

Request for Proposals 21RFP007 Real Estate Consultant

Date	Event
June 9, 2020 and June 16, 2020	Dates of public notice
June 17, 2020	Due date for questions by 5:00 pm
June 19, 2020	Questions and answers posted on our website
June 30, 2020	RFP opening / due date at 2:00 pm CST
August 24, 2020	AISD Board meeting for review/approval

Deliver Electronic Proposals to:

kristy.gonzalez@austinisd.org

By 2:00PM CST on June 30, 2020

Using the Subject Line:

**21RFP007 Real Estate Consultant –
CONFIDENTIAL**

Contact:

Kristy Gonzalez
Senior Procurement Specialist
Phone: 512-414-2123
kristy.gonzalez@austinisd.org

Due to COVID-19 precautions and to prevent the spread of COVID-19, and in an effort to provide ongoing support and services for Austin ISD, the District has decided to accept proposals for 21RFP007, Real Estate Consultant via email to: kristy.gonzalez@austinisd.org no later than **Tuesday, June 30, 2020 at 2:00 p.m. CST.**

To ensure a fair and transparent solicitation process and the integrity of submissions:

- All Proposals submitted via email will not be opened until AFTER due date and time.
- Proposals received via email after the specified due date and time shall not be considered.
- Firms must place the following information in the subject line of the email containing your submission:
- **21RFP007 Real Estate Consultant – CONFIDENTIAL**
- Proposals submitted via email should not exceed 20MB. If attachment is more than 20MB, please zip the file or separate it into two (2) attachments and email separate emails with the subject line above.
- Proposals must still be submitted in the specified format and all Required Forms must be signed and submitted with emailed response.
- Submit questions via e-mail to: kristy.gonzalez@austinisd.org
In the e-mail subject line, type: *Questions* 21RFP007 Real Estate Consultant
- Questions & Answers and addenda will be posted on our website: www.austinisd.org/cp/bids

Checklist and Submission Guidelines

This checklist is provided to help you conform to all form/document requirements stipulated in this solicitation and attached herein.

(This is not a required form, it is not necessary to return this checklist with your proposal.)

Understanding the Proposal

Completed

- ☐ Read entire RFP document, appendices and attachments
- ☐ Review AISD Policy and Provisions on our website: [Policy and Provisions](#)
- ☐ Attend pre-proposal conference (not required)
- ☐ Submit questions properly before deadline
- ☐ Review addenda, Q&A and other additional attachments
- ☐ Review Proposal Format section of RFP

Forms

Completed | Required

- ☐ | ☒ Bid Certification
- ☐ | ☒ Notification of Criminal History of Contractor
- ☐ | ☒ Debarment, Suspension and Ineligibility Certification
- ☐ | ☒ Conflict of Interest Questionnaire (CIQ) – electronic
- ☐ | ☒ Strategic Partner Profile
- ☐ | ☐ EDGAR Vendor Certification
- ☐ | ☐ Software Vendor Certification Form

Submitting the Proposal

Completed

- ☐ Prepare the proposal in the format specified and sign all required forms
- ☐ Submit required hard copy marked “original”
- ☐ Submit requested quantity of digital copies on flash drive
- ☐ Submit requested quantity of hard copies marked “copy”
- ☐ Package proposal in sealed envelope or carton properly labelled
- ☐ Deliver proposal to delivery address by RFP opening / due date and time

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I. INTRODUCTION

The Austin Independent School District (herein after referred to as “AISD” or the “district”) is seeking proposals from Real Estate Consultants qualified and experienced in providing real estate site suitability studies, economic market analysis, and highest and best use analysis reports in accordance with Board approved Policy and Guidelines. Upon completion, the Report will provide guidance to the District regarding the allowable uses of the school sites that will be repurposed in a manner that will support the following goals:

- Determine a list of the top uses for each of the sites;
- Assure future uses are financially viable;
- Increase the availability of diverse affordable housing;
- Promote projects that strengthen the local economy, sustain economic activity and build resilience against economic downturns;
- Engage an equitable lens in projects and project locations, to ensure District-wide community benefits;
- Value and preserve any historical or architectural significance of the buildings
- Ensure displacement or gentrification are not unintended consequences of specific real estate projects.

Each Bidder, by submitting its proposal, agrees that the proposal is subject to the Austin ISD Policies and Provisions and agrees to comply with those conditions. Acceptance of a proposal will occur only when a contract is executed. Any contract will incorporate the Austin ISD Policies and Provisions and Standard Terms and Conditions and no commitment exists until a contract is executed by both parties.

II. HISTORICALLY UNDERUTILIZED BUSINESS (HUB) PROGRAM REQUIREMENTS

The HUB Program promotes and strongly encourages the involvement and participation of Historically Underutilized Businesses in District-wide procurements. According to AISD policies CH (LOCAL) and CV (LOCAL), the HUB Program guidelines are not applicable for this type procurement.

III. PROPOSAL FORMAT

A. Preface

The Contractor shall provide an executive summary of two (2) pages or less, which gives in brief, concise terms, a summation of the proposal.

B. Proposal

The vendor’s proposal itself shall be organized in the following format and informational sequence:

Section I – Summary of Experience

This section shall contain the full name and address of the contractor submitting the proposal and a brief summary of the contractor's experience and individual experience for personnel who will provide this product or service.

Section II - Scope of Service

A description of services and capabilities as outlined in the Scope of Service and Performance Requirements sections of this RFP, in the order shown. Clearly state any exceptions taken to the specifications of this RFP, or any conditions of the proposal.

Section III - Financial Proposal

This section shall contain a straightforward, concise delineation of the contractor's fees to satisfy the requirements of this RFP. It is the contractor's responsibility to specify all costs (i.e. administrative fees, processing fees, etc.) associated with providing the products or services required herein.

Section IV – References

References are to be from government agencies and/or firms, which are substantially serviced by the vendor (references most similar to Austin ISD should be provided). Each reference must contain the reference's name, address, telephone number, and point of contact (including email address). A list of at least three (3) references from current customers must be provided.

C. Required Forms

Forms are required with **Original response**; they can be excluded from additional requested copies.

Contractor shall execute the following required forms (located on our website: [Required Forms link](#)), and return the **signed original** with the proposal:

- Bid Certification
- Notification of Criminal History of Contractor
- Debarment, Suspension and Ineligibility Certification
- Strategic Partner Profile
- Conflict of Interest Questionnaire (CIQ). The CIQ is prepared by the Texas Ethics Commission, in compliance with Chapter 176 of the Texas Local Government Code. The form should be submitted on-line at [Conflict of Interest Questionnaire - CIQ](#).

IV. INITIAL REVIEW OF PROPOSALS

Any contractor determined non-responsible or any proposal determined non-responsive will not be evaluated further. The contractor will be notified of a non-responsible or non-responsive determination.

Responsive

In order for a proposal to be responsive:

- ALL required forms listed above shall be signed and included with proposal;
- Proposal shall be received prior to the RFP opening date at the address listed on the cover page;
- Proposal shall respond to the entire scope of service and performance requirements as requested.

Responsible

In order for a proposal to be responsible, the contractor shall be in good financial standing with the Texas Comptroller of Public Accounts.

V. COMPETITIVE SELECTION / EVALUATION

- A. This is a NEGOTIATED procurement and as such, award will not necessarily be made to the offeror submitting the lowest priced proposal. Award will be made to the firm submitting the best responsive proposal satisfying AISD's requirements, price and other factors considered.

Consistent with state law and district policy, this RFP does not commit the district to award a contract. The district reserves the right to accept or reject any or all proposals and/or award in whole or in part any proposal if the district determines it is in the best interest of the district to do so.

- B. The district anticipates that the evaluation process may include multiple levels of evaluation, as for example, but not limited to:
- Phase 1: Initial review of the proposal by the district's evaluation team.
- Phase 2: Interviews and/or presentations of top proposals from Phase 1, followed by administrative review of finalist(s) and award recommendation.

PHASE 1

Points	Item	Detailed Description
30 Points	Proposed Plan	The adequacy and completeness of the plan offered addressing the description of services.
30 Points	Contractor's Capabilities, Experience, Personnel and References	The demonstrated ability of the contractor to provide services, including experience and references.
40 Points	Financial Proposal	Start-up costs, fixed service fees as well as rebate incentives to determine best value.

PHASE 2 (optional)

Points	Item	Detailed Description
35 Points	Interview / Presentation	The adequacy and completeness of the plan offered addressing the Scope of Service.
35 Points	Contractor's Capabilities	The demonstrated ability of the contractor to provide services, including references.
30 Points	Financial Proposal	Start-up costs, fixed service costs, ongoing fees, etc.

- C. The committee evaluating the proposals submitted in response to this RFP may require any or all contractors to give an oral presentation in order to clarify or elaborate on their proposal as well as to provide a demonstration. Upon completion of oral presentations or discussions, contractors may be requested to revise any or all portions of their proposals and submit a best and final offer (BAFO) for consideration.
- D. If the district determines that additional evaluation steps are required to determine the best value between Contractors, the district reserves the right to consider any or all of the following additional criteria; the proposed price, contractor's experience, references and record for responsibility, or any other relevant factor that the district deems necessary to determine best value.

VI. SCOPE OF SERVICE AND PERFORMANCE REQUIREMENTS

Term

The agreement(s) resulting from this solicitation will be in effect for an initial term of two (2) years from the date of award by the Board of Trustees, or such date established by the agreement. The parties by mutual consent may renew the agreement for up to two (2) additional one (1) year periods. In addition, the district reserves the right to extend the contract

for an additional time beyond the final expiration date if necessary to ensure no lapse in service.

Background

The District is committed to working with the school communities to develop repurposing strategies for school sites projected to close due to recently agreed upon consolidations. AISD recognizes that these sites are community assets and each site will be evaluated to determine the highest and best use for the community but also what will serve the District best for future generations. The process of review will require robust conversations, detailed analysis and future planning to explore the repurposing of the properties. When the District decides to sell, lease, or repurpose land, the Board requires that any determinations are made in line with objectives including community use, expanding the availability of affordable housing or workforce housing, and selecting uses that are fiscally sound.

To ensure decisions around these sites are made in the best interests of their local communities, AISD will follow the elements of the Board approved Repurposing Framework for Community Development starting with determining site suitability. The factors to be reviewed during the site suitability include but are not limited to;

- a) The environmental impact of any future use;
- b) The cost of any future use;
- c) The development impact of any future use to the community and;
- d) The allowable zoning and rezoning of the site.

AISD's priority is to implement the aforementioned framework in order to assess facilities by their ability to advance existing communities, make most efficient use of the current facility configuration and assure future uses are financially viable. Potential uses include but are not limited to affordable housing, fine arts centers, vocational and shared working spaces, mixed-use community centers, childcare centers, and educational gardens.

A. Scope of Services

The scope of the site analysis and evaluation will include but not be limited to the following:

- a) Real Estate Analysis Services
 - i. Provide current market value of select district-owned properties based on current land-use, zoning and redevelopment highest-and-best use options.
 - ii. Identify and document current conditions of all existing district-owned structures, including the structural integrity, physical state of each building, and compliance with modern building codes.

- iii. Assess and identify whether each of the buildings are serving their intended role, and if they are under or over-utilized in their current capacity.
- iv. Identify the replacement and/or renovation costs of each building, and make recommendations as to which (if any) buildings should be renovated, replaced, etc., as needed.
- v. Identify any impediments with the sale or disposition of the property for the highest and best use intent.

Additionally, the Consultant is expected to meet with District staff to identify all reliable sources of existing data such as facility inventory lists, plans, maps, studies, etc. Where applicable, existing studies and reports will be provided to the consultant for incorporation into the final report. The types of building systems surveyed may vary with each building and shall include, but are not limited to, the following systems:

- **Site:** topography, drainage, access/egress, paving, curbing, parking, flatwork, utilities
- **Exterior Systems:** foundation, roofs, walls, window systems, exterior doors, civil/structural components
- **Fire/Life Safety Issues:** including hazards, alarms, and fire escapes
- **Heating, Ventilation, and Air Conditioning:** including controls and terminal units
- **Electrical:** including internal electrical distribution and back-up generators (if applicable)
- **Plumbing Systems:** fixtures, supply, storm and sanitary sewer drainage, valving, irrigation
- **Fire Protection**
- **Specialized Construction and Outbuildings**
- **Specialized Equipment and Systems**

The consultant shall inspect all identified facilities to produce an accurate analysis that identifies all components and elements necessary to determine highest and best use valuation and any requiring maintenance, repair, and/or major capital investment that would reduce that valuation. The consultant will perform market analysis to determine a value range between low and high end of the property based on physical land only and a computation that includes improvements such as buildings and utilities, entitlements, etc. The consultant will follow the State requirements and best practices for appraisal methodology. At a minimum consultant shall gather the following information on each property:

- i. **Property Characteristics:** an inventory of all building systems with each system component quantified as a count, an area, a length, and/or a

height; whichever measurement is most appropriate for each system. Confirmation/validation of building area (square footage) shall be obtained during inspection.

- ii. **Age:** Identification/approximation of the year each system component was installed.
- iii. **Current Condition:** an assessment of the current condition of each system component and a determination of the level of repair necessary to restore or replace these components to achieve optimal condition.
- iv. **Facility Needs:** a summary of how each facility is being utilized, identifying whether it is over-or under-utilized and an analysis regarding the suitability of the facility to its current use.
- v. **Historical Review:** a review of the age of the properties and comparison to any applicable local, state or federal registry. For the purpose of this report, system components shall be defined along with a standard list of repairs and action levels for inspectors to choose from in rating each system condition. Action level recommendations and timelines shall be defined for individual components. Standard definitions and systems of actions are intended to provide a more accurate assessment of facilities.

b) Economic Analysis Services

Economic Analysis Services are required to assist District Staff with accurate market data that can help in the development of realistic and effective plans, policies, and regulations. The District will need to determine economic development priorities and further expand on place-based development strategies. Information about market forces will be used to test and shape potential development scenarios so that development parameters are in line with desired outcomes. Planning efforts may also include implementation measures focusing on funding opportunities that need to be identified. Economic Analysis Services may include, but not limited to:

- i. Estimating the market potential for various types of industrial, commercial, and housing sectors, and identifying market gaps. Market demand studies should concentrate on the types of businesses that have the greatest potential for growth and sustainability;
- ii. Creating customized market analyses to assist the District in making informed recommendations;
- iii. Recommendations for developing housing at various affordability levels either as stand-alone projects or within mixed-use projects;
- iv. Feasibility analysis scenarios for specific projects with community benefits, as needed;
- v. Data analysis to support planning efforts presented in graphic formats such as maps and easy-to-understand diagrams and illustrations. Data

- should be structured in such a way as to feed into the District's geographic information systems (GIS);
- vi. Evaluating opportunities for joint development (e.g. public/private partnerships)

B. Consultant Requirements

The successful Consultant shall meet the following minimum requirements:

- a) Have been in business for at least five (5) years;
- b) Have managed at least three (3) projects of a similar size and scope for a governmental entity;
- c) Demonstrated in depth knowledge and expertise in one or more of the following areas:
 - i. Real Estate and Planning Advisory Services- Including, but not limited to, firms that can perform:
 - 1. Land Use and Zoning Analysis
 - 2. Commercial Real Estate Advisory Services
 - 3. Real Estate Market Research
 - 4. Real Estate Financial Analysis
 - 5. Appraisal and Valuation Services
 - 6. Technical Advice and Due Diligence
 - 7. Site Selection
 - ii. Financial and Economic Analysis- Including, but not limited to, firms that can perform:
 - 1. Economic Feasibility Analysis
 - 2. Economic Impact Analysis
 - 3. Cost/Benefit Analysis
 - 4. Regulatory Analysis and Review
 - 5. Due Diligence Analysis
 - iii. Historic Preservation and Adaptive Reuse- Including, but not limited to, firms that can perform:
 - 1. Condition Assessments
 - 2. Historic Structure Report Services

C. Reporting, Evaluation and Key Performance Measures

The District's Contract Manager will be responsible for exercising general oversight of the Consultant's Scope of Work activities. The District's Contract Manager shall specifically:

- a) Provide successful Consultant access to relevant District contacts, data and documents including reports as available;
- b) Collaborate with the Consultant and other relevant entities to obtain sustained participation and support by stakeholder audience including internal and external staff or private sector, and the Board;

- c) Provide contact information and/or coordination within District departments, as needed;
- d) Provide logistical and coordination of stakeholder engagement support;
- e) Participate in conference calls or meetings for status reporting, as scheduled;
- f) Provide and cover printing costs associated with meeting materials and reports;
- g) Provide timely feedback in order to maintain the established timeline; and
- h) Approve all invoices for payment in a timely manner, as appropriate.

Executive Summary of findings and recommendations including the following areas of review:

- a) Strategic drivers for the site and analysis
- b) Creative and organized land-use plan for the site by parcel / area, utilizing the following detailed analyses
- c) Market based demand for asset types to be developed on site
- d) Concept development standards and sample imagery for each parcel / area
- e) Cost modeling and estimates for each parcel / area including all project related costs (inclusive of demolition, renovation, site work)
- f) Development / asset type options recommended and projected planning and financial potential for parcel / each area (including on connections to strategic drivers and CPP mission)
- g) Highest-and-best use analysis for each parcel / area
- h) Stakeholders to engage for each parcel / area (CPP, municipalities, state agencies, transit authorities, etc.)
- i) Risk evaluation for each parcel / area based on CPP strategic drivers, market demand, development opportunities, revenue streams, needed stakeholders, etc.
- j) Inventory of structures on site (size, age, replacement cost, hazardous materials, etc.)
- k) Market study data

VII. APPENDICES AND ATTACHMENTS

- Appendices (Documents included within this proposal):
 - Appendix 1 – Purchasing and Acquisition Vendor Relations Policy CHE-LOCAL
- Attachments (Separate documents available to download):
 - Bid Certification
 - Notification of Criminal History of Contractor
 - Debarment, Suspension and Ineligibility Certification
 - Strategic Partner Profile
 - Conflict of Interest Questionnaire (CIQ). The CIQ is prepared by the Texas Ethics Commission, in compliance with Chapter 176 of the Texas Local Government Code. The form should be submitted on-line at Conflict of Interest Questionnaire - CIQ.