

## **REQUEST FOR PROPOSALS REAL ESTATE BROKER SERVICES**

### **OVERVIEW**

The Community Foundation for Southern Arizona is seeking to create a Center for Nonprofits which will house the Foundation its partners, programs and affiliates and additional nonprofit organizations. The Foundation has identified the building, 1700 East Broadway, and surrounding residential lots it must purchase to make this vision a reality for the community. We are therefore seeking a real estate firm specializing in commercial real estate with experience in purchasing and assembling multiple parcels with different zoning. We are not seeking a firm in this proposal to sell our current property located at 2250 East Broadway.

The Community Foundation for Southern Arizona works with individuals, families and businesses to create charitable funds that support the causes the community cares about. Under its umbrella it houses many programs and affiliates including the Women's Foundation of Southern Arizona, Social Venture Partners, the LGBT&S Alliance Fund and Oro Valley and Santa Cruz Community Foundations.

### **PROPOSAL OVERVIEW:**

The following information is required and must accompany your proposal:

1. **COVER LETTER:** Provide a cover letter indicating your interest in serving The Community Foundation for Southern Arizona's (CFSA).
2. **BACKGROUND INFORMATION:** For example, list years in business with a description of your firm including size of firm, location, number and nature of the professional staff to be assigned to this contract, with a brief resume for each key person listed.
3. **EXPERIENCE SUMMARY:** Describe your firm's pertinent real estate experience.
4. **ADDITIONAL SERVICES:** Describe additional relevant/unique services offered through your firm.
5. **FEE SCHEDULE:**
  - a. State your commission rate associated with your proposal
  - b. State your proposed method of compensation for representing CFSA in negotiations for purchasing property/ leasing facilities.
  - c. State any other costs CFSA should anticipate relating to the real estate services to be provided.
  - d. State any required 'carry-over compensation' for your firm— meaning, compensation after real estate service agreement expires.

NOTE: Quoted fees shall be valid for a minimum of 60 days upon receipt.

6. REFERENCES: Provide a list of three applicable references. Include name, title, and contact information for each reference as well as a brief description of the specific services provided.
7. CONFLICT OF INTEREST: In order to avoid a conflict of interest, or the appearance of a conflict of interest, your firm should not engage in any outside activities that are inconsistent, incompatible, or appear to conflict with your ability to exercise independent/objective judgment in the best interest of CFSA. Please outline all conflicts of interest that may exist for your firm in relation to providing real estate services for CFSA.
8. GOOD STANDING: Your firm must be in compliance with Federal, State, County and local units of government; which specifically includes good tax payment status and good corporate registration status. Please indicate the payment status of taxes applicable to your firm. Additionally, please provide your firm's legal corporate name and Tax ID number, as reflected by State of Arizona records.
9. DIVERSITY: preference is given to vendors with a proven record of a commitment to diversity and inclusion as a practice. Please include your diversity/inclusion statement.

#### GENERAL INSTRUCTIONS

1. The proposal must be submitted to the CFSA offices, 2250 E. Broadway Blvd. or via email to [ssmith@cfsaz.org](mailto:ssmith@cfsaz.org) on or before 12:00 p.m. on July 1, 2016.

A Selection Committee will review the proposals and develop a list of finalists to interview. *The Applicants are responsible for ensuring that their proposal, however submitted, is received on time and at the location specified.*

2. To be considered, firms must submit a complete response to the RFP in the form requested. Firms not responding to items requested in the RFP or indicating exceptions to such items may have their submittals rejected.
3. CFSA reserves the right to reject any and all proposals, or any parts thereof, or to waive any informality or defect in any bid if it is in the best interest of the CFSA. All proposals, plans, and other documents submitted shall become the property of the CFSA.
4. Respondents are responsible for their own expense in preparing, delivering or presenting a proposal, and for subsequent negotiations with the CFSA, if any.
5. All questions may be directed to the following contact person: Shari Stapleton-Smith at [ssmith@cfsaz.org](mailto:ssmith@cfsaz.org), or 520 209-2862.

## **SCOPE OF SERVICES**

The successful firm shall agree to contract with the CFSA to provide the following:

- Retention of any and all third parties to verify the condition of the property, its prior use, and any potential liability and zoning issues, whether structural soundness or necessary upgrades of electrical
- Successful negotiation and purchase of all properties and parcels
- Coordinate real estate transaction closings; and
- Handle all other customary activities and services associated with real estate transactions.

## **TERM OF CONTRACT**

The contract period for the successful agent/firm will be six months from date of award. The contract may be renewed for additional terms upon satisfactory performance by the broker/firm and at a negotiated rate agreed to in writing by both the agent/firm and the CFSA. Alternate contract periods may be considered.

## **EVALUATION AND AWARD PROCESS**

Issuance of this RFP and receipt of proposals does not commit the CFSA to award a contract. CFSA reserves the right to postpone receipt date, accepting or rejecting any or all proposals received in response to this RFP, or to negotiate with any of the brokers/firms submitting an RFP, or to cancel all or part of this RFP.

## **SELECTION CRITERIA**

**Selection of a broker/firm will be made based on the following criteria:**

1. Ability of the contractor(s) to meet or exceed the requirements defined in the RFP;
2. Experience, qualifications, references;
3. Knowledge of regional real estate market;
4. Regional reputation and local presence/experience;
5. Fee schedule.

## **ORAL PRESENTATION/INTERVIEWS**

Firms submitting a proposal in response to this RFP may be required to give an oral presentation of their proposal. Additional technical and/or cost information may be requested for clarification purposes, but in no way change the original proposal submitted. Interviews are optional and may or may not be conducted.

A recommendation of the selected consultant will be made to the CFSA Facilities Committee. The selected consultant and CFSA representatives will negotiate a mutually acceptable contract.

