



**MINISTRY OF TECHNOLOGY, INNOVATION AND CITIZENS'
SERVICES
Request for Qualifications**

**Real Estate Appraisal Services
Request for Qualifications No. ON-002676**

This Request for Qualifications has been posted to augment the List of Qualified Firms originally established by Ministry of Technology, Innovation and Citizens' Services Request for Qualifications ON-002676 which was issued on May 26, 2015. Qualified Firms that are currently on the List of Qualified Firms do not need to provide a Response to this RFQ.

Issue date:
September 23, 2016

Closing location:

COURIER:
Ministry of Technology, Innovation and Citizens' Services 4000 Seymour Place, W109 Victoria, B.C. V8W 9V1 Attention: Elena Lawson

Closing date and time:

**A. One (1) complete copy of each Response must be received before 2:00 PM Pacific Time on
October 7, 2016.**

OR

B. If electronic delivery on BC Bid is the delivery method selected, one complete electronic Response must be received before 2:00 PM Pacific Time on **October 7, 2016 in accordance with BC Bid instructions. Only pre-authorized e-bidders registered on BC Bid can submit an electronic Response.**

Contact person:

Elena Lawson, Project Administrator
(250) 812-3180
Elena.Lawson@gov.bc.ca

Table of Contents

1.	OVERVIEW OF THE REQUIREMENT	4
2.	BACKGROUND.....	4
3.	REQUEST FOR QUALIFICATIONS DEFINITIONS	5
4.	REQUEST FOR QUALIFICATIONS	6
4.1.	Enquiries	6
4.2.	Closing Date.....	6
4.3.	Qualifications Review Committee.....	7
4.4.	Review and Selection.....	7
4.5.	Signed Responses.....	7
4.6.	Changes to Response Wording	7
4.7.	Respondent’s Expenses.....	7
4.8.	Acceptance of Responses.....	7
4.9.	Definition of Contract	8
4.10.	List of Qualified Suppliers Not Binding.....	8
4.11.	Modification of Terms	8
4.12.	Ownership of Responses.....	8
4.13.	Confidentiality of Information.....	8
4.14.	Collection and Use of Personal Information.....	8
4.15.	Additional Information on the RFQ.....	9
4.16.	Debriefing	9
4.17.	Form of Contract.....	9
4.18.	Conflict of Interest	9
4.19.	Public announcement and Promotion	9
5.	SERVICES	9
5.1.	General Appraisal Services.....	10
5.2.	Specialized Appraisal Services	10
5.3.	Service Areas and Regions	11
5.4.	Insurance	11
5.5.	Pricing	13
5.6.	Security Clearance	13
5.7.	Security and Confidentiality	13
5.8.	Location and Facilities	14
6.	USE OF LIST	14
6.1.	Guidelines	14
7.	QUALIFICATIONS REVIEW CRITERIA	18
7.1.	Mandatory Criteria.....	18
7.2.	Desirable Criteria and Qualifications Review Stages.....	18
8.	RESPONSE DETAILS.....	20

List of Appendices

APPENDIX A	RESPONSE COVERING LETTER
APPENDIX B	RESPONDENT QUALIFICATION SUMMARY
APPENDIX C	APPRAISER INFORMATION FORM
APPENDIX D	MAP OF PROVINCIAL GEOGRAPHICAL AREAS

1. Overview of the Requirement

The purpose of this Request for Qualifications (RFQ) is to qualify Appraisers to provide real estate appraisal services in all regions of the Province of British Columbia.

Based on the review of the RFQ Responses the Province intends to establish Lists of Qualified Suppliers who, on an “as, if and when requested” basis, may be contacted directly, or asked to compete, to enter into Contract(s) for provision of the services described in Section 5.

The Lists of Qualified Suppliers established as a result of this RFQ may be used by the Province and Public Sector Entities. Individual ministries of the Province and individual Public Sector Entities will be responsible for their use of the Lists and for their Contracts resulting from it. Purchasers have no obligation to enter into a Contract with any one or more Qualified Suppliers; or invite any one or more Qualified Suppliers to participate in competitive processes for a Contract.

2. Background

The Real Property Division (RPD) of the Ministry of Technology, Innovation and Citizens’ Services (MTICS) provides everything needed to design, set up and manage a workplace including management of a real estate portfolio, office space, furniture, computers, printers, telephones, tools for telecommuting and mobile work, workplace project management, special-purpose facilities and client services. Our client base includes ministries (mandated) as well as voluntary customers (broader public sector).

The Minister of Technology, Innovation and Citizens’ Services is authorized under the [*Public Agency Accommodation Act*](#) to provide a broad suite of real estate services to public agencies. RPD is responsible for carrying out these services on behalf of Shared Services BC (SSBC), a division of MTICS. RPD serves the needs of approximately 33,000 public servants in the British Columbia Public Service and many more in the broader public sector. Our real estate portfolio has 17 million square feet of office space, including 9.6 million in approximately 660 owned buildings and 7.4 million in leased buildings. In addition, we manage special-purpose facilities such as courthouses and correctional centres.

The Real Property Division optimizes utilization of the government's real estate portfolio, efficiently manages and maintains government-owned properties on behalf of the Province, buys and sells properties on behalf of government and provides real estate advice to other public sector organizations as requested. RPD also promotes the best possible workplace solutions and value for its clients and undertakes emergency preparedness and response.

3. Request for Qualifications Definitions

Throughout this RFQ, the following definitions will be used:

- a) “AACI” means Appraisal Institute of Canada designation Accredited Appraiser Canadian Institute;
- b) “AIC” means Appraisal Institute of Canada;
- c) “Appraiser” means a person nominated by a Respondent to be qualified in one or more Service Areas;
- d) “BC Bid” means the electronic tendering service maintained by the Province;
- e) “BC Bid Website” means the website maintained by BC Bid at www.bcbid.ca, or any replacement website;
- f) “Business Day” means a day, other than a Saturday or Sunday, on which Provincial government offices are open for normal business in British Columbia;
- g) “Contract” means a written contract executed by a Purchaser and a Qualified Supplier;
- h) “Contractor” means a Qualified Supplier with a Contract;
- i) “CRA” means Appraisal Institute of Canada designation Canadian Residential Appraiser;
- j) “List of Qualified Suppliers” or “List” means a list of names of Qualified Suppliers, and in the case where the Qualified Supplier is a company, includes the names of their Appraisers, who possess the qualifications described in this RFQ and that have satisfied any conditions set by the Province for being added to and staying on that list;
- k) “MRICS” means Member of the Royal Institution of Chartered Surveyors;
- l) “must”, or “mandatory” means a requirement that must be met in order for a Response to receive consideration;
- m) “Province” means Her Majesty the Queen in Right of the Province of British Columbia as represented by any minister;
- n) “Public Sector Entity” means
 - (a) a government organization as defined in the *Procurement Services Act*,
 - (b) a local public body as defined in the *Procurement Services Act*, or
 - (c) a public agency as defined in the *Public Agency Accommodation Act*;
- o) “Purchaser” means the Province or a Public Sector Entity;
- p) “Qualified Supplier” means a Respondent who is either an individual Appraiser, or who is a company having one or more Appraisers, possessing the qualifications in a Service Area described in this RFQ that has satisfied any conditions set by the Province for being added to, and staying on, the List of Qualified Suppliers in that Service Area;
- q) “Respondent” means an individual or a company that submits, or intends to submit, a Response ;
- r) “Response” means a statement of qualifications for an Appraiser submitted in reply to this RFQ;

- s) “RFQ” or “Request for Qualifications” means the process described in this document;
- t) “Services” means the services described in a Contract;
- u) “Service Area” means a category of service described in this RFQ in respect of which a List will be established; and
- v) “should” or “desirable” means a requirement having a significant degree of importance to the objectives of this RFQ.

4. Request for Qualifications

4.1. Enquiries

All enquiries related to this RFQ are to be directed, in writing, to the contact person at the mailing address on the front cover of this RFQ. Information obtained from any other source is not official and should not be relied upon. Do not contact the Ministry/Public Sector Entity involved unless indicated as the contact person. Enquiries and answers may be recorded and distributed to all Respondents at the Province’s option.

4.2. Closing Date

One (1) complete hard copy Response plus one (1) electronic copy of the Response either in MSWord or PDF format and either on CD, DVD or USB media must be received before 2:00 PM, Pacific Time, on **October 7, 2016** at the address on the front cover of this RFQ. Responses must not be sent by facsimile or e-mail. Responses and their envelopes should be clearly marked with the name and address of the Respondent, the RFQ number, and the project or program title.

OR

One (1) complete electronic Response must be received in accordance with BC Bid instructions for e-bidding before 2:00 PM, Pacific Time, on **October 7, 2016**. Only pre-authorized e-bidders registered on BC Bid can submit electronic Responses.

E-bidding is a subscription service (currently \$150 per year) that allows subscribers to electronically respond to e-bid opportunities through BC Bid through the use of an e-bidding key, a non-transferrable electronic signature associated with the entity that has applied for it. The registration process for an e-bidding key involves submitting a form in addition to registering online, and normally takes at least two business days to complete. A registration guide is available under Downloadable Guides on the BC Bid homepage (<http://www.bcbid.gov.bc.ca/custom/BCBidRegistrationGuide20100708.pdf>).

For assistance, contact the BC Bid Help Desk at 250-387-7301 or bcbid@gov.bc.ca.

Respondents must choose **one delivery method only** and must submit a Response **either** in hard copy format **or** electronically through BC Bid.

Responses received after the date set out on the front cover of this RFQ will be dealt with under section 6.1.12.

4.3. Qualifications Review Committee

Review of Responses will be by a committee formed by the Province and may include employees and contractors of the Province.

4.4. Review and Selection

The qualifications review committee will check Responses against the mandatory criteria. Responses not meeting all mandatory criteria will be rejected without further consideration. Responses that do meet all the mandatory criteria will then be assessed and scored against the desirable criteria. Responses not passing all desirable criteria, or meeting a minimum score (if specified), in a category will not be further considered. The names of successful Respondents will be added to the Province's List of Qualified Suppliers.

4.5. Signed Responses

The Response must include a cover letter substantially similar to the cover letter set out in Appendix A and the cover letter must be signed by a person authorized to sign on behalf of the Respondent.

If the Response is submitted electronically on BC Bid, the Response must be submitted by a person authorized to submit the Response on BC Bid and to use the Respondent's e-bidding key as signature on behalf of the Respondent.

4.6. Changes to Response Wording

The Respondent will not change the wording of its Response after the closing date and time specified on the front cover of this RFQ, and no words or comments will be added to the Response unless requested by the Province for purposes of clarification.

4.7. Respondent's Expenses

Respondents are solely responsible for their own expenses in preparing a Response and for subsequent negotiations with the Province, if any. The Province will not be liable to any Respondent for any claims, whether for costs or damages incurred by the Respondent in preparing the Response, loss of anticipated profit in connection with any final Contract, or any other matter whatsoever.

4.8. Acceptance of Responses

This RFQ is not an agreement to purchase services. The Province is not bound to enter into a Contract with any Qualified Supplier. Responses will be assessed in light of the qualification review criteria. The Province will be under no obligation to receive further information, whether written or oral, from any Respondent.

4.9. Definition of Contract

Notice in writing to a Respondent that it has been identified as a Qualified Supplier will neither constitute a Contract nor give the Respondent any legal or equitable rights or privileges relative to the service requirements set out in this RFQ. Only if a Qualified Supplier and a Purchaser enter into a subsequent full written Contract will a Respondent acquire any legal or equitable rights or privileges.

4.10. List of Qualified Suppliers Not Binding

A Qualified Supplier may withdraw its name from the List of Qualified Suppliers by notifying the Province in writing. The Province may withdraw a name of a Qualified Supplier from the List of Qualified Suppliers by notifying that Qualified Supplier in writing.

4.11. Modification of Terms

The Province reserves the right to modify the terms of this RFQ at any time in its sole discretion. This includes the right to cancel this RFQ or the List of Qualified Suppliers at any time without entering into a Contract.

4.12. Ownership of Responses

All documents, including Responses, submitted to the Province become the property of the Province. They will be received and held in confidence by the Province, subject to the provisions of the *Freedom of Information and Protection of Privacy Act*.

4.13. Confidentiality of Information

Information pertaining to the Province obtained by the Respondent as a result of participation in this RFQ is confidential and must not be disclosed without written authorization from the Province.

4.14. Collection and Use of Personal Information

Respondents are solely responsible for familiarizing themselves, and ensuring that they comply, with the laws applicable to the collection and dissemination of information, including resumes and other personal information concerning employees and employees of any subcontractors. If this RFQ requires Respondents to provide the Province with personal information of employees who have been included as resources in response to this RFQ, Respondents will ensure that they have obtained written consent from each of those employees before forwarding such personal information to the Province. Such written consents are to specify that the personal information may be forwarded to the Province for the purposes of responding to this RFQ and used by the Province and Public Sector Entities for the purposes set out in the RFQ. The Province may, at any time, request the original consents or copies of the original consents from Respondents, and upon such request being made, Respondents will immediately supply such originals or copies to the Province.

4.15. Additional Information on the RFQ

All subsequent information regarding this RFQ, including changes made to this document, will be posted on the BC Bid Website. It is the sole responsibility of the Respondent to check for amendments and additional information on the BC Bid Website.

4.16. Debriefing

The Province will offer a debriefing to Respondents who did not make the List of Qualified Suppliers, on request, at a mutually agreeable time.

4.17. Form of Contract

Any Contract between the Province and a Qualified Supplier will be substantially similar to the terms and conditions of the Province's General Service Agreement, a copy of which is available on the Internet at: http://www.pss.gov.bc.ca/psb/gsa/gsa_index.html.

The terms and conditions of any Contract between a Public Sector Entity and a Qualified Supplier may vary but are anticipated to be similar to the Province's General Service Agreement.

4.18. Conflict of Interest

Responses will not be evaluated if the Respondent's current or past corporate or other interests may, in the Province's sole discretion, give rise to an actual or potential conflict of interest. Each Respondent, by submitting a Response, warrants that to the best of its knowledge and belief no such actual or potential conflict of interest exists.

4.19. Public announcement and Promotion

Any public announcement relating to a Contract entered into with a Qualified Supplier will be arranged by the Purchaser and, if such consultation is reasonably practicable, after consultation with the successful Qualified Supplier.

A successful Qualified Supplier of this RFQ, or of a subsequent Contract leading from this RFQ, will not, without the prior written approval of the Purchaser, refer for promotional purposes to the Purchaser being a customer of the Qualified Supplier or the Purchaser having entered into a Contract for appraisal services with that Qualified Supplier.

5. Services

Purchasers may require Appraisers to deliver the General Appraisal Services or Specialized Appraisal Services identified in Sections 5.1 and 5.2

All General Appraisal Services and Specialized Appraisal Services will be delivered in accordance with the Appraisal Institute of Canada's Canadian Uniform Standards of Professional Appraisal Practice.

The Appraiser may involve other competent individuals, including sub-contractors, in the delivery of the services so long as the Appraiser oversees, reviews and co-signs the report to be delivered to the Purchaser under the Contract.

5.1. General Appraisal Services

General Appraisal Services will be delivered by (or overseen, reviewed, and co-signed, by) Appraisers who:

- 1.) are in good standing with, and are fully accredited (either CRA or AACI) by, the Appraisal Institute of Canada and have held that designation for 5+ years;
- 2.) have worked as a fee appraiser (as defined by the AIC) for 5+ years; and
- 3.) work with full autonomy i.e. do not require review, oversight nor a co-signor on any appraisal report that he or she produces.

General Appraisal Services include appraisals and analysis of or for:

- (a) Appraisals-Residential;
- (b) Appraisals-Commercial;
- (c) Appraisals – Industrial;
- (d) Appraisals – Office;
- (e) Preparation of Proformas / Discounted Cash Flow (“DCF”);
- (f) Real Estate Advice and Consultation;
- (g) Real Estate and Community Market Studies;
- (h) Feasibility analysis;
- (i) Highest & Best Use Analysis;
- (j) Site Search/Analysis;
- (k) Appraisals and analyses for partial acquisitions and for interests in land other than fee simple;
- (l) Expropriations;
- (m) Property tax review and recommendations;
- (n) Act as a Property Tax agent for Property Assessment Review Panel (“PARP”) or Property Assessment Appeal Board (“PAAB”);
- (o) Land Residual Analysis;
- (p) Other appraisal services;
- (q) Litigation;
- (r) Expert Witness in legal proceedings;
- (s) Arbitration; and
- (t) Estimate of Market Rental Value.

5.2. Specialized Appraisal Services

Specialized Appraisal Services will be delivered by (or overseen, reviewed, and co-signed, by) Appraisers who:

- 1.) are in good standing with, and are fully accredited (either CRA or AACI) by, the Appraisal Institute of Canada and have held that designation for 10+ years;
- 2.) have worked as a fee appraiser (as defined by the AIC) for 10+ years; and

- 3.) work with full autonomy i.e. do not require review, oversight nor a co-signor on any appraisal report that he or she produces.

Specialized Appraisal Services include appraisals and analysis of or for:

- (a) First Nation Reserve land appraisals;
- (b) Past Use Studies;
- (c) V Day appraisals;
- (d) Retrospective appraisals;
- (e) Absorption analysis;
- (f) Water lot and foreshore appraisals;
- (g) Linear corridor appraisals;
- (h) Rural and Forestry land appraisals;
- (i) Heritage building;
- (j) Utility plants;
- (k) laboratories; and
- (l) Agricultural Appraisals.

5.3. Service Areas and Regions

General Appraisal Services (Sections 5.1) and Specialized Appraisal Services (Section 5.2) are each a Service Area. Separate Lists of Qualified Suppliers will be established for each Service Area for each of the following regions of the province:

1. South Vancouver Island;
2. Central Vancouver Island;
3. North Vancouver Island;
4. Sunshine Coast/Howe Sound;
5. Lower Mainland;
6. Fraser Valley;
7. Cariboo;
8. Thomson;
9. Okanagan;
10. Kootenay;
11. North/South Peace;
12. Northcoast/Skeena;
13. Stikine.

Appendix D displays the approximate geographic boundaries of each region.

Appraisers may apply for one, the other, or both Service Areas based on the services they have identified in Part D of Appendix C.

An Appraiser who applies for both the General Appraisal Services and the Specialized Appraisal Services Service Areas may be qualified in one, the other, both, or neither of the Service Areas based on the Province's evaluations.

5.4. Insurance

The following subsections describe the insurance requirements related to Contracts resulting from use of the Lists.

5.4.1. Contracts with the Province

The Contractor will, without limiting the Contractor's obligations or liabilities and at the Contractor's own expense, purchase and maintain throughout the term of the Contract the following insurances with insurers licensed in Canada in forms and amounts acceptable to the Province:

- (a) Commercial General Liability in an amount not less than \$2,000,000.00 inclusive per occurrence against bodily injury, personal injury and property damage and including liability assumed under this Agreement and this insurance will
 - (i) include the Province as an additional insured,
 - (ii) be endorsed to provide the Province with 30 days advance written notice of cancellation or material change, and
 - (iii) include a cross liability clause.
- (b) Professional Liability in an amount not less than \$2,000,000.00 per claim, insuring the Contractor's liability resulting from errors and omissions in the performance of professional services under the Contract and this insurance will be endorsed to provide the Province 30 days advance written notice of cancellation.
- (c) Automobile Liability on all vehicles owned, operated or licensed by the Contractor in an amount not less than \$2,000,000 per occurrence, and where applicable the Contractor may show evidence of this insurance using an ICBC Confirmation of Insurance Coverage (APV-47) form in place of the requirement for the BC Certificate of Insurance.

All insurance described in Section 5.4.1 will:

- (a) be primary; and
- (b) not require the sharing of any loss by any insurer of the Province.

The Contractor will provide the Province with evidence of all required insurance as follows:

- (a) within 10 Business Days of commencement of the Services, the Contractor will provide to the Province evidence of all required insurance in the form of a completed Province of British Columbia Certificate of Insurance;
- (b) if any required insurance policy expires before the end of the Term, the Contractor will provide to the Province within 10 Business Days of the policy's expiration, evidence of a new or renewal policy meeting the requirements of the expired insurance in the form of a completed Province of British Columbia Certificate of Insurance; and

- (c) despite paragraph (a) or (b) above, if requested by the Province at any time, the Contractor will provide to the Province certified copies of the required insurance policies.

The Contractor will obtain, maintain and pay for any additional insurance which the Contractor is required by law to carry, or which the Contractor considers necessary to cover risks not otherwise covered by insurance specified in Section 5.4.1 in the Contractor's sole discretion.

Notwithstanding the foregoing, the Province may require other or additional insurance provisions to be contained in a Contract.

5.4.2. Contracts with Public Sector Entities

The insurance requirements of Contracts between Public Sector Entities and Qualified Suppliers are anticipated to be similar to those described in Section 5.4.1, but the Province makes no representation to Respondents regarding the requirements of Public Sector Entities.

5.5. Pricing

Respondents are requested to provide the Appraiser's hourly rate in Part C of Appendix C. Although the hourly rate will not be evaluated when determining whether the Appraiser will be included on a List, Purchasers may use the Appraiser's hourly rate as criteria for selecting Qualified Suppliers for opportunities.

5.6. Security Clearance

A Purchaser may, in its sole discretion, require security clearances, in a form satisfactory to the Purchaser, from the Appraiser before entering into a Contract. Any costs associated with obtaining such security clearances will be borne by the Qualified Supplier under the Contract.

5.7. Security and Confidentiality

The Contractor will make reasonable security arrangements to protect material provided by a Purchaser under a Contract from unauthorized access, collection, use, disclosure, alteration or disposal. Notwithstanding the foregoing, a Purchaser may require other or additional security arrangements to be contained in a Contract.

The Contractor will treat as confidential all information in the material and all other information accessed or obtained by the Contractor (whether verbally, electronically or otherwise) as a result of this RFQ or subsequent RFP, and not permit its disclosure or use without the Province's prior written consent except:

- a. as required to perform the Appraiser's obligations under this Agreement or to comply with applicable laws; or

- b. if it is information that is generally known to the public other than as a result of a breach of this Agreement.

5.8. Location and Facilities

Purchasers may require Appraisers to work on site from time to time, but Appraisers should be prepared to work at their own off-site work location and are required to be able to be contacted by telephone, fax and e-mail. Appraisers should have access to standard office automation tools (i.e., e-mail, MS Word, MS Excel, and MS PowerPoint). MS Project may be required for certain assignments.

When required to work on-site by the Province, Appraisers may have access to a workspace that has a desk, phone, and computer with LAN/WAN and Internet connectivity, as well as ministry standard office automation tools as necessary. Oracle CASE will be provided as required.

6. Use of List

6.1. Guidelines

The guidelines set out in this Section 6 regarding the use of the List of Qualified Suppliers are subject to change from time to time as the Province may deem necessary, without notice to the Qualified Suppliers on the List.

6.1.1 The List of Qualified Suppliers will be in effect until March 31, 2020 and, at the sole discretion of the Province, may be extended for up to two one-year periods.

6.1.2 Purchasers may, in their sole discretion, from time to time, use the List of Qualified Suppliers in connection with projects or assignments. The criteria for selecting Qualified Suppliers for each project or task will vary, depending upon the requirements of the applicable project or task and could involve requiring a Appraiser to have a certain demonstrated experience and proficiency level in one or more Service Areas depending on the specific requirements of the project or assignment. As part of this process, Purchasers may request past work examples, references or any other reasonable example as indication of an Appraiser's expertise in a Service Area.

6.1.3 Any Contracts entered into with a Qualified Supplier will be:

- a) between the Purchaser and the individual Appraiser where the Qualified Supplier is the individual Appraiser, and
- b) between the Purchaser and a company and specifying the individual Appraiser(s) to be engaged where the Qualified Supplier is a Respondent company.

6.1.4 Qualified Suppliers may be contacted on an "as, if and when requested" basis and may be contacted directly or asked to compete on opportunities for the provision of services in accordance with the selection method set out in paragraph 6.1.5 or as revised by the Province and communicated to all Qualified Suppliers from time to time. If a Qualified Supplier's requested Appraiser is unavailable for a

contemplated project or assignment, the Qualified Supplier may propose a substitute resource to the Province for evaluation and consideration.

6.1.5 Purchasers may select a Qualified Supplier from the List using one or more of the following selection methods:

- a) If the estimated Contract value is less than \$25,000 and if the Purchaser determines in its sole discretion that it would not be reasonable and cost-effective to compete the opportunity, the Purchaser may directly invite a Qualified Supplier to provide a quotation based on Appraiser availability and on specified requirements (e.g., deliverables, milestones, term etc.) of the project or assignment with the intent to enter into Contract negotiations with that Qualified Supplier;
- b) If the estimated Contract value is \$25,000 or more and less than \$75,000, or is less than \$25,000 and the Purchaser has determined that it will not proceed under paragraph (a) above, the Purchaser may directly invite a Qualified Supplier to provide a quotation based on Appraiser availability and on specified requirements (e.g., deliverables, milestones, term, etc.) of the project or assignment with the intent to enter into Contract negotiations with that Qualified Supplier if it can be verified by the Purchaser that only one Qualified Supplier has a Appraiser that:
 - i. is available to undertake the project or assignment; or,
 - ii. has the necessary qualifications to carry out the project or assignment based on the Purchaser's specific assessment of the Appraiser qualifications.
- c) If the estimated Contract value is \$25,000 or more and less than \$75,000, or is less than \$25,000 and the Purchaser has determined that it will not proceed under paragraph (a) above, and more than one Qualified Supplier has an Appraiser available who has the necessary qualifications to carry out the project or assignment based on the Purchaser's specific assessment of the Appraiser qualifications, the Purchaser may, in its sole discretion, use a competitive or other selection process between a minimum of three (if available) such Qualified Suppliers that evaluates each Qualified Supplier's available Appraiser, proposed approach, pricing, or other elements required for the project or assignment. The Purchaser may in its sole discretion consider other Qualified Suppliers' available Appraisers that, in the Purchaser's sole opinion, meet the Purchaser's qualification criteria for the project or assignment (e.g., specialization, experience level, etc.).
- d) If the estimated Contract value is \$75,000 or more, and more than one Qualified Supplier has an Appraiser available who has the necessary qualifications to carry out the project or assignment based on the Purchaser's specific assessment of the Appraiser qualifications, the Purchaser will invite all such Qualified Suppliers to compete for the project or assignment.
- e) Notwithstanding subparagraphs a), b), c), and d), the Purchasers may directly negotiate a contract with a Qualified Supplier where one of the following exceptional conditions applies:

- i. only one available Appraiser is qualified to provide the services;
- ii. an unforeseeable emergency exists and the services could not be obtained in time by means of a competitive process;
- iii. a competitive process would interfere with the Purchaser's ability to maintain security or order or to protect human, animal or plant life or health; or
- iv. the acquisition is of a confidential or privileged nature and disclosure through an open bidding process could reasonably be expected to compromise government confidentiality, cause economic disruption or be contrary to the public interest.

6.1.6 Qualified Suppliers will immediately, during the period that the List is in effect, advise the Province of any material changes to the information contained in their Response.

6.1.7 The Province has the sole discretion to remove a Qualified Supplier from the List of Qualified Suppliers for unsatisfactory performance by a Qualified Supplier in a Contract or for failing to meet the requirements for staying on the List of Qualified Suppliers as set out in this RFQ or as may be communicated by the Province from time to time.

6.1.8 Purchasers have no obligation to:

- a) inquire as to the availability of a substitute Appraiser when advised by a Qualified Supplier that the Appraiser named on the List is not available for a particular project;
- b) evaluate or accept any substitute Appraiser proposed by a Qualified Supplier;
- c) enter into a Contract with any one or more Qualified Suppliers; or
- d) invite any one or more Qualified Suppliers to participate in competitive processes for a Contract.

6.1.9 Purchasers reserve the right, in their sole discretion, to:

- a) employ open competitions that include suppliers external to the List of Qualified Suppliers; or
- b) otherwise engage suppliers external to the List of Qualified Suppliers in connection with any project required by the Purchaser.

- 6.1.10** The Province reserves the right, in its sole discretion, to at any time, cancel, extend, expand or make a call to the market-place to renew the List of Qualified Suppliers.
- 6.1.11** Purchaser may not necessarily select the Qualified Supplier offering the lowest rates, and may also review the qualifications, references, past work or other criteria required for a specific project.
- 6.1.12** Once established, the List of Qualified Suppliers will be in effect from the start date stated on the List and will remain in effect until the date set out in section 6.1.1, subject to extensions or cancellations as contemplated in this RFQ, and subject to the following refresh procedures:
- (a) at any time during the term of the List, the Province reserves the right to consider subsequent requests for inclusion on the List, upon submission of a Response by an Appraiser or a firm, which will be evaluated in the same manner as set out in this RFQ, and to add to the List any such subsequently qualifying Respondents; and
 - (b) on at least an annual basis, or at any time at its sole discretion, the Province reserves the right to invite new Respondents to submit Responses pursuant to a refresh of this RFQ No. ON-002676 and to add such new Respondents as meet the qualifications to the List.

For tracking purposes, a refresh RFQ will reference the same RFQ number as RFQ No. ON-002676 and the month and year in which the refresh RFQ was issued.

- 6.1.13** Appraisers that have already been identified as a Qualified Supplier as a result of this RFQ or a subsequent RFQ refresh will remain as Qualified Suppliers on the List for the Service Areas in which they have been qualified, so long as they continue to satisfy the conditions for remaining on the List.
- 6.1.14** If an Appraiser wishes to be qualified in a new Service Area, the Appraiser will need to submit a new response in relation to that new Service Area to be considered.
- 6.1.15** In the event that an Appraiser who was qualified through this RFQ leaves the Qualified Supplier (i.e. leaves the firm that submitted the Response to this RFQ), the Province reserves the right to, at any time, consider a request for that Appraiser to be included on the List as, or under, a new Qualified Supplier.

7. Qualifications Review Criteria

7.1. Mandatory Criteria

The following are mandatory requirements. Responses not clearly demonstrating that they meet them will receive no further consideration during the evaluation process.

Mandatory Criteria
a) The Response must be received at the closing location or submitted on BC Bid by the specified closing date and time.
b) The Response must be in English and must not be sent by facsimile or email.
c) If delivery by hard copy is selected , one (1) hard copy of the Response must be submitted plus one (1) electronic copy of the Response must be submitted, either in MSWord or PDF format and either on CD, DVD or USB media. If delivery by BC Bid is selected , one complete electronic Response must be submitted electronically on BC Bid in accordance with BC Bid instructions.

7.2. Desirable Criteria and Qualifications Review Stages

Stage 1

Responses will be checked for compliance with the Mandatory Criteria. Responses that do not meet the mandatory requirements will receive no further consideration.

Stage 2

All Appraisers nominated in Responses meeting the mandatory requirements and who have identified in Part D of Appendix C that they would like to be considered for General Appraisal Services will be further assessed against the following desirable criteria:

Desirable Criteria	Evaluation Method
The Appraiser is in good standing with, and is fully accredited (either CRA or AACI) by, the Appraisal Institute of Canada and has held that designation for 5+ years	Pass/Fail
The Appraiser has worked as a fee appraiser (as defined by the AIC) for 5+ years	Pass/Fail
The Appraiser works with full autonomy i.e. does not require review, oversight nor a co-signor on any appraisal report that he or she produces	Pass/Fail
The Appraiser has identified two projects/assignments the Appraiser has been engaged on.	Pass/Fail

The Appraiser has identified a client reference and provided contact information for both projects/assignments identified by the Appraiser	Pass/Fail
The Appraiser has clearly demonstrated his or her expertise in this Service Area. The Appraiser will pass this criterion if: 1.) The assignments described are applicable to the services for this Service Area as described in this RFQ; 2.) The assignments described were delivered after May 26, 2000; and 3.) The Appraiser directly delivered, or oversaw and co-signed, the work described in the assignment.	Pass/Fail

Those Appraisers who have passed all criteria in the table above, and who have identified in Part D of Appendix C that they would like to be considered for General Appraisal Services, will be included on the General Appraisal Services List of Qualified Suppliers for the regions identified in that Appraiser's Appendix C.

Stage 3

All Appraisers nominated in Responses meeting the mandatory requirements and who have identified in Part D of Appendix C that they would like to be considered for Specialized Appraisal Services will be further assessed against the following desirable criteria:

Desirable Criteria	Evaluation Method
The Appraiser is in good standing with, and is fully accredited (either CRA or AACI) by, the Appraisal Institute of Canada and has held that designation for 10+ years	Pass/Fail
The Appraiser has worked as a fee appraiser (as defined by the AIC) for 10+ years	Pass/Fail
The Appraiser works with full autonomy i.e. does not require review, oversight nor a co-signor on any appraisal report that he or she produces	Pass/Fail
The Appraiser has identified two projects/assignments the Appraiser has been engaged on.	Pass/Fail
At least one of the projects/assignments included delivery of at least one service listed under Specialized Appraisal Services	Pass/Fail

The Appraiser has identified a client reference and provided contact information for both projects/assignments identified by the Appraiser	Pass/Fail
The Appraiser has clearly demonstrated his or her expertise in this Service Area. The Appraiser will pass this criterion if: 1.) The assignments described are applicable to the services for this Service Area as described in this RFQ; 2.) The assignments described were delivered after May 26, 2000; and 3.) The Appraiser directly delivered, or oversaw and co-signed, the work described in the assignment.	Pass/Fail

Those Appraisers who have passed all criteria in the table above, and who have identified in Part D of Appendix C that they would like to be considered for Specialized Appraisal Services, will be included on the General Appraisal Services List of Qualified Suppliers for the regions identified in that Appraiser's Appendix C.

Stage 4

Reference checks may be done by the Province during the qualifications review and the term of the Lists to confirm any submitted Appendix C information about Appraisers. The Province reserves the right to contact references other than those provided by the Respondent and to confirm the Appraisers' standing with the Appraisal Institute of Canada and the number of years designations have been held for.

If any of the references or confirmations are unsatisfactory to the Province, the Appraiser may be excluded or removed from a List of Qualified Suppliers in the Province's sole discretion.

Stage 5

All Respondents will be notified of their status on the List of Qualified Suppliers.

8. Response Details

- 8.1** Responses are to be submitted in the following format and sequence to ensure that they receive full consideration during evaluations and that the evaluations themselves may be handled in an efficient and consistent manner. All pages should be consecutively numbered.

The Response should include:

- a) The Response covering letter set out in Appendix A;
- b) A completed Respondent Qualification Summary, in substantially the same form as Appendix B;
- b) A completed form, in substantially the same form as Appendix C, **for each Appraiser;**
- e) A résumé (maximum two pages, please) **for each Appraiser**, containing information on the Appraiser's education, relevant employment history including positions held and their duration, relevant skills and experience and professional designations and affiliations.

Electronic versions of Appendix B and Appendix C should be in MS Word format.

- 8.2** If delivery is by hard copy, the number of Response copies specified in the Mandatory Criteria must be submitted.

Appendix A – Response Covering Letter

Letterhead or Respondent's name and address

Date:

Ministry of Technology, Innovation and Citizens' Services
4000 Seymour Place, W109
Victoria, B.C. V8W 9V1

Attention: **Elena Lawson, Project Administrator**

Subject: **List of Qualified Suppliers
Request for Qualifications No. ON-002676, including any
amendments or additions (the "Request For Qualifications")**

NOTE: amendments and additions will be posted to the BC Bid website at www.bcbid.ca It is the Respondent's sole responsibility to check for amendments and additional information. Delete this from your letter when read.

The enclosed Response is submitted in response to the above-referenced Request for Qualifications.

We have carefully read and examined the Request for Qualifications and have conducted such other investigations as were prudent and reasonable in preparing the Response. We are authorized to submit this Response on behalf of the Respondent.

Yours truly,

Signature

Name: _____

Title: _____

Telephone Number: _____

e-mail address: _____

Legal name of Respondent: _____

Date: _____

Appendix B – Respondent Qualification Summary

Respondents should include **one** completed copy of Appendix B in their response.

Respondent Contact Information	
Respondent's Legal Name:	
Respondent's Contact Person's Name and Title:	
Respondent's Contact Person's Address:	
Respondent's Contact Person's Phone:	
Respondent's Contact Person's Fax:	
Respondent's Contact Person's Email Address:	
Respondent's Contact Person's Mailing Address (if different from above):	

Respondent Information			
Years In Business			
Name and date of designation of all senior appraisers in Firm (add rows as needed)			
Senior Appraiser(s) Name	Designation	Date of Designation	Specialty(s) if Applicable
Response Times (in Business Days) to assign an Appraiser that has been named in this RFQ to an assignment.			

Note: A senior appraiser is an appraiser who:

- a. is in good standing with, and is fully accredited (either CRA or AACI) by, the Appraisal Institute of Canada and has held that designation for 5+ years;
- b. has worked as a fee appraiser (as defined by the AIC) for 5+ years; and
- c. works with full autonomy i.e. do not require review, oversight nor a co-signor on any appraisal report that he or she produces.

The appraisers listed in response to this section do not have to be appraisers nominated by the Respondent in response to this RFQ.

Appendix C – Appraiser’s Information Form.

A **separate** Appendix C should be submitted **for each Appraiser**. Parts A, B, C, D and E should be completed for each Appraiser.

Part A:

Appraiser Contact Information	
Appraiser’s Name:	
Address:	
Mailing Address (if different from above):	
Phone:	
Fax:	
Email Address:	

Part B:

Regions	
Please insert an "X" next to each region below for which the Appraiser would like to be considered and is able to deliver services in.	
Separate Lists of Qualified Suppliers will be created for each region; Appraisers should, therefore, identify all regions in which the Appraiser is able to deliver services.	
Example	X
1. South Vancouver Island;	
2. Central Vancouver Island;	
3. North Vancouver Island;	
4. Sunshine Coast/Howe Sound;	
5. Lower Mainland;	
6. Fraser Valley;	
7. Cariboo;	
8. Thomson;	
9. Okanagan;	
10. Kootenay;	
11. North/South Peace;	
12. Northcoast/Skeena;	
13. Stikine.	

Part C:

Appraiser Qualifications, Experience and Capabilities			
Mandatory Appraisal Designation			
Please indicate with an "X" which designations the Appraiser has and provide the year the designation was received.			
CRA		Date Designation Received	
AACI		Date Designation Received	
Other Real Estate Related Degrees & Designations			
Please describe below any other real estate related degrees & designations held by the Appraiser			
Real Estate Affiliations/Memberships			
Please describe below any real estate affiliations or memberships held by the Appraiser			
Years of Experience			
In the appropriate cells below please indicate the number of years the Appraiser has worked as a fee appraiser (as defined by the AIC) and the number of years the appraiser has been with the Respondent			
Total Number of Years in Business as a Fee Appraiser (as defined by the AIC)			
Years With Respondent			
Autonomy			
Appraisers are required to be able to work with full autonomy i.e. will not require review, oversight nor a co-signor on any appraisal report that he or she produces.			
Please insert an "X" next to the <u>one</u> true statement below.			
This Appraiser works with full autonomy			
This Appraiser does not work with full autonomy			
Hourly Rate			
Please identify the Appraiser's hourly rate below.			
Appraiser's Hourly Rate	\$		

Part D:

Service Areas: Services		
Please insert an "X" next to each appraisal service below for which the Appraiser would like to be considered.		
The Province will use the response to this Part D to determine which Service Area or Service Areas to consider the Appraiser for. Purchasers may use the services identified when determining which Appraisers may be appropriate for an opportunity.		
	Example	X
General Appraisal Services	Appraisals-Residential	
	Appraisals-Commercial	
	Appraisals – Industrial	
	Appraisals – Office	
	Preparation of Proformas / Discounted Cash Flow (“DCF”);	
	Real Estate Advice and Consultation	
	Real Estate and Community Market Studies	
	Feasibility analysis	
	Highest & Best Use Analysis	
	Site Search/Analysis	
	Appraisals and analyses for partial acquisitions and for interests in land other than fee simple;	
	Expropriations	
	Property tax review and recommendations	
	Act as a Property Tax agent for Property Assessment Review Panel (“PARP”) or Property Assessment Appeal Board (“PAAB”)	
	Land Residual Analysis	
	Other appraisal services	
	Litigation	
	Expert Witness in legal proceedings	
	Arbitration	
Estimate of Market Rental Value		
Specialized Appraisal Services	First Nation Reserve land appraisals	
	Past Use Studies	
	V Day appraisals	
	Retrospective appraisals	
	Absorption analysis	
	Water lot and foreshore appraisals	
	Linear corridor appraisals	
	Rural and Forestry land appraisals	
	Heritage buildings	
	Utility plants	
	Laboratories	
	Agricultural Appraisals	

Part E:

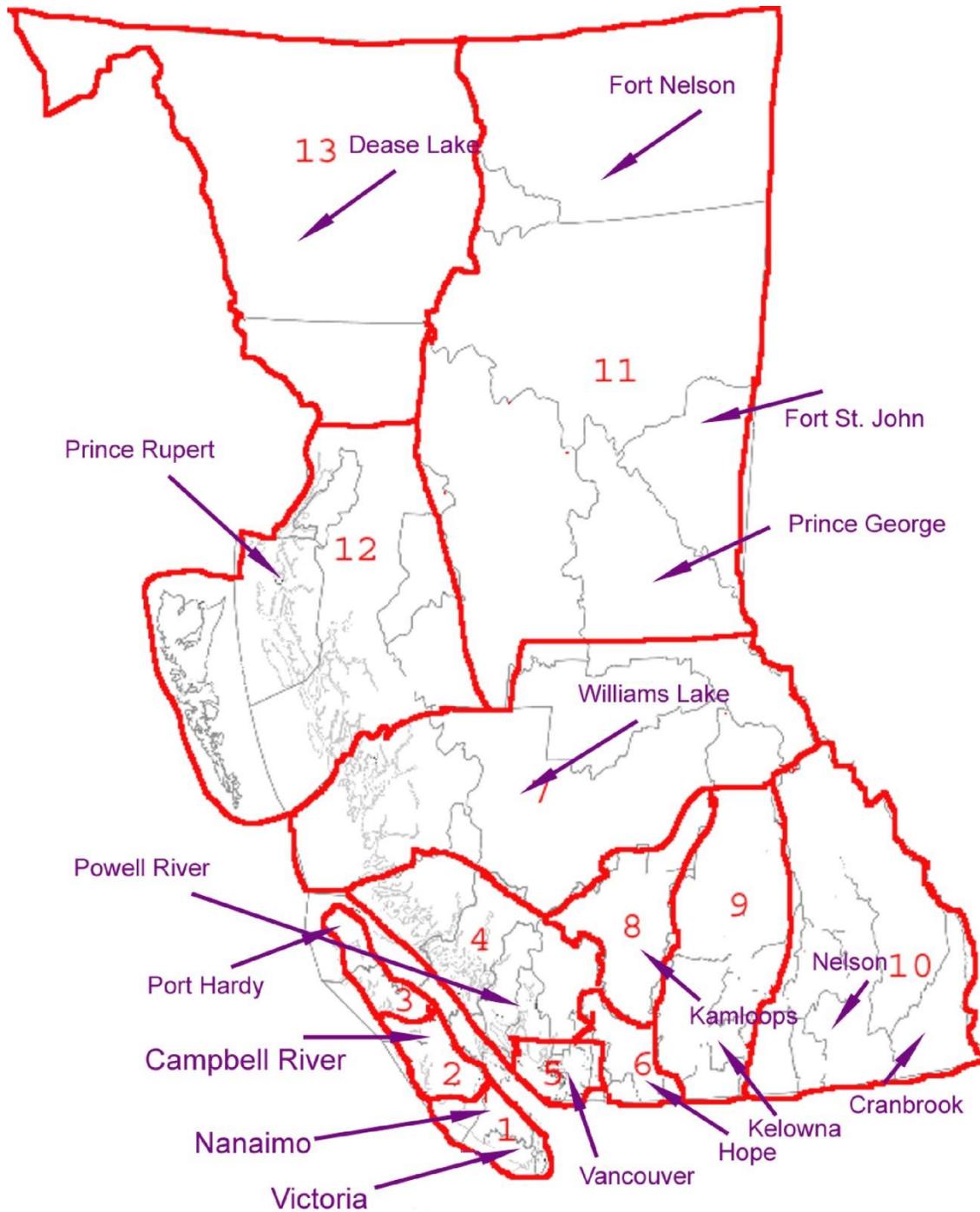
Please provide details about two projects or assignments after **May 26, 2000** that the Appraiser has been involved in that demonstrate the Appraiser's expertise.

If the Appraiser is applying for the Specialized Appraisal Services Service Area at least one of the projects or assignments needs to include delivering at least one of the services listed in that Service Area in Part D e.g. First Nation Reserve land, Water lot and foreshore appraisals, etc.

Project/Assignment 1		
Appraiser's Demonstrated Experience – Assignments/Projects.	Services Delivered	Client Reference(s)
<i>Provide specific details about a project/assignment the Appraiser was engaged on to clearly demonstrate the Appraiser's expertise in this Service Area. For example, indicate the time length of the assignment, details about its value and impact of the client organization, your role and accomplishments in the assignment etc.</i>	<i>Please list the services identified in Part D that the Appraiser delivered during this project or assignment. e.g. "Appraisals-Residential" and "Estimate of Market Rental Value"</i>	<i>Please provide:</i> - Client Name, - Client Contact Name and Title - Contact's telephone number - Contact's e-mail

Project/Assignment 2		
Appraiser's Demonstrated Experience – Assignments/Projects.	Services Delivered	Client Reference(s)
<i>Provide specific details about a project/assignment the Appraiser was engaged on to clearly demonstrate the Appraiser's expertise in this Service Area. For example, indicate the time length of the assignment, details about its value and impact of the client organization, your role and accomplishments in the assignment etc.</i>	<i>Please list the services identified in Part D that the Appraiser delivered during this project or assignment. e.g. "Appraisals-Residential" and "Estimate of Market Rental Value"</i>	<i>Please provide:</i> - Client Name, - Client Contact Name and Title - Contact's telephone number - Contact's e-mail

Appendix D – Map Of Provincial Geographical Areas



BC Map Legend

1. South Vancouver Island
2. Central Vancouver Island
3. North Vancouver Island
4. Sunshine Coast/Howe Sound
5. Lower Mainland
6. Fraser Valley
7. Cariboo
8. Thomson
9. Okanagan
10. Kootenay
11. North/South Peace
12. North Coast/Skeena
13. Stikine