondent meets the requirements. TPWD then reviews and evaluates the qualifications based on criteria and weights specified in the RFQ.

A key detail of this type of solicitation is that an awarded contract does not guarantee a specific volume of projects or a commitment of funds. Task Orders are the individual projects assigned to blanket firms.

The Task Order process begins with selection of a blanket firm by the project team, the contract manager then submits a request for task order proposal to the selected firm. Following receipt of the proposal, the project team evaluates the proposal, following agreement, a task order award notice is issued.

TPWD reserves the right to issue task orders based upon the project requirements. With this solicitation we intend to award up to seven contracts for professional real estate appraisal services.

The initial term of the contract is three years, expiring August 31, 2027.

Two renewal options are available with mutual agreement, each for one year, potentially extending the contract term to five years.

# Qualifications & Experience

## Section 1, Subsection 2

**Qualifications Validity Period** – Qualifications shall remain valid for ninety days from submittal deadline to allow for evaluation, selection and approvals.

**Eligible Respondents** – Only lawfully formed business organizations will be awarded a contract, if an out of state organizations wishes to submit qualifications a certificate of authority to do business in Texas must be included in response.

**Minimum Qualifications** – Section 1, Subsection 2.3 includes specific experience required to be eligible for award of a contract, partial list of minimum qualifications:

- ❖ TALCB Licensing
- ❖ No Disciplinary Action History Past 5 Years
- ❖ Five Years Experience as Certified General Real Estate Appraiser
- ❖ Three Years Experience Appraising Rural Properties
- ❖ Demonstrated Compliance w/ USPAP Standards and Requirements

RFQ Section 1, Subsection 2 includes information on Qualifications and Experience  
The Qualifications Validity Period is ninety days from the submittal deadline.

Only lawfully formed business organizations are eligible for contract award, if an out of state organization wishes to be considered, a certificate of authority to do business in Texas must be included with the response.

Please review the Minimum Qualifications in Subsection 2.3 which includes the required experience to be eligible for contract award.

# Terms

## Section 1, Subsection 5

- ❖ No Reimbursement for Costs
- ❖ Eligible Respondents
- ❖ Historically Underutilized Business (HUB) Requirements
- ❖ State Licensing & Certification of Respondents
- ❖ Insurance Requirements
- ❖ Debriefing Process
- ❖ Protest Procedures
- ❖ Acceptance of Evaluation Methodology
- ❖ Conflict of Interests

Section 1, Subsection 5 includes the Terms of the RFQ.  
This section includes information on... (read bullets)

## Subcontracting with Historically Underutilized Businesses (HUBs)

Submit Questions:

**HUB@TPWD.TEXAS.GOV**

Contact HUB Program Staff:

**(512) 389-4784**  
**(903) 920-2185**

Program Information:

<https://tpwd.texas.gov/business/bidops/hub/HSP/>

When doing business with Texas agencies, more often than not a requirement of a contract or task order will be to make an effort to provide subcontracting opportunities to historically underutilized businesses. This is accomplished with a HUB Subcontracting Plan referred to as an HSP.

This solicitation does not require a HUB Subcontracting Plan to be submitted with the Response.

The HSP Requirement falls at the Task Order level. When task orders have subcontracting opportunities and an expected value near to or exceeding \$100,000, the contract manager will include a request for HSP with the request for task order proposal.

The TPWD HUB team is available to provide guidance on preparing an HSP or to review an HSP prior to submittal with the task order proposal.



# HUB Subcontracting Opportunities

HUB Subcontracting Goal: 23.7%

Potential Subcontracting opportunities associated with the contract:

- HUB lists will be provided for applicable trades/disciplines,
- these are not required areas of subcontracting,
- this would not be a comprehensive list of subcontracting opportunities.

Additional resources are available on the Texas Comptroller's website.

Reach out to TPWD HUB Program for assistance with the HUB Subcontracting Plan!

TEXAS  
POWER &  
WATER

**Infrastructure HUB Subcontracting Opportunities**

Date of HUB List: \_\_\_\_\_ Project/Contract Number: \_\_\_\_\_

**Description:**  
In accordance with Texas Administrative Code, Title 34, Part 1, Chapter 20, Subchapter D, Division 1, state agencies shall make a good faith effort to utilize Historically Underutilized Businesses (HUBs) in contracts for Construction, Services (including Professional and Consulting Services), and Commodity procurements. The State of Texas Policy is to contract directly with HUBs or indirectly through subcontracting opportunities. Each Contractor/vendor shall also make a good faith effort to utilize HUBs in subcontracting opportunities.

TPWD estimates the value of this contract to be \$ \_\_\_\_\_ and further sets the HUB subcontracting goal at \_\_\_\_\_ % of the contract's value.

(Subcontractor - A person who contracts with a vendor to work, to supply commodities, or contribute toward completing work for a governmental entity as defined in Texas Government Code 2251.001.)

**NOTE:** The following list identifies potential subcontracting opportunities. You could have other opportunities or may self-perform some opportunities. You are not required to subcontract every potential subcontracting opportunity.

Class & Item Code: Trades/Disciplines/Major Supplies:	Class & Item Code: Trades/Disciplines/Major Supplies:

**HUB LIST:**  
TPWD does not endorse, recommend or attest to the capabilities of any company or individual listed. The list is strictly provided as a convenience to respondents.

Respondents may also access a list of HUB subcontractors by referencing the above Class and Item codes in a Centralized Master Bidders List (CMBL) search at <https://mycpa.spa.state.tx.us/fopasscontbsearch/index.jsp>.

Comptroller HSP information: <https://www.comptroller.texas.gov/purchasing/vendor/hub/forms.php>.

A few minority and women trade organizations and development centers are listed below. For a more complete list, please visit <https://www.comptroller.texas.gov/purchasing/vendor/hub/resources.php>.

<b>National Association of Minority Contractors, Inc. - Greater Houston</b> 1337 W. 49th St., Ste. B165 Houston, TX 77018 (832) 787-1842 phone <a href="mailto:execdir1@yahoo.com">execdir1@yahoo.com</a> email <a href="http://www.namctexas.org">www.namctexas.org</a> website	<b>Texas Association of African American Chambers of Commerce</b> 807 Brazos St., Ste. 710 Austin, TX 78701 (512) 595-9810 phone <a href="mailto:info@taaac.org">info@taaac.org</a> email <a href="http://www.taaac.org">www.taaac.org</a> website	<b>Texas Association of Mexican American Chambers of Commerce</b> 806 Main St. Buda, TX 78610 (512) 444-9727 phone <a href="mailto:president@tamaco.org">president@tamaco.org</a> email <a href="http://www.tamaco.org">www.tamaco.org</a> website
<b>Asian Contractor Association</b> 7600 Chevy Chase Dr., Ste. 300 Austin, TX 78752 (512) 926-5400 phone (512) 926-5410 fax <a href="mailto:asiancontractor@gmail.com">asiancontractor@gmail.com</a> email <a href="http://www.acca-austin.com">www.acca-austin.com</a> website	<b>Women's Business Council - Southwest</b> 5605 N. MacArthur Blvd., Ste. 220 Irving, TX 75038 (800) 451-5697 office (toll free) (817) 269-0649 fax <a href="mailto:info@wbcswest.org">info@wbcswest.org</a> email <a href="http://www.wbcswest.org">www.wbcswest.org</a> website	<b>Women's Business Enterprise Alliance</b> 9800 Northwest Freeway, Ste. 120 Houston, TX 77092 (713) 981-9232 office (713) 981-9242 fax <a href="mailto:info@wbea-texas.org">info@wbea-texas.org</a> email <a href="http://www.wbea-texas.org">www.wbea-texas.org</a> website

For information on the TPWD HUB program, assistance with completing forms, or to obtain HUB lists if web access is not possible, please contact the TPWD HUB staff at (512) 389-4784 or [hub@tpwd.texas.gov](mailto:hub@tpwd.texas.gov).

PVD 0901 - A0900 (5/21)

I'll quickly review what you can expect from a Contract Manager when an HSP is required for a task order.

The Contract Manager will include a completed Infrastructure HUB Subcontracting Opportunities form with the Request for Proposal.

The information included is the project identifier, project description, estimated value of the task order, and the HUB subcontracting goal which is 23.7% for professional services.

Also included on this form will be the Class & Item Codes for the Trades or Disciplines we have identified as potential subcontracting opportunities.

For your convenience, the contract manager will use the Comptroller's public database to create a list of HUBs for each of the class and item codes listed on the form.

# HUB Lists by Class & Item

HUB lists will be provided for the trades and disciplines included on the HUB Subcontracting Opportunities form.

Lists Include:

- ❖ Vendor ID
- ❖ Company Name
- ❖ Contact Person
- ❖ City
- ❖ Email
- ❖ Phone
- ❖ Business Description
- ❖ CMBL Status
- ❖ HUB Status

Item ID	Item Name	Item Description	City	State	Business Description	CMBL Status	HUB Status
146671000	CONCRETEWORK	Concrete Work	AMARILLO	TX	General Contractor, Commercial Building, See Specifications, Description and Item Code for additional information. General Work	Yes	Yes
146672000	CONCRETEWORK	Concrete Work	AMARILLO	TX	General Contractor, Commercial Building, See Specifications, Description and Item Code for additional information. General Work	Yes	Yes
146673000	CONCRETEWORK	Concrete Work	AMARILLO	TX	General Contractor, Commercial Building, See Specifications, Description and Item Code for additional information. General Work	Yes	Yes
146674000	CONCRETEWORK	Concrete Work	AMARILLO	TX	General Contractor, Commercial Building, See Specifications, Description and Item Code for additional information. General Work	Yes	Yes
146675000	CONCRETEWORK	Concrete Work	AMARILLO	TX	General Contractor, Commercial Building, See Specifications, Description and Item Code for additional information. General Work	Yes	Yes
146676000	CONCRETEWORK	Concrete Work	AMARILLO	TX	General Contractor, Commercial Building, See Specifications, Description and Item Code for additional information. General Work	Yes	Yes
146677000	CONCRETEWORK	Concrete Work	AMARILLO	TX	General Contractor, Commercial Building, See Specifications, Description and Item Code for additional information. General Work	Yes	Yes
146678000	CONCRETEWORK	Concrete Work	AMARILLO	TX	General Contractor, Commercial Building, See Specifications, Description and Item Code for additional information. General Work	Yes	Yes
146679000	CONCRETEWORK	Concrete Work	AMARILLO	TX	General Contractor, Commercial Building, See Specifications, Description and Item Code for additional information. General Work	Yes	Yes
146680000	CONCRETEWORK	Concrete Work	AMARILLO	TX	General Contractor, Commercial Building, See Specifications, Description and Item Code for additional information. General Work	Yes	Yes
146681000	CONCRETEWORK	Concrete Work	AMARILLO	TX	General Contractor, Commercial Building, See Specifications, Description and Item Code for additional information. General Work	Yes	Yes
146682000	CONCRETEWORK	Concrete Work	AMARILLO	TX	General Contractor, Commercial Building, See Specifications, Description and Item Code for additional information. General Work	Yes	Yes
146683000	CONCRETEWORK	Concrete Work	AMARILLO	TX	General Contractor, Commercial Building, See Specifications, Description and Item Code for additional information. General Work	Yes	Yes
146684000	CONCRETEWORK	Concrete Work	AMARILLO	TX	General Contractor, Commercial Building, See Specifications, Description and Item Code for additional information. General Work	Yes	Yes
146685000	CONCRETEWORK	Concrete Work	AMARILLO	TX	General Contractor, Commercial Building, See Specifications, Description and Item Code for additional information. General Work	Yes	Yes
146686000	CONCRETEWORK	Concrete Work	AMARILLO	TX	General Contractor, Commercial Building, See Specifications, Description and Item Code for additional information. General Work	Yes	Yes
146687000	CONCRETEWORK	Concrete Work	AMARILLO	TX	General Contractor, Commercial Building, See Specifications, Description and Item Code for additional information. General Work	Yes	Yes
146688000	CONCRETEWORK	Concrete Work	AMARILLO	TX	General Contractor, Commercial Building, See Specifications, Description and Item Code for additional information. General Work	Yes	Yes
146689000	CONCRETEWORK	Concrete Work	AMARILLO	TX	General Contractor, Commercial Building, See Specifications, Description and Item Code for additional information. General Work	Yes	Yes
146690000	CONCRETEWORK	Concrete Work	AMARILLO	TX	General Contractor, Commercial Building, See Specifications, Description and Item Code for additional information. General Work	Yes	Yes

Search for HUBs on Texas Comptroller of Public Accounts webpage:  
<https://mycpa.cpa.state.tx.us/tpasscmlsearch/tpasscmlsearch.do>

The lists provided by the contract manager will include ONLY active HUBs. Information provided includes: (see bullets)  
 Today we have Christina Brown with us. Christina is the HUB Program Manager for Texas Parks and Wildlife. Christina is here to share some important information about the HUB Program.



HSP – HUB  
Subcontracting  
Plan

## IMPORTANT NOTES

- ▶ If your HSP does not meet good faith effort requirements (GFE), your response will be disqualified.
- ▶ HUBs must be Texas Certified through the Comptroller's office to comply with the HSP. *Not every HUB Zone-certified, City/County HUB, MBE/WBE/DEBE, etc. is Texas Certified.*
- ▶ HUB Status on CMBL must be active.
- ▶ HUB Prime Contractors must still complete the HSP.

**When an HSP is required, please read the entire HSP and utilize the HSP Quick Checklist.** There are four ways to complete the HSP based on the checklist.

For task orders, if your HSP does not meet good faith effort requirements, the HSP process would need to begin again with soliciting the HUB vendors for subcontracting opportunities.

HUBs must be Texas-certified through the Comptroller's office to comply with the HSP. Not every HUB Zone-certified, City/County HUB, MBE/WBE/DBE, etc. is Texas-certified. If you are

searching for HUBs on the [Centralized Master Bidders List \(CMBL\)/HUB Directory](#), please be sure that their HUB status is active. HUBs may be active or inactive on the CMBL.

If you are a HUB prime contractor, you must still complete the HSP.

## IMPORTANT NOTES

- ▶ HUB Notification deadline: HUBs are not required to respond. You are only required to give them an opportunity to respond. (Method A and Method B)
  - ▶ Make sure you allow seven working days. The date of the notice does not count towards the seven days.
  - ▶ Ensure you take into account any state holidays or days in which state agencies are closed; those days do not count as one of the required days.
  - ▶ Ensure you include PROOF of your notification (emails, read receipts, etc.)
- ▶ The HUB Program and the HSP are designed to give HUB vendors an opportunity to compete for state contract dollars as a prime contractor or subcontractor. You are not required to subcontract to HUBs.

HUBs are not required to respond. You are only required to give them an opportunity to respond.

The HUB Program and the HSP are designed to give HUB vendors an opportunity to compete for state contract dollars as a prime contractor or subcontractor. You are not required to subcontract to HUBs, and You are not required to subcontract every opportunity that TPWD has identified as a potential subcontracting opportunity in the HUB Subcontracting Opportunities form (PWD-991 or PWD-991a).

## PRELIMINARY REVIEWS

- ▶ Once a decision has been made to submit a response, the vendor's staff responsible for processing the HSP should contact TPWD HUB Administration as soon as possible for assistance.
- ▶ TPWD HUB Administration is available throughout the HSP process to ensure your HSP meets good faith effort requirements. If necessary, we will provide step-by-step, page-by-page guidance before you start the HSP.
- ▶ HSPs can be reviewed prior to the response date. We recommend using this opportunity for a preliminary review of the HSP, but *please allow time for you to correct any issues that may be found.*

JFO

When an HSP is required, the vendor's staff responsible for processing the HSP should contact TPWD HUB Administration for assistance.

TPWD HUB Administration is available throughout the HSP process to ensure your HSP meets good faith effort requirements.

HSPs can be reviewed prior to the response date.

## Slide 14

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**JFO**

Is there a good amount of time that they should shoot for to submit to HUB? Like at least a week before responses are due?

Jennifer Feliciano, 2024-05-31T20:58:38.234



## PRELIMINARY REVIEWS

continued

- ▶ To request a preliminary review, please submit your draft of the HSP via email to TPWD HUB Administration at [hub@tpwd.texas.gov](mailto:hub@tpwd.texas.gov)
- ▶ The official review of the HSP occurs after it has been submitted with the response.
- ▶ TPWD HUB Administration's goal is to see all responses pass the HSP review.

HSPs can be reviewed prior to the response due date. We recommend utilizing this opportunity for a preliminary review of the HSP, but please allow time for you to correct any issues that may be found.

To request a preliminary review, please submit your draft of the HSP to the email shown.

The official review of the HSP occurs **AFTER** it has been submitted w/ the proposal. The contract manager will send the finalized HSP to HUB for review after negotiations and any revisions to the proposal are complete.

Our goal is to see all responses pass the HSP review – the more competition, the better value to

the state. If necessary, we will provide step-by-step, page-by-page guidance before you start the HSP.

# Additional Information

- ▶ **Additional** – more detailed pre-submittal information on the HSP process can be found at <https://tpwd.texas.gov/business/bidops/hub/HSP/>
- ▶ TPWD has audio and video, a PowerPoint, and a Word Document at the link above with more in-depth information.

# Questions?

Call or email HUB Administration

Phone: 512-389-4793

Email: [hub@fpwd.texas.gov](mailto:hub@fpwd.texas.gov)

# Executive Summary

## RFQ Section 2

- ▶ Land Conservation Program Overview
- ▶ Program Assumptions
- ▶ Selected Respondent Requirements
  - ▶ Response Times
  - ▶ High Priority Projects
- ▶ Scope of Services
  - ▶ USPAS
  - ▶ Yellow Book
  - ▶ TPWD Recreation Grants Standards
  - ▶ LWCF Appraisal Standards

Thank you Christina, we appreciate your time today.

We are at little past the halfway point of our presentation. We will continue on with RFQ Section 2, contains the Executive Summary.

This section includes detailed information regarding respondent requirements and scope of services.

Please note the language in the solicitation regarding high priority projects. With the recent legislative changes, the Land Conservation Program is forecasting 15% of projects may be high priority projects which necessitate swift action and commencement of work.

As each project is different, we can expect a variety in size and scope of the task orders.

# Schedule of Events

## RFQ Section 3, Subsection 1

RFQ Issue Date	May 24, 2024
Online Pre-Submittal Conference	June 5, 2024, at 10:00 AM
Questions Due	June 12, 2024, at 5:00 PM
Answers by Addendum (estimated)	June 19, 2024
Response Due Date	July 12, 2024, at 2:00 PM
Evaluation Period	July 15-19, 2024
Oral Presentations (if necessary)	Aug 1-2, 2023
Anticipated Contract Award	September 1, 2024

Section 3 Subsection 1 is the schedule of events...

Next Wednesday, June 12<sup>th</sup> is the deadline to submit questions about the solicitation. Responses shall be in the form of an addendum and posted to the ESD and TPWD websites on or about June 19<sup>th</sup>.

Responses are due by 2:00 pm on Friday, July 12<sup>th</sup>. Late responses will NOT be considered under any circumstance.

Evaluations will begin the following week. If the evaluation committee determines that oral presentations are necessary, I will communicate with respondents to schedule those appointments.

September 1<sup>st</sup> is our anticipated award date for the new blanket agreements.

# Delivery & Handling

**RFQ Section 3, Subsection 3**

**Email:** lydia.reynolds@tpwd.texas.gov  
w/ courtesy copy to  
infcontracting@tpwd.texas.gov

**Subject:** RFQ 2024 Appraisal Services Proposal

**Attachment:** ONE .pdf inclusive of all exhibits, addenda including all required signatures

**Hard Copies:** If submission of paper response is preferred see details in Subsection 3.9 for required text on outside envelope, binding, flash drive requirement, and address for delivery.

## Format of Response

**RFQ Section 3, Subsection 4**

Carefully review for formatting requirements.

RFQ Section 3, Subsection 3 provides information on Delivery and Handling of the Response.

Email is the preferred method of delivery, please send the response by email to me and courtesy copy the Infrastructure Contracting Branch general mailbox.

The Subject Line should read exactly as shown in the solicitation.

The response should be saved as a single .pdf file which includes all exhibits and addenda.

If Hard Copies are your preference, please review the information for the delivery address, required information for the outermost envelope, binding preferences and the requirement for a flash drive with the response saved as a .pdf.

RFQ Section 3, Subsection 4 provides information for formatting the response, please review this section for preferences and requirements.

# Responsibility for Addenda

## RFQ Section 3, Subsection 5

Check the ESD and TPWD websites for updates to the procurement and addenda prior to submitting a response.

Addenda could be...

- ❖ Clarifications
- ❖ Interpretations
- ❖ Questions from Respondents with Answers from TPWD
- ❖ Corrections to Exhibits
- ❖ Corrections to Solicitation

*Failure to submit signed and dated addenda,  
may result in rejection of Response!  
Check regularly and prior to deadline!*

RFQ Section 3, Subsection 5 includes language regarding the Responsibility for Addenda...

please check for addenda prior to submission of the Response.

Check for addenda frequently and up until responses are due.

It is uncommon in an RFQ, but a change to the solicitation documents may be required.

Failure to submit acknowledged addenda, may result in rejection of the Response.



# Required Response Content

## RFQ Section 3, Subsection 6

- ❖ Exhibit A - Execution of Response
- ❖ Exhibit B - Company Profile
- ❖ Exhibit C - Company Narrative
- ❖ Exhibit D - Key Personnel & Credentials
- ❖ Exhibit E - Statement of Qualifications
- ❖ Exhibit F - Performance on Past Projects & References
- ❖ Addenda

*\*Does not represent an exhaustive list of the requirements, review each Exhibit to ensure all documents requested are included in the response.*

Section 3, Subsection 6 includes a list of the required Response content:  
The list shown here is not an exhaustive list of the requirements, please review each Exhibit to ensure all information and documents requested are included in the response.

## Exhibit A Execution of Response

- ❖ Pass/Fail
- ❖ Failure to return completed document shall result in Response being considered non-responsive
- ❖ Failure to sign document shall result in Response being considered non-responsive

### EXHIBIT A – EXECUTION OF RESPONSE

NOTE: THIS EXECUTION OF RESPONSE MUST BE COMPLETED, SIGNED, AND RETURNED WITH THE REQUIRED DOCUMENTS. FAILURE TO COMPLETE, SIGN AND RETURN THE ENTIRE EXHIBIT SHALL RESULT IN REJECTION. SIGNING A FALSE STATEMENT MAY VOID THE SUBMITTED QUALIFICATIONS OR ANY AGREEMENTS OR OTHER CONTRACTUAL ARRANGEMENTS. A FALSE CERTIFICATION SHALL BE DEEMED A MATERIAL BREACH OF CONTRACT AND, AT OWNER'S OPTION, MAY RESULT IN TERMINATION OF ANY RESULTING CONTRACT.

By signature hereon, Respondent acknowledges and agrees that (1) this RFQ is a solicitation for Qualification and is not a contract or an offer to contract, (2) the submission of Qualification by Respondent in response to this RFQ will not create a contract between the Owner and Respondent, (3) the Owner has made no representation or warranty, written or oral, that one or more contracts with the Owner will be awarded under this RFQ, and (4) Respondent shall bear, as its sole risk and responsibility, any cost which arises from Respondent's preparation of a response to this RFQ.

By signature hereon, Respondent offers and agrees to furnish to the Owner the products and/or services more particularly described in its Response, and to comply with all terms, conditions and requirements set forth in the RFQ documents and contained herein.

By signature hereon, Respondent represents and warrants that:

Respondent is a reputable company regularly engaged in providing products and/or services necessary to meet the terms, conditions and requirements of the RFQ.

Respondent has the necessary experience, knowledge, abilities, skills, and resources to satisfactorily perform the terms, conditions, and requirements of the RFQ.

Respondent is aware of, is fully informed about, and is in full compliance with all applicable federal, state, and local laws, rules, regulations and ordinances;

Respondent understands (i) the requirements and specifications set forth in this RFQ and (ii) the terms and conditions set forth in the Contract documents under which Respondent will be required to operate;

Respondent, if selected by the Owner, will maintain insurance as required by the Contract, Reference Attachment 1, Owner's Insurance Requirements.

By signature hereon, Respondent certifies that all statements, information, and representations prepared and submitted in response to this RFQ are current, complete, true, and accurate. Respondent acknowledges that the Owner will rely on such statements, information, and representations in selecting the successful Respondent. If selected by the Owner as the successful Respondent, Respondent will notify the Owner immediately of any material change in any matters to which Respondent has made a statement or representation or provided information.

The undersigned certifies that I am duly authorized to submit this Response and execute a contract on my own behalf or on behalf of the Respondent listed below.

COMPANY NAME _____	AUTHORIZED SIGNATURE _____	DATE _____
ADDRESS _____	PRINTED NAME _____	
CITY _____ STATE _____ ZIP _____	TITLE _____	
( ) _____	( ) _____	
OFFICE PHONE NUMBER _____	CELL PHONE NUMBER _____	
EMAIL ADDRESS _____	FAX NUMBER _____	
TEXAS IDENTIFICATION NUMBER _____	FEDERAL EMPLOYER IDENTIFICATION NUMBER _____	

Exhibit A is the Execution of Response  
If this exhibit is not included, missing information, or unsigned, the response will be deemed non-responsive.

## Exhibit B Company Profile

- ❖ Scored Max 10 Points
- ❖ Respondent shall use this exhibit or a reasonable facsimile
- ❖ Failure to return this completed exhibit or a reasonable facsimile shall result in the Response being non-responsive.

EXHIBIT B – COMPANY PROFILE	
<p><i>Exhibit B is Scored with Maximum of 10 Points. Respondent shall use this exhibit (or reasonable facsimile) to demonstrate how they meet the requirements set forth in this solicitation. This form may be used in conjunction with the requirement to document company information. Additional pages can be added to this exhibit (or reasonable facsimile) shall result in the response being non-responsive.</i></p>	
1. Company Legal Name as registered with the Texas Secretary of State:	
2. Company Description:	
3. Principal Name and Office location:	
4. Corporate Headquarters Address with City, State & Zip Code:	
5. Year Company was Founded and/or Legally Organized:	
6. Company Ownership Structure (LLC, LLP, Corporation, etc.):	
7. State under which laws the company is organized, if not Texas, see Section 1, 2.2.:	
8. Total number of employees, locally and nationally:	
9. Percentage of Ownership:	
10. Proposed Operating Structure (parent company, affiliate, joint venture, subcontractor):	
<p>17. Disclose any potential conflict of interest your company or any of its subsidiaries, affiliates, or joint ventures, or any of its parent organizations and individuals who may be assigned to manage this project, as described in this Solicitation, including all existing or prior arrangements. If you have any potential conflict of interest, so indicate in the appropriate section of the Solicitation Response. <input type="checkbox"/> Yes <input type="checkbox"/> No. If yes, include requested information.</p>	

### Exhibit B is the Company Profile

This exhibit includes information necessary to determine the ability of the respondent to perform the work. This is a scored exhibit, with a maximum weight of TEN points. Respondent shall use this exhibit or a reasonable facsimile to demonstrate how they meet the requirements of the solicitation. If you wish to create a reasonable facsimile, be sure to maintain the numeric sequencing. Failure to submit a complete exhibit shall result in the Response being non-responsive.



**Exhibit C**  
**Company Narrative**

- ❖ Scored Max 10 Points
- ❖ Detailed narrative explaining how respondent is qualified to provide the services listed in Section 2, Subsection 1.4
- ❖ Focus on key strengths
- ❖ Failure to return exhibit (or reasonable facsimile) shall result in Response being non-responsive.

Exhibit C is the Company Narrative, this is your opportunity to tell your story as a detailed narrative explaining how your organization is qualified to provide the services listed in the Executive Summary, Section 2, Subsection 1.4. This information is necessary for evaluators to understand your expertise and experience, and how that translates to meeting the appraisal services needs.

Please focus on the strengths of your firm and your key personnel.

This is a scored exhibit, with a maximum weight of TEN points.

Respondent may use the exhibit provided or create a reasonable facsimile.

Failure to submit this exhibit shall result in the Response being non-responsive.

## Exhibit D

### Key Personnel and Resumes

- ❖ Scored Max 20 Points
- ❖ Provide ONE exhibit for EACH primary point of contact or equivalent of project manager and key staff as respondent deems appropriate.
- ❖ Include all information requested on exhibit and include TALCB licenses.
- ❖ Failure to return the requested information and documentation shall result in Response being non-responsive.



#### Exhibit D is the Key Personnel and Resumes

We are requesting detailed information on key personnel. We do not need this information for everyone within the organization, only those overseeing the execution of a resulting contract, acting as primary liaison between the organization and the TPWD project team, the equivalent of project manager or other key staff you deem appropriate.

Provide one exhibit D for **each** person you deem appropriate, including a copy of their TALCB Certified General Appraiser license and the following information:

- Name, title
- Subject areas of expertise
- Relevant certifications and licenses
- Experience w/ similar programs within the past five years
- Total years with your organization
- Total years experience

Exhibit Ds are scored, with a maximum cumulative weight of TEN points.

Failure to submit Exhibit D or submission of incomplete Exhibit D shall result in the Response being non-responsive.

## Exhibit E Statement Of Qualifications

- ❖ Scored Max 30 Points
- ❖ Submit numbered responses which provide specific support for meeting the minimum qualifications outlined in the exhibit:
  1. TALCB Licensed
  2. Five Years w/o TALCB Disciplinary Action
  3. 3 Years Rural Property Appraisal Experience
  4. 5 Years General Real Estate Appraisal Experience
  5. Demonstrate USPAP Compliance
  6. Demonstrate USFLA (Yellow Book) Compliance
  7. Demonstrate Availability for High Priority/Time Sensitive Appraisals
  8. Demonstrate Competency for Market Area
  9. Demonstrate Access to Commercial Market Data Sources
  10. Provide List of Market Areas of Expertise and Experience w/ Various Types of Real Estate
  11. Identify Service Areas within Texas
- ❖ Failure to provide the information requested shall result in Response being non-responsive.

### Exhibit E is the Statement of Qualifications

We are requesting written responses to eleven prompts which summarize how your organization meets the minimum qualifications. Provide a written response to each OR include specific information to direct the evaluators to another exhibit within the response which includes the necessary information to satisfy the minimum qualification.

Exhibit E is scored, with a maximum weight of THIRTY points.

Failure to submit or submission of an incomplete exhibit shall result in the Response being non-responsive.

## Exhibit F Performance on Past Projects & References

- ❖ Scored Max 30 Points
- ❖ Submit the following:
  - Past Project Information, 5 Non-TPWD projects,
  - Sample Work Product, Non-TPWD ranch or large rural acreage,
  - References, 3 Non-TPWD references w/ requested details.
- ❖ Failure to provide information requested shall result in Response being non-responsive.

### Exhibit F is Performance on Past Projects and References

We are requesting...

FIVE projects which are not TPWD projects,  
a sample work product for a ranch or large rural acreage which is not a TPWD project,  
detailed information for three references for projects completed within the past five  
years which are not TPWD references.

Please confirm contact information for your references, the contract manager will  
verify references by email correspondence.

Exhibit F is scored, with a maximum weight of THIRTY points.

Failure to submit a complete exhibit shall result in the Response being non-responsive.

# Addenda

- ❖ Pass/Fail
- ❖ Submit each addendum with company name, signature and date signed with response.
- ❖ Addendum posted on ESBD and TPWD websites with solicitation documents.
- ❖ It is the responsibility of the respondent to obtain information regarding addenda in a timely manner.

Texas Parks and Wildlife Department  
Infrastructure Division  
4200 Smith School Road  
Austin, Texas 78744

**ADDENDUM**

Addendum Number: \_\_\_\_\_ Dated: \_\_\_\_\_  
Solicitation Number: \_\_\_\_\_  
Solicitation Title: \_\_\_\_\_  
Due Date/Deadline: \_\_\_\_\_  
Contract Manager: \_\_\_\_\_

PURPOSE OF ADDENDUM:

Except as provided herein, all terms and conditions of the document referenced herein, remain unchanged and in full force and effect. The following are official revisions, specifications and/or clarifications to this solicitation. This Addendum shall be attached to and form a part of the referenced solicitation document and any resulting awarded contract and must be considered in your response.

Respondents are advised to check for updates, addenda issuance, and proposal opening date changes through the Comptroller's website under Electronic State Business Daily (ESBD) at <http://www.tbsmartbuy.com/sp>

QUESTIONS AND ANSWERS

1: \_\_\_\_\_  
1: \_\_\_\_\_  
2: \_\_\_\_\_  
2: \_\_\_\_\_

Attachments: \_\_\_\_\_

Respondents are to acknowledge receipt of this Addendum. Return a signed copy of this notice with your response submission.

acknowledge receipt of this addendum.

Respondent Company Name \_\_\_\_\_  
Respondent's Authorized Signature \_\_\_\_\_ Date \_\_\_\_\_

We mentioned addenda earlier in the presentation, this is a reminder to check for addenda prior to submission of the Response.

While it may be uncommon for an RFQ, it is possible for something to be changed within the solicitation.

Addenda are commonly used to respond to official questions asked by respondents. Questions posed by other respondents and the answers to those questions could be a benefit to your response.

We have a few what if scenarios...

What if... an addendum is posted **AFTER** you have submitted the Response... you would need to submit the fully acknowledged addendum by email and refer to the Response which was previously submitted.

What if... you **discover a change is required** in your Response after it has been submitted?

If this occurs prior to the response deadline, make corrections to the response and re-submit the entire response. Communicate in writing a retraction of the previously submitted Response.



# Attachments to the RFQ

(do not submit with response to RFQ)

## **Attachment 1, Insurance Requirements**

- ❖ Review for details on required insurance

## **Attachment 2, Professional Services Fee Schedule**

- ❖ Review for details on rates and firm fixed prices

## **Attachment 3, Professional Services Agreement**

- ❖ Review for terms of the agreement

## **Attachment 4, Essential Clauses, Affirmations and Additional Contract Requirements**

- ❖ Review for TPWD and State of Texas Comptroller's required clauses for contracts

The next section within the RFQ includes the Attachments to the RFQ.

Attachment 1 provides Insurance Requirements for Professional Services Firms  
Attachment 2 provides information on the Firm Fixed Prices for Appraisal Services Assignments

Attachment 3 is the Professional Services Agreement which is tailored to Appraisal Services

Attachment 4 includes current TPWD and Texas Comptroller Essential Clauses, Affirmations and Additional Contract Requirements which is tailored to the Appraisal Services

Do not submit these attachments with the Response

If selected by the evaluation committee for contract award we would request the certificate of insurance, fee schedule and execution of the agreement.

Following execution of an agreement the Certificate of Insurance, Fee Schedule and Essential Clauses, Affirmations and Additional Contract Requirements documents would become exhibits to the Professional Services Agreement.

# Evaluation of Responses

## Step 1 - Administrative Review by Contracting

- ❖ Review for completeness.
- ❖ Failure to meet minimum qualifications will result in disqualification.
- ❖ No late Responses!

## Step 2 - Initial Evaluation Based upon Established Criteria

Evaluation Criteria	Point Value
Acknowledged, Signed and Dated Addenda	Pass/Fail
Execution of Response (Exhibit A)	Pass/Fail
Company Profile (Exhibit B)	10 points
Company Narrative (Exhibit C)	10 points
Respondent's Key Personnel & Credentials (Exhibit D)	20 points
Statement of Qualifications (Exhibit E)	30 points
Performance on Past Projects & References (Exhibit F)	30 points
<b>Subtotal</b>	<b>100 points</b>
Oral Presentation (if deemed necessary by Owner)	25 points
<b>Total</b>	<b>125 points</b>

We are nearly at the end of the presentation, briefly we will go over the Evaluation of Responses

Step One is the Administrative Review by the Contract Manager

- Only complete responses with all required submittal documents will be considered.
- Failure to meet the minimum qualifications will result in a Response being declared non-responsive.
- Responses that do not conform to instructions may be rejected.
- Responses received by TPWD Infrastructure Contracting Branch **after the exact date and time** specified as the deadline will NOT be considered and will be returned unopened to the respondent.

Responses which successfully pass Step 1 move on to Step 2 which is evaluation by the Committee. Committee members will independently evaluate and score each Response based on the criteria published in the solicitation. Responses are evaluated to determine respondent's ability to satisfy TPWD requirements. Responses are scored on a weighted system to determine the best value as shown in the table included in the solicitation. Total possible score for Step 2 is 100 Points.

# Evaluation of Responses

## Step 3 - Short List and Oral Presentations:

- ✓ oral presentations at discretion of evaluation committee,
- ✓ award may be made without oral presentations,
- ✓ oral presentations by designated point of contact,
- ✓ oral presentations would determine final ranking.

## Award

Respondents selected for award will be notified by a **Notice of Selection** and request to submit the required insurance (Attachment 1) and Schedule of Applicable Rates (Attachment 2)

Owner and Respondent would then enter into a Professional Services Agreement, see Attachment 3 and Attachment 4

If deemed necessary, the top ranked respondents will move on to Step Three which includes oral presentations by respondents to the evaluation committee. Specific questions would be sent in advance to the respondent. The oral presentation would include responses to those questions and should not include additional information.

If oral presentations are deemed necessary, the point of contact identified in the **Response Exhibit B, Section 13 is expected to** facilitate and conduct the presentation.

Committee members would then evaluate and score the oral presentations for a maximum of twenty-five points.

Award of a contract may be made without discussions or oral presentations, if in the best interest of the state.

## **AWARD of CONTRACT**

The highest ranked respondents will be selected for award of a contract with a Notice of Selection. The notice of selection includes a request for the required insurance and fee schedule. Upon receipt of the required documents the award process would begin.

# Solicitation Milestones



## Deadline to Submit Questions

5 PM, Wednesday, June 12, 2024



## Issuance of Q&A Addendum

Estimated Wednesday, June 19, 2024



## Responses Due

2 PM, Friday, July 12, 2024

Final reminder for dates to remember!

# Questions?

Deadline to Submit Questions 5:00 PM, June 12, 2024

**Contact:** Lydia Reynolds  
[lydia.reynolds@tpwd.texas.gov](mailto:lydia.reynolds@tpwd.texas.gov)  
Office (512) 389-4507

Submit questions by email. Call only if you do not receive emailed acknowledgement of receipt of the question.

Questions answered by addendum, posted to ESBD and TPWD websites.

## Avoid Disqualification:

- ❖ fill in every blank
- ❖ sign all required documents
- ❖ include every submittal with required attachments
- ❖ double check everything prior to sending
- ❖ secondary review prior to submission

If anyone has questions, my contact information is included on this slide, I've provided my email address and office phone number.

Telephone contact should only occur only after you have sent an email. If I have not responded to your email acknowledging receipt, please call.

**If you have an urgent matter, please send an email and immediately follow up with a phone call.**

This presentation with commentary will be saved as a .pdf file and published with the solicitation on the ESBD and TPWD websites.

Please see tips to avoid disqualification of the Response:

Fill in every blank, if not applicable, please write N/A.

Sign all required documents, if not signed its not responsive.

Double check all exhibits and supporting documents are included.

Have someone within your organization review prior to submission of the Response.



This concludes our review of the solicitation; we appreciate your time and look forward to receiving your response!