



Pasadena Unified School District
Surplus
Property Disposition Consultant
Request for Proposal

Date Issued: October 20, 2009

Date and Time Due: 9:00 a.m. November 5, 2009

I. INTRODUCTION/PURPOSE

The Pasadena Unified School District (the "District") is soliciting qualified firms to consult on the disposition of surplus property. The Board of Education has identified 15 potential surplus sites for review and potential disposition.

The attached Request for Statement of Qualifications ("RFP") is intended to select a qualified firm to provide services for the period from November 16, 2009 until March 15, 2010 to evaluate properties, analyze alternatives, and make recommendations to the Superintendent for sustained revenue generation.

Responses are due by 9:00 a.m., November 5, 2009 to the Facilities Office of the Pasadena Unified School District, 740 West Woodbury Road, Pasadena, California 91103.

II. GENERAL REQUIREMENTS/SCOPE OF WORK

The selected firm will be expected to organize and facilitate a process for evaluating properties for potential sustained revenue generation and make recommendations to the Superintendent

The scope of services set forth in this RFP represents an outline of the services which the District anticipates the successful firm to perform, and is presented for the primary purpose of allowing the District to compare proposals. The precise scope of services to be incorporated into the Project Agreements shall be negotiated between the District and the successful firm. The firm may suggest changes to the scope of services (as part of the proposal) in order to achieve the District's objectives. Please refer to Exhibit A, Sample of Potential Duties."

The District will be holding interviews the week of November 9, 2009.

After a firm has been selected, additional District records will be made available as needed as well as Staff assistance in completing scope definition, schedule and work plan.

III. QUALIFICATIONS

To participate, interested firms must meet the following minimum requirements:

- a. Firm's length of time in business as a property consultant must be a minimum of seven (7) years.
- b. Firm must have offices and service support located in the State of California.
- c. Firm should have a sufficient number of qualified and

experienced employees assigned to the District in order to respond to the District on an as-needed basis and must provide the District a means to assure this availability.

- d. During the last five (5) years, the firm must have been retained for a minimum of five (5) assignments of at least \$10 Million.
- e. Firm must provide evidence financial stability in the form of a company financial statement or other means of documentation acceptable to the District.
- f. Firm must provide at least three references documenting satisfactory performance in the past three years.
- g. Firm must provide evidence of satisfactory experiences to support at least two public entities in the past five years.

The District reserves the right to waive any of these requirements at its sole discretion. The District reserves the right at its sole discretion to reject any and all submittals or to waive any irregularity or informality in any submittal or in the submission process. No submittal, or any portion thereof, may be withdrawn for a period of 60 calendar days after submittal opening. For more information, contact the Chief, Facilities, Steve Brinkman in writing or via email:

sbrinkman@pusd.us

IV. BACKGROUND

The Pasadena Unified School District is comprised of 28 schools drawing from several neighborhoods located in the Cities of Pasadena and Sierra Madre and the Los Angeles County area of Altadena. The schools and educational support programs serve approximately 19,000 students.

The District has been in declining enrollment for the past decade. As a consequence it has excess facilities capacity. This has prompted the closure of several schools and some existing schools have low enrollment. The State-wide fiscal crisis has caused the District to evaluate local opportunities to supplement its revenue in an effort to maintain its educational programs. One of these potential sources of revenue is lease revenue from its real estate assets.

V. INSTRUCTIONS FOR RESPONDENTS

a. Submittal Deadline

Responses to Request for Qualifications must be received no later than 9:00 a.m. on November 5, 2009. Provide five (5)

original copies of your response to:

**Pasadena Unified School District
Attn: Steve Brinkman
Chief, Facilities
Facilities Office
740 West Woodbury Road
Pasadena, CA 91103
(626) 396-3604
(626) 255-4158 Cell
(626) 798-1024 Fax**

Submit request in an envelope, sealed, and clearly marked: **Request for Statement of Qualifications – Property Disposition Consultant.**

It is the firm's responsibility alone to ensure that the RFP is received prior to the hour and date specified in this RFP. Any proposals received after the hour and date may be deemed ineligible for consideration.

Responses may not be submitted by facsimile but can be submitted by electronic mail to sbrinkman@pusd.us

If you have any questions, please contact Steve Brinkman at the number and email address listed above.

b. **Response Format and Content**

Responses are to be prepared in such a way as to provide a straightforward and concise discussion of the firm's ability to satisfy the requirements stated herein. **Emphasis should be concentrated on conformance to the RFP instructions, responsiveness to the RFP requirements and on completeness and clarity of content.**

In order to facilitate evaluation and comparison of responses, it is **mandatory** that all responses be submitted in the format described in this section. Format instructions must be adhered to; all requirements and requests for information in the RFP must be responded to; all requested data must be supplied. Failure to comply with this requirement may be cause for rejection, at the District's sole discretion.

Answer on 8 ½" X 11" sheets. Assemble your response in the following order. Responses should be numbered in a manner, of the firms own choosing, that allows for easy reference. Submit five (5) original copies of your response. To conserve resources we ask that responses be duplexed if possible.

1. **Cover Letter**

This shall be a brief letter of introduction transmitting the qualifications of the firm and indicating the name, address, telephone number, fax number, and e-mail address, if any, of the person(s) authorized to make representations for the firm and to negotiate final terms and conditions on behalf of the firm.

2. Company Profile/Experience

Provide background information including:

- Company ownership. If incorporated, the state in which the company is incorporated, and the date of incorporation.
- Location of the company main offices.
- Location of the office servicing California account(s).
- Number of employees both locally and nationally.
- Location(s) from which employees will be assigned.
- Name, address, and telephone number of the firm's point of contact for a contract resulting from this RFP.
- Company background/history and why firm is qualified to provide the services described in this RFP, including:
 - Proof that the firm has been regularly engaged in the business of property disposition consulting consisting of, but not limited to, athletic capital projects specified herein for at least the past seven (7) consecutive years. Complete documentation indicating in detail that the contractor has competent staff to support a project of this scope.
 - Length of time firm has been providing services for public agencies described in this RFP. Please provide a brief description.
 - A list of a minimum of five (5) satisfactory assignments completed during the last five (5) years of at least (Five) \$10 Million.
 - A copy of a company financial statement or other suitable evidence of financial stability acceptable to the District.
 - A statement summarizing any pending litigation involving any officer or principal of/or the bidding company, the nature

of the litigation and what affect the litigation may carry as it relates to this work in the worst case scenario. Non-disclosure of this item, if later discovered may result, at the owner's discretion, in the contractor bearing all costs attendant with the transfer of the work to a new firm and any cost related to associated delays in the progress of the work.

- Evidence of liability, professional services, auto, and worker's compensation insurance coverage.

3. Personnel Qualifications

The firm shall identify the engagement team and any other key personnel involved, including subconsultants and co-proposers. The firm shall indicate the primary contact. A brief resume for each person should be included as an appendix, listing specific qualifications applicable to experience with similar projects in California.

A list of any applicable business or professional licenses or certificates required by the nature of the contract work to be performed and/or ability to obtain any additional licenses or permits that may be required.

Note: If you plan to sub-contract work, you must indicate the name and address of each firm and the type of work or tasks they will perform. Identify the personnel to be assigned, their position, qualifications and representative experience.

4. Plan and Approach to Scope of Work

A detailed description of the services the firm intends to provide. The description shall include, at a minimum, the following items:

- A performance and cost schedule or estimate for all services to be provided. This schedule should specify the major components, the cost breakdown by major component, and the scope of services outlined in the proposal.
- A total proposed "Not to Exceed" cost of the services, or other method of determining costs of services, including a Fee Schedule describing all charges and hourly rates for services. This is to be provided in a separate sealed envelope

- Proposed terms for an agreement by which the work shall be performed.

5. References

Include a minimum of three (3) recent transactions for which the firm has performed similar services for entities of similar size, scope, and complexity as the District. Please list a reference (name, title, and phone number), as well as a description of the service performed, and indicate the dollar amount of the project, and the dates of performance.

6. Conflict of Interest

Prepare a statement which discloses any past, ongoing, or potential conflicts of interest which the firm may have as a result of performing the work for this engagement.

VI. RESPONSE REVIEW AND EVALUATION

a. Validation

Responses will be checked for the information required to conform to this RFP. Absence of required information may be cause for rejection.

b. Evaluation

All responsive proposals shall be reviewed and evaluated by the District in order to determine which firm best meets the District's needs by demonstrating the competence and professional qualifications necessary for the satisfactory performance of the required services. Responses will be evaluated based on, but not limited to, related experience of the respondents, knowledge of the District, professional qualifications of individuals to be assigned to the District, rates/fees, overall proposal content and references. The District retains the right to interview applicants as part of the selection process. The District is not bound to award a contract to *any* party submitting a response. If the project is awarded, the successful applicant will be informed not later than 5:00 p.m. August 10, 2009.

c. Non-Collusion Affidavit

Please complete the mandatory Non-Collusion Affidavit attached to this RFP and return it with your response.

Upon completion of a review period, the District shall notify those firms whose proposals will be considered for further evaluation and negotiation. All firms so

notified may be required to attend interviews or make presentations and shall negotiate in good faith in accordance with direction from the District. Any delay caused by firm's failure to respond to direction from the District may lead to a rejection of the Proposal.

If the District determines, after further evaluation and negotiation to award an agreement, a Professional Services Agreement shall be sent to the successful firm for signature. No proposal shall be binding on the District until after the Agreement is signed by duly authorized representatives of both the firm and the District and duly confirmed by the Pasadena Unified School District's Board of Education.

The District will be the sole judge in choosing the firms who will proceed to the formal interview stage. The District reserves the right to reject any or all responses.

The District shall not be responsible for any explanation or interpretations of the RFP other than by written addendum delivered to each firm. No oral interpretations of any provision in the RFP shall be binding upon the District.

This request does not in any way constitute an offer of employment or contract for services.

It may be necessary for the District to request additional information from one or more firms and the District reserves the right to do so. It is anticipated that this review period will be concluded by 5:00, August 5, 2009.

All proposals must remain effective for ninety (90) days from date of submittal.

All responses to this RFP shall become the exclusive property of the District.

The District reserves the right to reject any and all responses, wholly or in part, to waive any informality in a response, to request clarification of information from any firm and to effect any agreement deemed by the District to be in its best interest with one or more firms.

The District will not reimburse firms for any costs associated with the preparation or submittal of any response.

Nothing contained in this RFP, the responses, or in the District's acceptance of any response in whole or in part shall oblige the District to complete negotiations with any firm. The District reserves the right to end, in its sole discretion, negotiations with a firm at any time up to the consummation of the transactions arising from this RFP.

The Pasadena Unified School District is an equal opportunity, affirmative action employer and invites qualified Disabled Veteran Business firms to participate in this process.

Exhibit A

Sample of Potential Duties

The scope of services set forth in this RFP represents an outline of the services which the District anticipates the successful firm to perform, and is presented for the primary purpose of allowing the District to compare proposals. The precise scope of services to be incorporated into the Project Agreements shall be negotiated between the District and the successful firm. The firm may suggest changes to the scope of services (as part of the proposal) in order to achieve the District's objectives.

- >Analyze the District's current available properties for potential revenue generation and make recommendations to the Superintendent
- >Analyze proposals from developers and other entities and provide recommendations to Superintendent that meet the short term interest of revenue generation and long term interest of available future space and asset retention.
- >Represent the District with government agencies, city, and county to analyze proposals and make informed recommendations.
- >To represent the District in negotiations with developers and others who are interested in use of District facilities.
- >Analyze District demographic data to determine the time properties will be available before the need to house district students.
- >Participate in meetings and facilitation processes that address asset management
- >Prepare reports or studies as needed for presentation to the Staff, Board, Board Committees, Public entities and the general public

**NONCOLLUSION AFFIDAVIT TO BE EXECUTED
BY BIDDER AND SUBMITTED WITH SUBMITTAL**

_____, being first duly sworn, deposes and says that he or she is _____ of the party making the foregoing bid that the bid is not made in the interest of, or on behalf of, any undisclosed person, partnership, company, association, organization, or corporation; that the bid is genuine and not collusive or sham; that the bidder has not directly or indirectly induced or solicited any other bidder to put in a false or sham bid, and has not directly or indirectly colluded, conspired, connived, or agreed with any bidder or anyone else to put in a sham bid, or that anyone shall refrain from responding; that the bidder has not in any manner, directly or indirectly, sought by agreement, communication, or conference with anyone to fix the bid price of the bidder or any other bidder, or to fix any overhead, profit, or cost element of the bid price, or of that of any other bidder, or to secure any advantage against the public body awarding the contract of anyone interested in the proposed contract; that all statements contained in the bid are true; and, further, that the bidder has not, directly or indirectly, submitted his or her bid price or any breakdown thereof, or the contents thereof, or divulged information or data relative thereto, or paid, and will not pay, any fee to any corporation, partnership, company, association, organization, bid depository, or to any member or agent thereof to effectuate a collusive or sham bid.

I certify (or declare) under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

(Date)

(Signature)

This form *must* be completed and submitted with your response.