



SACRAMENTO CITY UNIFIED SCHOOL DISTRICT BOARD OF EDUCATION

Agenda Item# 10.9

Meeting Date: May 15, 2025

Subject: Approve Process for Hiring Real Estate Consultant

- ☐ Information Item Only
- ☐ Approval on Consent Agenda
- ☐ Conference (for discussion only)
- ☐ Conference/First Reading (Action Anticipated: _____)
- ☐ Conference/Action
- ☒ Action
- ☐ Public Hearing

Division: Facility Support Services

Recommendation: The Superintendent is recommending the board provide direction for staff to solicit proposals for real estate services to assist in analyzing potential uses, development, and/or sale of District surplus property.

Background/Rationale: The district Board of Education voted to surplus certain properties at the board meeting on May 15, 2025. The next steps for this process is to:

1. Establish a budget for real estate services as needed
2. Seek input from the Board of Education on expectations for surplus properties
3. Process a Request for Proposals for real estate work
4. Continuous update to the Board on progress of the work and collect feedback.

At the end of the process, each property proposal will be brought to the Board at a later date for action.

A sample Request for Proposals has been attached hereto for reference.

Financial Considerations: ~\$1 Million, General Fund; will be reimbursement from any potential property proceeds.

LCAP Goal(s): Goal 1 – Graduation Outcomes, Goal 2 – Academic Outcomes, and Goal 3 – Welcoming and Safety Outcomes

Documents Attached:

- Sample Request for Proposals for Real Estate Asset Management Services and Real Estate Brokerage Services

Estimated Time of Presentation: 5 minutes

Submitted by: Chris Ralston, Assistant Superintendent, Facility Support Services

Approved by: Janea Marking, Chief Business and Operations Officer
Lisa Allen, Superintendent

Request For Proposals
For
Real Estate Asset Management Services and
Real Estate Brokerage Services

Sacramento City Unified School District
Sacramento, California

[DATE], 2025

Issued By:

Sacramento City Unified School District
5735 47th Avenue,
Sacramento CA 95824

REQUEST FOR PROPOSALS

Sacramento City Unified School District
5735 47th Avenue,
Sacramento CA 95824

[DATE], 2025

**REQUEST FOR PROPOSALS
SACRAMENTO CITY UNIFIED SCHOOL DISTRICT
REAL ESTATE ASSET MANAGEMENT AND BROKERAGE SERVICES**

The Sacramento City Unified School District invites proposals from qualified licensed real estate brokerage entities, partnerships, corporations, associations, or professional organizations to provide asset management services and real estate brokerage services for certain real property consisting of [ADDRESSES] ("Sites"). See attached depiction of the Sites.

Interested entities are invited to submit their proposals in a sealed envelope enclosing five bound copies of submittals and email an electronic pdf copy of the requested materials as further described herein to the District's administrative office at:

[NAME], [POSITION]
Sacramento City Unified School District
5735 47th Avenue,
Sacramento CA 95824
Telephone: (916) 643-7400
Email: [EMAIL]

All Responses are due by: [DATE] at [TIME]

FAX OR EMAIL RESPONSES WILL NOT BE ACCEPTED

If you have questions regarding this Request for Proposals ("RFP"), please submit in writing via email on or before [TIME], [DATE], to [NAME], [POSITION], by email at: [EMAIL]. All correspondence regarding the RFP process must be in writing via e-mail and shall be made available to all proposers. No verbal questions will be answered. Except as described herein, proposers are not to contact District staff or members of the District's Governing Board about this RFP or the selection process. Responses to questions will be posted on the district website no later than [DATE] at [TIME] at [WEBSITE].

This is a request for proposals and is not an offer by the Sacramento City Unified School District to contract with any party responding to this RFP. The Sacramento City Unified School District reserves the right to reject all proposals and issue a new request for proposals or withdraw this RFP at any time.

Sincerely,

[NAME]

[POSITION]

Sacramento City Unified School District

SAMPLE

1. Introduction, Objective and Background

The Sacramento City Unified School District is requesting proposals from licensed real estate brokerage entities or individuals to assist with the analysis of potential uses and development of the Sites, and to provide listing and sale/lease services related to the potential sale/lease of the Sites. The District has not at this time made any decisions concerning the potential development and uses of the Sites, but it is the intent of this RFP to select an entity that can investigate these potential uses and, should the District's Governing Board so choose, ultimately to list and sell or lease the Sites. In addition to traditional housing development, one potential use of the Sites is for District workforce housing and entities with such experience are encouraged to list their qualifications and relevant experience in their proposals. The successful entity should also provide a full range of real estate brokerage services related to the sale or lease of the Sites. Expertise in representing public sector clients, specifically including public school districts, and familiarity with the rules and regulations of local agencies and the California Education and Government Codes related to the sale or lease of surplus real property is essential.

Commented [LR1]: Delete if not applicable.

The background of the Sites is as follows:

[INSERT SITE INFORMATION]

2. Proposal Outcomes

The selected entity will be required to sign a fee agreement prepared by the District and may also be required to sign a listing/broker agreement with the District that is acceptable to the District.

3. Limitations

This RFP is not a formal request for bids, nor an offer by the District to contract with any party responding to this RFP. This RFP does not commit the District to award a contract or to reimburse any proposer for costs incurred in submitting a proposal. The District, in its sole discretion, reserves the right to: reject any or all proposals submitted, choose any combination of proposals, interview any, all, or none of the proposers, negotiate with any proposer, extend the deadline to submit a proposal, or amend or cancel in part or in its entirety this RFP. All documents submitted in response to this RFP shall remain the property of the District and may be subject to disclosure under the California Public Records Act.

4. Proposal Requirements (review 4.8 for Listing Agreement and Commission)

Proposers shall respond to each item noted below, within the specific format described. Please be concise in your responses and limit responses to relevant information.

4.1 Cover Letter and Letter of Interest

Maximum of two pages. Must include name of the proposing entity, address, telephone number, fax number, e-mail address, name of principal to contact, California real

estate license(s) and other professional licenses, if any, and professional designations and affiliations. The letter must be signed by a representative of the proposing entity with authorization to bind the entity by contract.

4.2 Executive Summary

The Executive Summary should provide a summary of the key features of the qualifications of the Proposer and its experience in California public school site sales and leases, workforce housing development (if any), due diligence review, feasibility studies, governmental approvals, land use planning, and development, listing and selling or leasing surplus public property including surplus public school property and marketing strategy to list and sell or lease the Site.

4.3 Organization, Credentials and Background

Provide a brief history of the entity, submittal to include:

- Number of years in business
- Location of office which will perform the work
- List of basic services provided
- List of additional services provided by entity

4.4 Relevant Experience

Proposer should provide a list of engagements involving relevant school district surplus site development and disposition, planning for and/or development of workforce housing, due diligence investigation, and development feasibility studies. Proposer should also provide a list of relevant California school district surplus property listing and sales and lease transactions. Please include the following information:

- Project name(s) and location(s)
- Year complete and current status
- Client/District name
- Project revenue and/or cost to the public agency
- Project description

4.5 Project Team

Identify the following key team members and provide their qualifications:

- Principal-in-charge
- Project manager/supervisor and key participants, with resumes
- Broker of record or licensed real estate broker(s)
- State and/or local agency advocates

- Any partners from outside your entity with whom you would propose to work

Personnel identified for these positions are expected to be involved throughout the term of services and may not be changed without the approval of the District. The proposer should identify any proposed consultants who will provide services and include resumes for each such person or entity.

4.6 Client Satisfaction and References

Provide responses to the following questions:

- Has your entity ever been terminated or replaced by another entity during any school district related project?
- Has your entity or personnel ever been the subject of a disciplinary proceeding by the California Contractors State License Board or the California Department of Real Estate or any other California licensing authority? Please explain in detail the nature and outcome of the proceeding.
- Has the real estate license of your entity or personnel ever been suspended or revoked? Please explain in the detail the nature and outcome of any suspension or revocation.
- Has your entity or personnel ever been involved in a lawsuit related to services provided by your entity or personnel? Please explain in detail.
- Provide a list of at least five (5) educational client references for whom your entity has provided similar services to those described in this RFP. For each client provide the following information:
 - School district name and address
 - Contact name and phone number
 - Projects or services performed for district if not already included in response to 4.4
 - Date project or services were completed

4.7 Financial Stability

Proposer is to provide a statement of the proposer's financial ability. Additionally, the proposal should include answers to the following inquiries:

- Is the proposer a subsidiary of, or affiliated with, any other corporation, corporations, partnerships or firms? If so, please specify. If the proposer is a subsidiary, please indicate the extent to which the parent entity will guarantee performance of the subsidiary.
- Has the proposer or its officers, principal members, shareholders or investors, or any of its parent, subsidiary, or affiliated entities or other interested parties been adjudged bankrupt, either voluntarily or

involuntarily, within the past ten years? If so, please explain the circumstances.

- Is there any pending litigation against the entity or its officers, principal members, shareholders or investors, or any parent, subsidiary or affiliated entities or other interested parties, other than minor personal injury suits involving claims under \$100,000.00? If so, please explain the nature of the litigation and its procedural status.

4.8 Fee Structure

The proposed fee structure shall state any fees and costs the District may anticipate relating to the Scope of Work, and if structured as hourly fee work, the names and hourly rate of each person providing the services. In relation to the potential sale or lease of the site, the proposal must also include the proposed listing agreement, the amount of the commission, the structure and payment of the commission, and any fees and costs the District may anticipate paying that is not included within the commission.

4.9 Proof of Insurance

The intent of the required insurance is to protect the District from any claims, suits, actions, costs, damages, or expenses arising from any negligent or intentional act or omission of the successful proposer or its agents and consultants while performing services for the District. The successful proposer will be required to provide proof of insurance coverage, and such insurance coverage shall be maintained in full force and effect during the term of the listing agreement, as follows:

- Commercial General Liability: Limits of at least \$1,000,000 per occurrence and \$1,000,000 aggregate. District shall be included as additional insured on the CGL on a Primary, Non-Contributory basis.
- Automobile Liability: Limits of \$1,000,000 each accident for owned, hired and borrowed and non-owned motor vehicles. District shall be included as additional borrowed and non-owned motor vehicles. District shall be included as additional insured on the auto policy on a primary, non-contributory basis.
- Professional Errors and Omissions Insurance \$1,000,000 per occurrence or claim, \$1,000,000 aggregate for the professional acts of the successful proposer performed under the listing agreement with the District. Coverage shall remain in effect for two years following the closed escrow.
- All insurance required under this section shall contain a waiver of subrogation if available.

The District in its discretion may waive or modify the above insurance requirements.

4.10 Certification of Proposer

Proposer must provide a certification under penalty of perjury under the laws of the State of California that all the information provided in the Proposal is true and correct.

5. MINIMUM REQUIREMENTS

Proposers must have a minimum of ten (10) years of experience in providing asset management and real estate services of the type described herein, of which a minimum of five (5) years must be for public sector clients.

6. SCOPE OF WORK

The successful proposer shall be responsible for providing asset management and real estate brokerage services related to the evaluation of the Sites and the possible sale or lease of all or a portion of the Sites. The services will include, but not be limited to:

- Identification and analysis of potential disposition and development possibilities for the Sites.
- Provide a monthly status report to the assigned staff contact related to the investigation of potential development and uses of the Sites.
- Once District has decided on the use of the Sites, provide a monthly status report to the assigned staff contact about current/new efforts/contacts/leads and other developments concerning the use, sale or lease of the Sites.
- Should the District elect to pursue workforce housing on the Site(s), provide advice and representation to District in relation to the same.
- Consult with assigned staff regarding services provided and conduct presentations regarding services to District's Board of Trustees.
- Coordinate with District legal counsel and consultants as necessary.
- Handle all other customary activities and services associated with real estate brokerage services.

7. Schedule: Selection Process and Award; Protests

7.1 Schedule

The District currently anticipates making a selection by [DATE], though additional time may be required. Proposers may be asked to interview with District Board and/or staff.

Deadline for Submittals: [DATE]

7.2 Selection Process and Award

The District will determine the successful proposer based on overall responsiveness to this RFP, demonstrated competence and professional qualifications to provide the required services and the proposed fee structure for performing the Scope of Work as provided in this RFP.

The District may elect to interview the proposers to assist in its selection process.

The District's Governing Board reserves the right to select more than one (1) proposer in the event that multiple proposers may be open to partnering.

SAMPLE

Depiction of Sites

4904-6700-0892, v. 1

SAMPLE

{SR756213}