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Contract Land Staff Proposal: RFP #23-4090-05

1 message

Rose Jarrett <rose.jarrett@contractlandstaff.com>

Wed, Sep 20, 2023 at 11:49 AM

To: "bids@burnetcountytexas.org" <bids@burnetcountytexas.org>

Hello,

My name is Rose Jarrett, and I'm the Proposal Coordinator for Contract Land Staff. I'm pleased to submit the attached Statement of Qualifications in response to RFP #23-4090-05: Right of Way Acquisition Services for the Wirtz Dam Road Project. Please let me know if you require anything else to consider our submission.

Thank you,

Rose Jarrett

Proposal Coordinator

Contract Land Staff, LLC

1575 E. River Road #201 | Tucson, AZ 85718



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9/20/2023

BURNET COUNTY, TEXAS RFP #23-4090-05

RIGHT OF WAY ACQUISITION SERVICES WIRTZ DAM ROAD PROJECT



PROPOSAL BY:

CONTRACT LAND STAFF
1705 CAPITAL OF TEXAS HWY #300
AUSTIN, TX 78746



PHOTOS COURTESY OF
INKS LAKE STATE PARK INSTAGRAM



1. COVER LETTER

September 20, 2023

Burnet County Auditor
ATTN: County Auditor/Purchasing Agent
133 East Jackson Street
Burnet, TX 78611

TO WHOM IT MAY CONCERN AT BURNET COUNTY,

Contract Land Staff, LLC (CLS), is pleased to submit this response to Burnet County's (the County's) Request for Proposal (RFP) for Right of Way (ROW) Acquisition Services on the Wirtz Dam Road Project. We appreciate the opportunity to present our credentials for your consideration, affirming our interest in and ability to perform the services required. We have carefully reviewed the RFP and thoroughly understand the scope of work detailed therein.

Founded in 1985, the CLS team has the proven expertise, substantial experience, established processes and procedures, modern technology, and staff to assist the County in successfully securing necessary property rights in the most expedient and cost-efficient manner. Over the last 38 years, we have become an industry leader by focusing on quality, teamwork, technology, training, and project planning. We will work diligently on your behalf, with a commitment to understanding the character and specific goals of your project. Our aim is to always bring open communication and resourcefulness to each task, enabling us to work closely with your staff to successfully execute all projects.

The team we have assembled brings myriad qualifications and applicable experience, having completed many projects in the state of Texas for Cities, Counties, and the Texas Department of Transportation (TxDOT). Our staff members also have the availability to complete the required scope for the County's contract. They are presented herein, with resumes attached. As your trusted consultant, CLS recognizes that our primary purposes are to perform compliant work, deliver innovative solutions, effectively manage the contract, and ensure follow-through on our team's commitments, while maintaining a high standard of ethics and professionalism.

Thank you for considering CLS!

Sincerely,

A handwritten signature in black ink, appearing to read "R. David Bell".

R. David Bell
Senior Vice President
850.206.3139
david.bell@contractlandstaff.com





2. ABILITY TO PERFORM SCOPE OF WORK

RIGHT OF WAY AND PROPERTY ACQUISITION

Our goal is to complete our work in a timely and technically correct manner, while treating the people and businesses impacted by the project respectfully and equitably. We understand that success in any acquisition assignment is contingent upon communicating technical data to people who can be fearful, angry and may possess limited knowledge of the complex process affecting their livelihoods, families and communities.

There is no "one size fits all" negotiation technique in ROW. Each landowner has their own level of understanding, past experiences and fears that need to be listened to and addressed. Gathering information is as important as giving information about your project. We bring our listening skills, and we search for solutions to all project issues along the way. It is imperative that we address the concerns of the property owners fairly while at the same time staying focused on the needs of our client's project. The benefits of this approach are cost effectiveness, reduction in project delays and an increase in the public's confidence.

One factor that differentiates our team from other ROW firms is the level of detailed, personalized effort we devote to our negotiations. We take the time required to build the property owner's trust in the acquisition process, which assists in the discovery of underlying issues that may prevent settlement. We have extensive experience in the following:

- » Property acquisition cost estimating
- » Public outreach
- » Administrative offer summaries
- » Project funding estimates
- » Easement & ROW acquisitions
- » Full & partial acquisitions
- » Property negotiations & exchanges
- » Property research & inventories
- » Policy & procedure development
- » Permitting & notification
- » Construction liaison & damage settlements
- » Title research, review, & clearing
- » Escrow coordination
- » Eminent domain litigation support
- » Appraisal coordination services

Appraisal and appraisal review services will be provided by subconsultants. We have worked closely with the most highly respected appraisal firms in our region, and we will recommend only those firms with the experience best suited for your project. Our subconsultants will complete appraisals and appraisal reviews that will meet the requirements of the Uniform Standards of Professional Appraisal Practices; the TxDOT Right of Way Manual; the Appraisal Report Guide; and the Federal Uniform Relocation Assistance and Real Property Acquisitions Policy Act (the Uniform Act) as defined in 49 Code of Federal Regulations (CFR) Part 24. Additionally, we only partner with State-certified appraisers.

RELOCATION ASSISTANCE

CLS provides comprehensive relocation assistance services to public and private sector clients. Whether with local, regional, State, and Federal public agencies; school districts; or for-profit and non-profit developers, our experience encompasses a varied assortment of projects and settings. We have broad relocation experience in the following:





- » Public outreach
- » Relocation budget estimates
- » Relocation plans
- » Replacement housing plans
- » Housing, commercial, & industrial surveys
- » Commercial & industrial relocations
- » Large-scale commercial relocation advisory services
- » Residential relocations (including permanent & temporary displacement)
- » Rent control compliance
- » Public & private mobile home closures
- » Tracking & management of payments to Last Resort Housing benefit recipients
- » Document translation
- » Section 8 relocations
- » Development reviews and updates
- » Agency relocation guidelines
- » Post-relocation audit representation

TRANSLATION SERVICES

It is estimated that more than 160 different languages are spoken in Texas alone. CLS's belief that all Texas landowners must be treated fairly and respectfully also includes clear communication. If translation and interpreting services are needed for verbal or written exchanges, we can deploy Spanish-speaking agents or partner with translation services to provide assistance.

WHAT SETS CLS APART?

Our proposed team features industry leaders who have multiple decades of experience working with a variety of clients, including **leading dozens of TxDOT projects**. We are all located in the Central Texas area, and as such, we are available to be on-site at a moment's notice. CLS has worked with each of the proposed consultants before on successful projects that met deadlines and exceeded expectations. As such, there is a rapport and **existing standards for communication among this team**.

Constant communication and updates utilizing Microsoft Teams, **our proprietary CLS software**, or the County's chosen platform will keep everyone informed about project creeps, fast-flowing issues, and unexpected budget concerns. As these issues arise, we will address them immediately with a solution in mind. We are all committed to the delivery and successful completion of the Wirtz Dam Road Project.

Furthermore, Burnet County can be confident that our proposed staff are **experts in all local, State, and Federal regulations** that might govern this project, depending on the funding type(s). Collectively, we have faced every hurdle imaginable in right of way acquisition and appraisal. When we put our heads together, there is nothing this project could throw our way that we won't be able to overcome.





3. APPROACH

CASH FLOW

CLS maintains strict policies and procedures related to accounts receivable and accounts payable. As soon as CLS receives an invoice from a subconsultant, the billings are confirmed by the appropriate operational staff, and that invoice is immediately entered into the accounting system (Deltek Vision). Remittance of a specific subcontractor billing to the client for payment is contingent upon the client's specified billing cycle: weekly, biweekly, monthly, etc. However, once in the accounting system, open invoices from subconsultants are reviewed weekly against actual payments received from clients during that week. Any payments received and matched against an open subconsultant invoice are then processed in that week's accounts payable disbursements, and a check is cut and sent back to the subconsultant.

WORKLOAD MANAGEMENT

Our decades of experience include many contracts with subconsultants who offer professionalism, knowledge, and a shared commitment to client satisfaction on the projects we serve.

Ninety percent of our projects require that we hire and manage subconsultants. We prefer this because it allows us to manage the time line and expectations for our clients. We have built excellent working relationships with a number of such firms and continue to work with them individually or jointly, depending on the project scope and schedule. **In teaming with the subcontractors we've chosen for the Wirtz Dam Road Project, we will meet and exceed the County's Disadvantaged Business Enterprise (DBE) requirement.**

CLS has developed a process for working with subconsultants to ensure that services

are provided on time and within budget. The process starts with a clear subconsultant agreement that includes project goals, a detailed scope of work, fee breakdown, and

contractual clauses from the client. Included in the agreed-upon scope of work are the main point of contact with the subcontractor and the roles and responsibilities of team members.

CLS communicates with our team of subconsultants through face-to-face meetings, Microsoft Teams meetings, phone calls, emails, text messages, and with file sharing software. All deliverables prepared by the subconsultant will be reviewed by CLS's project manager before being furnished to the client.

QUALITY CONTROL & ASSURANCE

Our communication structure includes weekly meetings among the internal team to ensure key personnel stay apprised of the overall project and individual assignments. Regular topics include project progress, review of budgets, and identification of action items to meet milestones and reach 100% construction completion. This is in addition to the kickoff meeting that occurs immediately upon contract signage and sets the tone, direction, and accountability for the entire project.

Our quality assurance/quality control process will include an up-front review of current County policy to ensure that all current procedures meet the appropriate regulations and guidelines. All program expenditures must be documented, verified, and consistent with the Uniform Act and any funding-specific requirements. CLS will monitor project deliverables to assure they comply with the County's established policies and procedures and Federal guidelines, if and when necessary.





Every team member listed in this proposal is immediately available to begin supporting Burnet County's mission and project delivery. Our team are all a short drive from Burnet, and they can be colocated within County offices as soon as space is made available for them. CLS consists of over 600 ROW professionals, ensuring all projects proceed without delay. CLS will tour the project area with the appraiser, which will allow us to determine potential condemnation and make relocations a top priority, as they can take time and potentially affect the schedule.

Past experiences taught us the importance of coordinating with the design team to ensure the appraiser and acquisition team understand what will be covered by construction and what needs to be included in the appraisal as cost-to-cure items.

PROPOSED METHODOLOGY

Our general acquisition approach would follow these steps:

- » Conduct a kickoff meeting with County staff.
- » Coordinate the appraisals and appraisal reviews in preparation for negotiations and potential litigation.
- » Draft all real estate documents based on format approved by the County and prepare offer packages.
- » Negotiate with property owners regarding necessary conveyance documents needed to support the project construction.
- » Perform landowner contacts and all negotiations in compliance with TxDOT standards to ensure TxDOT certification and eligibility for Federal funding.
- » Facilitate document recording and real property transfer to the County.
- » Close out files and certify real estate, as may be required by funding source.

If necessary, our general relocation approach would follow these steps:

- » Draft relocation plan.
- » Conduct displacee interview(s)
- » Provide general information notice, brochure, and lawfully present information.
- » Deliver 90-day assurance and notice.
- » Provide advisory services.
- » Coordinate and monitor self or commercial move.
- » Vacate inspection.
- » Prepare and file claim payments.





4. SELECT CLS PROJECT EXPERIENCE

Plummer & Associates/San Antonio River Authority (SARA): Martinez IV – Large Diameter Wastewater Line Project (Project 29)

- Project 29 is being constructed to install a new 14,095-linear-foot, 18–36-inch wastewater line from an existing lift station at the Martinez IV Wastewater Treatment Plant to the Millican Grove Lift Station. The project requires the acquisition of easements and temporary construction easements on approximately 18 parcels, and services include right of entry, appraisal management, landowner negotiation, title review and curative, closing services, relocation assistance, and preliminary condemnation support. This project began in January 2022 and is ongoing.

Texas Central Railroad and Infrastructure, Inc.: Texas Central High-Speed Rail

- This is a 240-mile dual track high-speed rail project between Dallas and Houston. ROW services include the entirety of the title and acquisition work, coordinating survey work with the client in the field, obtaining appraisals through a third party for offers and eminent domain, supporting eminent domain efforts and relocation where required, and extensive GIS services and CLSLINK and GIS Viewer implementation. Four thousand tracts were researched by CLS on three separate mainline routes as study parcels, with 1,850 needing to be acquired for rail and supporting facilities. The project began in summer 2015, and assignments were completed in June 2022.

American Structurepoint, Inc. – Hays County: FM 150 at RM 12 Realignment

- This is a realignment of 0.1 miles of FM 150 and relocation of the FM 150 & RR 12 intersection in Dripping Springs, Texas. The \$5.7 million project impacted three parcels and consisted of relocating the FM 150 intersection approximately 300 feet south of its existing location along RR 12 for connectivity to a future Southwest Bypass corridor, including a roundabout alternative. CLS provided title review and curative, landowner negotiations and acquisition, closing services, and condemnation support for three parcels. Services began in April 2020 and concluded in April 2021.

SARA: Bexar County Flood Control Capital Improvement Projects

- Under an Interlocal Agreement between SARA, Bexar County and the City of San Antonio, SARA provided acquisition-related services for Bexar County's Flood Control Improvement Projects. CLS services included project management, title review/clearing, real estate acquisition, closing, and relocation assistance. Relocation services began in 2013. Acquisition services commenced in 2016. All of the following assignments were completed by July 2019:
 - » South Hausman Road LWC LC5 - seven acquisition and easement parcels
 - » French Creek LWC LC23 - 20 easement parcels





- » Medio Creek MR32 - four easement parcels
- » Huebner Creek LC17 - eight acquisition and easement parcels
- » Turtle Cross MR31 - five easement parcels
- » Kirkner Road SA46 - five easement parcels
- » Prue at French Creek LC6 - two easement parcels
- » Cimarron Subdivision CB-9 - two easement parcels
- » Espada Road Acquisition - five acquisition parcels and 17 residential relocation parcels
- » Laddie Place III Project - 45 business relocation parcels
- » Knoll Creek Buyout Project - 19 residential relocation parcels

Freese & Nichols – New Braunfels Utilities: North Kuehler Interceptor Sanitary Sewer Line Project

- The North Kuehler 30-inch and 33-inch interceptor projects included approximately 14,000 linear feet of sanitary sewer mains to include two aerial crossings, instances in which pipes were either attached to bridges or suspended on pylons, two Union Pacific Railroad crossings utilizing micro-tunneling, and one "jack and bore" installation, a process where short segments of pipe are mechanically driven through stable ground without the need for digging an open trench under TxDOT's right of way. CLS provided right of entry, appraisal, and easement acquisition services for approximately 23 parcels in connection with this sewer line replacement project. Project began in March 2019 and was completed in January 2021.

Freese & Nichols – Canyon Lake Water Service Company (CLWSC): Ammann Road 16-Inch Main Water Line Extension Project; Phase 1, Comal County, TX

- CLWSC extended its water system along Ammann Road from Bulverde Road to an existing CLWSC pump station located on Blanco Road. CLS provided easement acquisition services, including right of entry for design and title research and curative services for 23 parcels. The project commenced in February 2020 and was completed in May 2021.

Texas Department of Transportation – Dallas District

- » *IH-35E Widening, Waxahachie, Texas* – Worked through Postmodern Global Solutions, LLC, on two projects totaling \$126.4 million and involving relocation of frontage roads between U.S. 77 South and U.S. 77 North. ROW services included project management, acquisition of 10 parcels (CSJ 0048-04-097) and 58 parcels (CSJ 0048-04-096), relocation, title curative, and condemnation support. Services were completed in accordance with TxDOT policies and procedures and 49 CFR Part 24, consistent with Federal Highway Administration (FHWA) funding. Both projects began in 2019. CSJ 0048-04-097 was completed in April 2021. CSJ 0048-04-096 was completed in December 2021.
- » *IH-35 Widening, Cooke County, Texas (CSJ 0195-01-121)* – Worked through Pinnacle Consulting Management Group, Inc., on a project involving widening of IH-35 and realignment of frontage roads between the Denton County Line to North of FM 3002. ROW services included project management, acquisition of





23 parcels, relocation, outdoor advertising sign (OAS) acquisition and relocation, title curative, and condemnation support. Services were completed in accordance with TxDOT policies and procedures and 49 CFR Part 24, consistent with FHWA funding. Work commenced in 2019 and was completed in April 2022.

- » ***IH-35 Widening, Denton, TX (CSJ 0195-03-091)*** – Worked through Pinnacle Consulting Management Group, Inc. Project involved widening of IH-35 and realignment of frontage roads and interchange with TX 288 Loop between SH 380 and FM 3002. ROW services included project management, acquisition of 42 parcels, relocation, OAS acquisition and relocation, title curative, and condemnation support. Services were completed in accordance with TxDOT policies and procedures and 49 CFR Part 24, consistent with FHWA funding. Work commenced in 2019 and completed in March 2022.

RPS Infrastructure, Inc. – Hays County: RM 12 at RM 3237 Intersection Improvements

- This safety and mobility project consisted of the evaluation, design, and construction of intersection improvements at RM 12 and RM 3237 in Hays County, Texas. The project involved pavement widening of RM 12 to provide dedicated left and right turn movements from RM 12 to RM 3237, one through travel lane with a 4-foot shoulder on RM 12 in each direction of travel, and reconstruction of the traffic signal. CLS provided title research and curative, appraisal coordination, negotiation and acquisition, and condemnation support services. Project began in September 2020 and completed in September 2021.

5. REFERENCES

BRUCE HABY

Manager of Corporate Real Estate
San Antonio Water System
2800 U.S. Hwy 281 North
San Antonio, TX 78212
bruce.haby@saws.org
210.233.3636

DREW HARDIN, P.E.

Freese & Nichols
10431 Morado Circle
Austin, TX 78759
drew.hardin@freese.com
512.381.1839

JOE NEWTON

Asset Manager
Bexar County Flood Control/Bexar
County Public Works
233 N. Pecos #420
San Antonio, TX 78207
jnewton@bexar.org
210.335.6700

DAVID WINKLER

ROW Support
New Braunfels Utilities
263 E. Main Plaza
New Braunfels, TX 78130
dwinkler@nbutexas.com
830.608.8999





6. KEY PERSONNEL

SUMMARIES

LISA ROBINSON, SR/WA, R/W-RAC, R/W-URAC — Contract Land Staff

Lisa Robinson is a project manager, acquisition agent, and relocation agent in the CLS Public Sector Division. She has extensive knowledge in project management, land acquisition, relocation assistance, eminent domain support, title research, title review and title curative. Well versed in the Uniform Act, she has more than 20 years of right of way acquisition and relocation assistance experience. **As project manager, Ms. Robinson will oversee the entire project** in the field during all phases of the project, including managing the contract, project controls, title, title curative, right of entry permission, negotiation and acquisition, administrative settlement, condemnation support, etc. She will provide day-to-day supervision of the agents in the field specifically assigned to different phases of the project.

MICHAEL PHILLIPS, SR/WA, R/W-RAC, R/W-URAC — Contract Land Staff

Mike Phillips entered the right of way profession in 1993 as a relocation assistance officer for the Mississippi Department of Transportation and has worked as a right of way consultant since 2004. He has performed acquisition of real property, rights of way, and relocation functions for various State and public local agencies in Texas, Washington, California, Mississippi, and Oklahoma. His extensive experience includes negotiations involving commercial and residential properties, environmental mitigation easements, utility relocation coordination, large-scale relocation projects and involvement in the acquisition of oil and gas pipeline and surface facilities. **On the Burnet County contract, Mr. Phillips will be assisting with negotiations.**

COLLEEN WILLIAMSON — Contract Land Staff

Colleen Williamson has over 17 years of experience as an account specialist in the natural gas pipeline industry, in addition to in-depth knowledge of property valuation, property appraisals, and practices of budget management. She demonstrates strong abilities in preparing financial reports and documentation; review and monitoring of incoming acquisition paperwork to ensure accuracy and completion; processing and implementing payment disbursements to landowners, vendors, and agencies; and reconciling monthly costs with other departments. Ms. Williamson has exceptional and proven abilities working closely with key personnel (i.e. vice presidents, project directors, ROW supervisors, and ROW agents) to maintain financial records and accounts; monitoring all expenditures, payment requests, checks written, and payments made for the right of way department; data analysis of financial reports to find and correct errors or discrepancies, ensuring accurate data entry of financial disbursements into client databases. **She will serve as administrative support for Burnet County.**





KATHLEEN FOLEY — Siena Realty Advisors

Kathleen Foley, owner of Siena Realty Advisors (SRA), has over 30 years of experience in the appraisal industry. She established SRA in 2019 and is certified as a DBE. SRA specializes in providing appraisal services with an emphasis on right of way eminent domain acquisitions of land, commercial, residential, industrial, mixed-use, and special-use properties; several types of easements; controlled access; and ingress-egress for right of way professional services providers and local municipalities. Ms. Foley is an approved appraiser with TxDOT for professional real estate appraisal services. She holds professional licenses in both Texas and Nevada. An experienced, respected, and qualified real estate appraisal professional, she has a distinctive reputation for providing quality appraisals in a timely, effective, and efficient manner. **Ms. Foley will be performing all appraisals for this contract.**

LISA RIALS, R/W-AC — Rials Appraisal Review and Consulting (DBE/SBE/HUB)

Lisa Rials has been the owner and president of Rials Appraisal Review and Consulting for almost nine years, performing appraisal review services for right of way and eminent domain projects. Her experience includes land, access rights, easements (permanent and temporary), single-family and multifamily properties, hotels, office and retail buildings, self-storage facilities, industrial facilities, and mixed- and special-use properties with a wide variety of companies and agencies. She has worked in the TxDOT districts of Abilene, Austin, Beaumont, Bryan, Dallas, Houston, San Angelo, San Antonio, Tyler, and Yoakum. Additionally, she has performed appraisals and reviews for Central Texas Regional Mobility; the Cities of Pearland, Round Rock, Manor, and Santa Fe; and Hays County. **Ms. Rials will be performing appraisal review on the Burnet County project.**

ABRIDGED RESUMES

Please see more detailed resumes for our proposed staff on the following pages.





LISA A. ROBINSON, SR/WA, R/W-RAC, R/W-URAC
Project Manager / Senior Agent



Years Experience: 20+
Years with the Firm: 20+
Years Licensed: 20

City of Residence: Hewitt

Areas of Specialization

- Project Management
- Acquisition
- Relocation
- Eminent Domain
- Title Research
- Title Review
- Title Curative

Registrations/Licenses

- International Right of Way Association (IRWA) SR/WA
- IRWA RW-RAC
- IRWA RW-URAC
- Texas Real Estate Sales Agent, License No. 505743
- Texas Notary Public

Continuing Education

- CLS / Right of Way Project Land Management Program

Education

- Sam Houston State University
- Blinn College

Lisa Robinson is a Project Manager, Acquisition Agent, and Relocation Agent in the CLS Public Sector Division. Extensive knowledge in project management, land acquisition, relocation assistance, eminent domain support, and title research, title review and title curative. Well versed in The Uniform Relocation Assistance and Real Property Acquisition Policies Act of 1970. More than 20 years of right of way acquisition and relocation assistance experience.

Lisa oversees the entire project in the field during all phase of the project including managing the contract, project controls, title, title curative, right of entry permission, negotiation and acquisition, administrative settlement, condemnation support, etc., providing day to day supervision of the agents in the field specifically assigned to different phases of the project.

Public Infrastructure Experience

- **New Braunfels Utilities – Avery Park Water Main Extension Project** – Project Manager and Acquisition Agent for 68-parcel project.
- **New Braunfels Utilities – Highway 46 West Water System Expansion Project (aka Emergency Copper Ridge Water System Improvements)** – Project Manager and Acquisition Agent for 21-parcel project.
- **New Braunfels Utilities – North Kuehler Interceptor Project** – Project Manager for 24-parcel project.
- **New Braunfels Utilities – Bretzke Phase 2 Water Main Project** - Project Manager for 18-parcel project.
- **San Antonio Water System** – Project Manager and Acquisition Agent for current on call contract to provide turnkey easement acquisition services. Recent services include providing Notification Letters and acquiring Rights of Entry at multiple locations throughout Bexar County for emergency sewer main repair projects ranging in size from 15 parcels to 77 parcels.
- **San Antonio River Authority – Bexar County Flood Control Improvement Project** – Project Manager, Acquisition Agent, Relocation Agent for 11 projects involving 56 easement parcels, 62 relocation parcels and 19 residential buyout parcels.
- **San Antonio River Authority – San Antonio Housing Authority – Wheatley Courts Revitalization Project** – Project Manager for 51-parcel project and Relocation Agent on 19 parcels.
- **Canyon Lake Water Service Company – Ammann Road Waterline Extension Project Phase 1** – Project Manager and Acquisition Agent on 26-parcel project.
- **Hays County FM 150 at RR 12 Realignment Project** – Project Manager on a 3-parcel project.

Transportation Project Experience

- **TxDOT Austin – IH-35** – Project Manager and Acquisition Agent on advanced acquisition project with 4 parcels.
- **TxDOT Dallas – IH-35E** – Project Manager, Acquisition Agent and Condemnation Support on 2 projects totaling 69 parcels.
- **TxDOT Houston – FM 2218** – Acquisition Agent and Condemnation Support for 37 parcels.
- **TxDOT Houston – US 90A** – Project Manager for 19-parcel project.



MICHAEL H. PHILLIPS, SR/WA, R/W-RAC, R/W-URAC
Relocation Agent



Areas of Expertise

- Publicly owned real property-buying, selling, exchanging, leasing
- Expert in land title examining
- Understands complexity of multiple business relocations and displacee benefits
- Specializes in transportation and linear corridor projects
- Eminent domain expertise and support

Licenses / Certifications

- SR/WA Designation, 1996
- R/W-RAC Certification, 2002
- R/W-URAC Certification, 2015
- Real Estate Sales Agent, Texas, License No. 650583
- Notary Public, Texas
- Local Government Project Procedures Qualified, TxDOT
- Broker, California

Education

- Southwestern Oklahoma State University, B.S., Business Administration,
- Numerous continuing education seminars and specialized courses

Associations / Memberships

- International Right of Way Assoc.
- Reserve Officers Association
- American Legion
- Houston Association of Petroleum Landmen
- The Gideons International

Mike Phillips entered the right of way profession in 1993 as a relocation assistance officer for the Mississippi DOT and has worked as a right of way consultant since 2004. Mike has performed acquisition of real property and rights of way, and relocation functions for various state and public local agencies in Texas, Washington, California, Mississippi, and Oklahoma. Mike's extensive experience includes negotiations involving commercial and residential properties, environmental mitigation easements, utility relocation coordination, large scale relocation projects and involvement in the acquisition of oil and gas pipeline and surface facilities.

Project Experience

FM 2218, TxDOT, Richmond, Texas – Acquisition Agent on 20 parcels and Relocation Agent on 1 parcel. Worked with project team to acquire 101 total parcels for widening of FM 2218 in Fort Bend County. Provided relocation services for the displacee including close coordination with acquisition agent and TxDOT to ensure parcel was vacant to meet construction schedules. Relocation completed under URA/TxDOT relocation standards.

1710 Telephone Road Project, SER-Jobs for Progress, Inc., Houston, Texas – Provided relocation services to SER-Jobs for Progress, Inc. to facilitate compliance with their City of Houston/HUD grant funding program. He has developed the relocation plan, prepared the project budget, and has coordinated with City of Houston staff to ensure the non-residential tenants are relocated in accordance with URA/HUD standards.

New Hope Housing Services Hamilton Street Project, Houston, Texas – Mike provided consulting services to New Hope Housing, Inc. to facilitate compliance with their City of Houston/HUD grant funding program. He reviewed/revised the Relocation Plan, displacee notifications, and recommended best practices to ensure the 67 low income tenants were treated in accordance with URA/HUD standards.

CR-2331/Nueces Road, County of Liberty, Texas – Acquisition lead responsible for the acquisition of easements for the re-alignment of CR-2331/Nueces Road in Dayton Lakes. The project is funded using TXCDBG Disaster Recovery funds provided by HUD. Mike worked to locate heirs and/or officers of a dissolved corporation and coordinated the donation of another parcel. Ensured all parcels were acquired following HUD guidelines.

Reese Bayou Drainage Project, County of Liberty, Texas – Responsible for the acquisition of easements for the widening of an existing ditch system, located in Cleveland, Texas, including removing storm debris, vegetation, and obtaining permanent access easements for future maintenance of the bayou. Prepared appraisal waivers and negotiated with each landowner for survey access. Ensured all parcels were acquired following URA/HUD/GLO guidelines.

Raywood Waterline Project, County of Liberty, Texas – Responsible for the acquisition of easements for a new waterline in rural Liberty County. The project is funded using Texas Community Development Block Grant (TXCDBG) Disaster Recovery funds provided by the U.S. HUD. When the previous right of way firm was fired, Mike reviewed the files, corrected documentation, and located heirs. In the course of his review, he determined that several parcels had undivided interests, and not all parties had been previously contacted. He has met with each party to ensure the offer was properly made. He ensured all parcels were acquired following URA/HUD/GLO guidelines.

Glen Park Drainage Improvement Project, City of Cleveland, Texas – Acquisition lead responsible for the acquisition of easements for a City of Cleveland drainage improvement project, funded using TXCDBG Disaster Recovery funds. Mike completed the appraisal waivers, as well as successfully negotiated with all landowners. All parcels were acquired without use of condemnation.



Colleen Williamson
Right of Way Specialist

Firm

- Contract Land Staff, LLC

Experience

- 17 Years

Areas of Expertise

- Document Preparation
- Data Entry
- Files
- Mail Merge
- Spreadsheets
- Reporting

Industry Experience

- Pipeline
- Real Estate
- TxDOT Property Disposal

Education

- IRWA Relocation Courses

Technical Skills

- MS Word
- MS Excel
- MS Outlook
- MS Power Point
- CLS LINK™
- Rowdmap

Colleen has over 17 years experience as an Account Specialist in the natural gas pipeline industry in addition to in-depth knowledge of property valuation, property appraisals, and practices of budget management. She demonstrates strong abilities in preparing financial reports and documentation, review and monitoring of incoming acquisition paperwork to ensure accuracy and completion, processing and implementing payment disbursements to landowners, vendors, and agencies, as well as reconciling monthly costs with other departments.

Colleen has exceptional and proven abilities working closely with key personnel (i.e. Vice Presidents, Project Directors, ROW Supervisors, and ROW Agents) to maintain financial records and accounts, monitoring all expenditures, payment requests, checks written and payments made for the Right of Way department; data analysis of financial reports to find and correct errors or discrepancies ensuring accurate data entry of financial disbursements into client databases.

RECENT RELEVANT EXPERIENCE

Contract Land Staff, LLC – Sugar Land, TX | Data/Document Specialist | 2018 – Present

- Knowledge of CLS Link database.
- Ability to work on TxDOT projects as well as SAWS and SARA projects.
- IRWA courses in Relocation began in 2022.
- Ability to care for the office needs of Austin office and San Antonio office.
- Prepare billing for TxDOT projects as well as help out with billing on ETC projects and Kinder Morgan projects per Director request.
- Data and Documents Specialist for TxDOT projects - FM 2218 and Waxahachie I-35 expansion; New Braunfels Utilities - Avery Park; San Antonio Watershed "SAWS" – Multiple Projects; San Antonio River Authority and Plummer – Project 29.

Pattern Energy – Wind Energy | Contract Land Analyst | November 2016 – December 2017

- Put data into a proper line list format for Southern Cross Transmission Project.
- Locate lost data by locating landowner for Southern Cross Transmission Project.
- Prepare, print, and mail hundreds of letters for unused segments on Southern Cross Transmission Project.
- Prepare, print, and mail hundreds of packets for segments that were chosen for Southern Cross Transmission Project.
- Continually update landowner information on Southern Cross Transmission Project.
- Set-up digital landowner files as initial title work came in from the field for Southern Cross Transmission Project.
- Other projects in the final phases, have documents countersigned and notarized in order to request lease payments.

LISA K. RIALS, R/W-AC
Rials Appraisal, Review and Consulting (DBE/SBE/HUB)

PHONE: (844) 901-9993 – EMAIL: Lisa.Rials@rialsarc.com

PROFESSIONAL BACKGROUND

January 2015- Present: Owner/President of 901 Enterprises, LLC – DBA Rials Appraisal, Review and Consulting

Appraisal Review Services for Right-of-Way and Eminent Domain Projects. Experience includes land, access rights, easements (permanent and temporary), single-family and multi-family properties, hotels, office and retail buildings (multi and single tenant), self-storage facilities, industrial facilities, mixed-use, and special-use properties with the following companies and agencies:

- Texas Department of Transportation districts: Abilene, Austin, Beaumont, Bryan, Dallas, Houston, San Angelo, San Antonio, Tyler, and Yoakum
- DEC Engineering, Contract Land Staff, HDR Engineering, LJA Engineering, HNTB, KCI, THC Inc, Lockwood, Andrews & Newman, Inc (LAN), Lonestar Right of Way Services, O.R. Colan Associates (ORC), Post Modern Global Solutions, LLC (PGS), Property Acquisition Services, LLC (PAS), PTP Transportation, Stateside Right of Way Services, , and Rannells Land Services
- Central Texas Regional Mobility, City of Pearland, City of Round Rock, City of Manor, City of Santa Fe, and Hays County Texas

ASSOCIATIONS AND STATE CERTIFICATIONS

- Texas Certified General Real Estate Appraiser #TX-1380783-G
- International Right of Way, R/W-AC Certified
- Appraisal Institute, Practicing Affiliate
- IRWA Chapter 74, Programs Committee
- Texas Department of Transportation Pre-Certified Appraiser
- Texas Department of Transportation PREAS Appraiser Contract
- La Grange Evening Lions Director/Member

COMPANY CERTIFICATIONS AND AWARDS

- Certified as a Disadvantaged Business Enterprise (DBE), Small Business Enterprise, and Texas Historically Underutilized Business (HUB).
- 2021 IRWA Chapter 74 – Employer of the Year

EDUCATION

- Professional and Continuing Education through the Appraisal Institute, International Right of Way Association, McKissock, and others.
- B.A. in Business Administration, Management and Finance, Walsh University.



Rials Appraisal, Review and Consulting

We started with Sandra Rials Appraisal Review & Consulting, who had more than 30 years of appraisal services. Our business is certified as a Disadvantage Business Enterprise (DBE), Small Business Enterprise (SBE) and Historically Underutilized Business (HUB). The company specializes in providing appraisal review services with an emphasis on right-of-way eminent domain acquisitions of land, commercial, residential, industrial, mixed-use, special-use properties, various types of easements, controlled access, and ingress/egress for the Texas Department of Transportation, Right of Way Professional Services providers, and Local Public Agencies. We have provided expert appraisal review services, participated in approximately 100-projects, and reviewed over 2,000 parcels.

Completed Right of Way Projects near Burnet County:

Hays County:

- Cotton Gin Road
- CR190
- FM 150
- FM 621-Staple Rd.
- FM 2001
- Hillside Terrace
- RR 12

Travis County:

- IH 35 CAPEX- North, South, and Central Segments
- RM 620
- US 183
- US 281
- US 290

Bastrop County:

- SH 71
- FM 969

Lisa Rials, R/W-AC, and Ray Rials, R/W-AC are Texas Certified General Real Estate Appraisers and are on the TxDOT Appraiser Pre-Certified List have been awarded TxDOT PREAS contracts. Our company believes in incorporating continuing education to more effectively address the changing aspects of real estate appraisal and review requirements mandated by USPAP and eminent domain litigation. We are committed to each project, ensuring our workflow process, technology, project management, and communications lead to a quality and comprehensive appraisal review product to meet clients' needs.

Contact Information:

Lisa Rials and T. Ray Rials
Appraisal, Review and Consulting
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Kathleen A. Foley
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O: (214) 870-5462; M: (702) 510-2274
Email: sienarealtyadvisors@gmail.com; kathleenfoleyre@gmail.com

Kathleen Foley, owner of Siena Realty Advisors (SRA), has over thirty (30) years of experience in the appraisal industry. She established Siena Realty Advisors in 2019 and is certified as a Disadvantaged Business Enterprise (DBE). SRA specializes in providing appraisal services with an emphasis on right-of-way eminent domain acquisitions of land, commercial, residential, industrial, mixed-use, special-use properties, several types of easements, controlled access, and ingress-egress for Right-Of-Way Professional Services providers and Local Municipalities.

Ms. Foley is an approved Appraiser with the Texas Department of Transportation for professional real estate appraisal services. She holds professional licenses in both Texas and Nevada. Kathleen is an experienced, respected, and qualified real estate appraiser professional. She has a distinctive reputation for providing quality appraisals in a timely, effective, and efficient manner.

Experience:

Siena Realty Advisors, LLC from 2019 to the present
Independent Appraiser from 1996 - 2019
Las Vegas Appraisal, Inc. 1993-1996

Real Estate and Appraisal Experience:

Real Estate Broker in Texas
Real Estate Broker Salesperson in Nevada
Certified General Appraiser in Texas
Certified General Appraiser in Nevada

Licenses and Certifications:

Certified General Real Estate Appraiser – Texas License No. 1380509-G
Certified General Real Estate Appraiser – Nevada License No. A 0002151-CG
Real Estate Broker – Texas License No. 696961
Real Estate Broker Salesperson – Nevada License No. BS.0034463
Disadvantaged Business Enterprise designation – Certification No. WFDB73794Y01124

Education:

University of Nevada, Las Vegas – Bachelor of Science
Numerous Appraisal Courses offered by the Appraisal Institute
Right-Of-Way courses offered by the International Right-Of-Way Association

Affiliations:

Appraisal Institute – Practicing Affiliate
International Right-Of-Way Association – Member, Chapter 36
National Association of Realtors



Firm Overview

Firm Profile

Siena Realty Advisors (SRA) was formed in 2019 and has been active in the Real Estate Appraisal business for over four years in the State of Texas. The owner of the firm has been in the Real Estate Appraisal business for over thirty years and is well qualified in all aspects of the appraisal industry.

SRA has a team of ten affiliated appraisers holding professional certifications and designations. Kathleen Foley and three additional team members are approved with the Texas Department of Transportation for Professional Real Estate Appraisal Services (PREAS).

SRA has been active in the International Right of Way Association and Appraisal Institute. SRA is also a certified Disadvantage Business Enterprise (DBE); Certification No. WFDB73794Y0124. Our team members are highly trained and experienced in appraisal methodologies and techniques required to address complex eminent domain issues. Senior team members are qualified as expert witnesses and provide litigation support and testimony.

Siena Realty Advisors specializes in providing appraisal services with an emphasis on right of way eminent domain acquisitions of land, commercial, residential, industrial, mixed-use, special-use properties, several types of easements, controlled access, and ingress/egress for Right of Way Professional Services providers and local municipalities.

Local Mailing Address

Siena Realty Advisors
16910 Dallas Parkway, Suite 102
Dallas, Texas 75248

Point of Contact

Kathleen Foley, Owner

Email:

sienarealtyadvisors@gmail.com

kathleenfoleyre@gmail.com

O: (214) 870-5462

M: (702) 510-2274

Relevant Firm Experience

Texas Department of Transportation: Recent significant projects for TxDOT include the Interstate 30 "Canyon" project through downtown Dallas; US 80 from Dallas to Mesquite covering 43 parcels; State Highway 5 through Melissa and Anna covering 85 parcels; and Interstate 35 and FM 455 through Sanger covering over 200 parcels. Additionally, several smaller projects have also been successfully completed within the last four years.

North Texas Municipal Water District: The first reservoir in nearly 30 years in the state of Texas, led by the North Texas Municipal Water District (NTMWD) in Fannin County. The Bois D' Arc Lake Project consisted of appraisal services for fee applications, permanent easements (such as water flowage, water line, and raw water line easements), and temporary construction easements. When coupled with appraisals performed for Select Right-Of-Way to re-establish all overhead electric transmission lines serving the area, the total parcel count was almost 200 parcels. Significant litigation support was conducted for the project.

City of Dallas, Dallas Water Utilities: The Trinity River Corridor in Dallas – Able Pump Station Project (on the east side of the Trinity River) included proposed utility easements along Riverfront Boulevard and Woodall Rogers Freeway. The Trinity River Corridor in Dallas – Charlie Pump Station Project (on the west side of the Trinity River) included proposed utility easements along East Colorado Boulevard and the west side of Interstate 35E. The City of Dallas and the US Army Corps of Engineers are working in conjunction on the approximately \$135.25 million project to include Lamar Levee and Cadillac Heights Levee construction. This levee extension system is an opportunity to deliver to the residents and businesses of Dallas long-awaited flood risk management.