



**Business Services  
Contracts Office**

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*José L. Banda, Superintendent  
Gerardo Castillo, Chief Business Officer*

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**REQUEST FOR STATEMENT OF  
QUALIFICATIONS  
For  
REAL ESTATE  
ADVISORY SERVICES**

Request for Qualifications Issued: May 11, 2015

Deadline for Submittal of Qualifications: June 9, 2015

# Request for Statement of Qualifications for Real Estate Advisory Services

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## I. OVERVIEW

### Introduction

The Sacramento City Unified School (District) is seeking statements of qualifications from firms that can provide advisory services related to real estate.

### Background

The Sacramento City Unified School District is an urban district with an enrollment exceeding 43,000 students in 77 pre-K through Adult schools. The District covers 75 square miles. Its buildings comprise over 5 million square feet of traditional school buildings, portable classrooms, administrative offices, and school sites that have been closed due to low enrollment, as well as vacant buildings on the historic register. The District is governed by an elected board of seven members who serve four-year terms, and is staffed by over 3,000 teaching, support, and administrative employees.

## II. GENERAL INSTRUCTIONS

Interested firms are invited to submit one (1) original signed proposal, six (6) additional hard copies, and one (1) digital copy (flash drive) in write protected PDF format.

The proposal shall be submitted in the format provided and the complete proposal, together with any and all additional materials, shall be enclosed in a sealed envelope addressed and delivered no later than 4:30 p.m. on Tuesday, June 9, 2015 to the following address:

Sacramento City Unified School District  
Contracts Office  
5735 47<sup>th</sup> Avenue  
Sacramento, CA 95824

The sealed envelope shall be marked on the outside lower left corner with the words “RFQ for Real Estate Advisory Services”. It is the firm’s sole responsibility to ensure that their response is received prior to the scheduled closing time for receipt of statements of qualifications. No corrected or resubmitted proposals will be accepted after the deadline. Faxed responses are not appropriate for submission and will not be accepted or considered.

This Request for Statement of Qualifications does not commit the Sacramento City Unified School District to award a contract or pay any costs incurred in the preparation of a response to this request. The District reserves the right to accept all or part of any responses or to cancel in part or in its entirety this Request for Statement of Qualifications. District further reserves the right to accept the response that it considers to be in their best interest.

All requirements must be addressed in your proposal. Non-responsive proposals will not be considered. All responses, whether selected or rejected, shall become the property of the District. Firms are responsible for checking the website periodically for any updates or revisions to the RFQ.

## Requests for Information

Questions related to this RFQ should be submitted in writing to Kimberly Teague, Contract Specialist, at [kimt@scusd.edu](mailto:kimt@scusd.edu) no later than Friday, May 22, 2015. Specify “RFQ for Real Estate Advisory Services” in the subject line. Responses to all questions received will be posted on the Districts website, [www.scusd.edu](http://www.scusd.edu) > Offices > Contracts > Request for Proposals.

### III. SCOPE OF SERVICES

1. Assist District in making informed decisions regarding the ultimate disposition of properties identified by the District.
2. Act as the District’s advisor **but not as an agent or broker** for the ultimate transaction of any property.
3. District may require assistance in developing Request for Qualifications/Proposals on any property identified by the District to be sold, exchanged, leased or otherwise utilized. The District may also seek assistance in reviewing any or all proposals derived from the RFQ/RFP process.
4. The District may require assistance for the purposes of maximizing the value of any surplus real property and assistance in determining the best proposal for any related disposition and/or joint use opportunity.
5. The District may require assistance in identifying potential properties for acquisition for various District purposes.

In light of the complex and fluid nature of a project of this type, there will no doubt be many issues that arise that need to be addressed that are not explicitly described in this Scope of Services. The firm must be prepared to work collaboratively with the District to address these issues as needed.

Firm is expected to be qualified to assist the District in:

- Making an informed decision regarding market value of property the District may consider for surplus.
- The **negotiation** of sale, lease, or other method of transfer of District-owned property as requested.
- Making an informed decision respecting the suitability of the targeted site(s) for the Districts intended use and the probable economic impact of any decision to proceed with the lease or purchase of the site(s).
- The **negotiation** of the terms of lease, including monthly rent and tenant improvements, if applicable.

- All other matters incidental to the Districts real estate activities as described above, including but not limited to facilitating the inspections and investigations by the District and communicating with other parties as to the status of the Districts due diligence activities and the overall status of the transaction. In carrying out all of the foregoing tasks, Firms representing the District shall work closely and cooperatively with District staff.

Outside counsel may be involved in a variety of ways as the process proceeds. The scope and budget for outside counsel is not addressed in this Scope of Services.

#### **IV. CONTENTS FOR PROPOSALS**

In order for proposals to be considered, said proposal must be clear, concise, complete, well organized and demonstrate both respondent's qualifications, and its ability to follow instructions. The quality of answers, not length of responses or visual exhibits is important.

The proposals shall be organized in the format listed below and shall be limited to thirty (30) pages (excluding attachments and appendices) on 8 ½" x 11" paper with all responses bound with tabs separating each section. Respondents shall read each item carefully and answer accurately to ensure compliance with District requirements. Failure to provide all requested information or deviation from the required format may result in disqualification.

##### **A. Submittal Letter**

Include the RFQ's title and submittal due date, the name, address, and telephone number of the responding firm. Include a contact person and corresponding e-mail address. The letter shall state that the Proposal shall be valid for a 60-day period and that the staff proposed is available immediately. The person authorized by the firm to negotiate a contract with District shall sign the cover letter.

##### **B. Description of Firm**

This section should provide information regarding the size, location, nature of work performed, years in business and the approach that will be used in meeting the needs of the District.

##### **C. Organizational Structure**

Describe your firm's organizational structure. Provide the names of the professionals who will be responsible for this project. Please provide brief resumes for these individuals.

##### **D. References and Description of Experience**

This section should identify similar services that the firm has completed as outlined in the RFQ. Use this section to indicate the areas of expertise of your firm and how that expertise will benefit the District. Include at least three (3) references (preferably school districts) along with the names of individuals familiar with your work that can be contacted by District staff.

## **E. Project Overview**

This section should clearly convey the firm's understanding of the nature of real estate services and the general approach that will be used.

## **F. Cost**

This section must provide a full description of the expected expenditures for the work described in this RFQ. Cost proposed must include all consultant fees, preparation of deliverables, travel expenses per trip to Sacramento (if applicable), printing, etc.

## **V. SELECTION CRITERIA**

Firms submitting proposals are advised that all proposals will be evaluated to determine the firm deemed most qualified to meet the needs of the District. The selection criteria will include, but not be limited to, the items listed below:

- A.** Demonstrated understanding and responsiveness to the Request for Statement of Qualifications.
- B.** Experience of firm and personnel named in the Statement of Qualifications.
- C.** Past experience assisting California school districts with real estate needs.
- D.** Advisory approach, including an understanding of the District.
- E.** Oral interview (if applicable).
- F.** Completeness and quality of the Statement of Qualifications.
- G.** Cost

## **VI. PROCESS FOR SELECTING FIRM**

A Selection Advisory Committee will evaluate and select those firms deemed to be the most highly qualified to perform the required services.

The Selection Advisory Committee may choose to interview any, all, or none of the respondents as may be in the best interest of the District. If interviews are held, selected firms will be notified as to place, time, date and purpose of the interview.

The names of all firms submitting proposals and the names, if any, selected for interview shall be public information. At the conclusion of the RFQ process, committee comments and evaluation scores, as well as the contents of all proposals become public information. Firms that have not been selected will be notified in writing after the conclusion of the selection process.