



## APPROVAL REQUEST FOR A BEYOND 5 YEAR CONTRACT TERM

Date of Submission:

For Professional Services submit document via SAP Requisition. Refer to the [Contact and Commodity Assignment List](#) for buyer code guidance.

For Goods & Related Services refer to [Contact and Commodity Assignment List](#) for buyer code guidance.

### SECTION I

Service Agreement Number:	4300015923 (previously 4400006549)		
Contractor/Consultant:	Hulberg & Associates / Valbridge		
Current Contract Start Date:	9/10/2018	Current Contract End Date:	7/2/2019
Total Current Value of the Service Agreement:	\$ 500,000.00	Budget Unit #:	0263
Description of Service:	Property Appraisal Services		
User Agency/Department(s):	Facilities and Fleet (FAF)		
Requesting Agency/Department Contract Manager/Coordinator	Name:	Loretta Smith	
	Phone:	408-993-4630	
	Email:	loretta.smith@faf.sccgov.org	

### SECTION II

Recommended # of Months Extension:	6
Recommended End Date:	12/31/2019
Recommended Additional Amount:	\$100,000
Recommended Total Value of the Service Agreement:	\$600,000

### SECTION III

Mark appropriate box for Contract's Signature Authority

<input checked="" type="radio"/>	Board of Supervisors
<input type="radio"/>	Delegated to Department Head or designee
<input type="radio"/>	Director of Procurement



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### SECTION IV

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 V, below].

### SECTION IV continued

Provide BRIEF but CONCISE details to validate the EXCEPTION(S) selected above

In July 2014 the County executed an agreement with Norm Hulberg (dba Valbridge & Associates) to perform professional property appraisals and prepare summary reports to meet due diligence requirements. Four amendments to the agreement have been executed since inception. The current amendment is set to expire July 2, 2019. Due to the unusually large number of recent property acquisitions and purchases contemplated by the County in support the County’s core mission, the need for this service is projected to extend beyond the current end date. An extension beyond the five years is required to allow due diligence to proceed while allowing time to prepare a new solicitation for appraisal services.



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### SECTION V

If relying upon Exception (10), the OCCM or the Director of Procurement, as applicable, has discretion to approve a contract term for more than five years. Provide a narrative explanation below:

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

Provide MAI professional real property appraisals and prepare summary appraisal reports to assist the county in determining the current fair market value of various properties that may include commercial land, industrial, warehouse, office, R&D, medical offices, hotels/motels, single and multi-family residential, etc.

#### 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 original contract (PO 4400006549) was awarded as the result of an Informal Competitive Procurement (ICP). The original agreement had start date 07/09/2014, and end date 07/06/2015. There were four subsequent amendments. Current agreement is fourth amendment, start date 9/10/2018, end date 7/2/2019.



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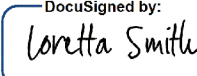
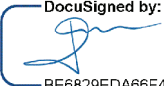
**C. REASONS FOR CONTRACT TERM EXTENSION**

Due to the unusually large number of recent property acquisitions and purchases contemplated by the County in support the County’s core mission, the need for this service is projected to extend beyond the current end date. An extension beyond the five years is required to allow due diligence to proceed while allowing time to prepare a new solicitation for appraisal services.

**D. RECOMMENDATION PLAN TO CURE ISSUE(S) (If applicable)**

Our recommendation is to extend the term of the current agreement until December 31, 2019. This will allow time to prepare for competitive procurement of a new agreement.

**SECTION VI**

Requesting Agency/Department Contracts Manager:	Print Name:	Loretta Smith	
	Signature:		5/5/2019
	Phone:	408-333-4030	
	Email:	loretta.smith@faf.sccgov.org	
Requesting Agency/Department Director:	Print Name:	Jeff Draper	
	Signature:		5/8/2019



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**SECTION VII**

**Decision and Required Steps Following Decision (to be completed by OCCM or Procurement)**

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

**SECTION VIII**

**Office of Countywide Contracting Management/Procurement Department Signature**

DocuSigned by:  62EEB3861ADB4FB... Theresa Therilus, DDOP	Date 6/7/2019
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