

**PITTSBURG UNIFIED SCHOOL DISTRICT
NOTICE OF REQUEST FOR PROPOSALS
FOR REAL ESTATE ASSET EVALUATION SERVICES**

The Pittsburg Unified School District (“District”) hereby requests proposals to provide real estate asset evaluation services, as listed in the District’s Request for Proposals (“RFP”). The full version of the RFP can be obtained by contacting the District at hharia@pittsburgusd.net.

The District owns nineteen (19) properties. The real estate asset evaluation services to be provided include the analysis of potential uses and development of these District-owned properties. This RFP and any resulting contract shall be subject to all applicable laws (incorporated herein by reference).

Proposals are due no later than: **January 10, 2023 by 4:00 PM** unless extended by the District.

Proposers to this RFP should submit responses electronically in PDF format via email to the Contact Email listed in the RFP below. Proposer is responsible for verifying that the email and attachments have been received. RFP proposals shall be submitted electronically as follows:

Mr. Hitesh Haria
Associate Superintendent of Business Services
Email: hharia@pittsburgusd.net

PROPOSED KEY EVENTS AND DATES FOR THIS RFP

Please note that the below schedule is a tentative proposed schedule of events and is subject to change at the District’s sole discretion.

Event	Date
RFP Advertisement	November 16, 2022
Deadline for Inquiries	January 3, 2023
Proposal Deadline	January 10, 2023
Interviews (if any)	To be completed by February 8, 2023
Notice of Intent to Award	Not later than February 15, 2023
Contract Award	February 22, 2023

Any questions regarding this RFP must be submitted in writing and sent by email to Mr. Hitesh Haria at hharia@pittsburgusd.net on or before **January 3, 2023 by 4:00 p.m.** Any and all responses will be submitted in writing to all recipients of this RFP.

**PITTSBURG UNIFIED SCHOOL DISTRICT
REQUEST FOR PROPOSALS
FOR REAL ESTATE ASSET EVALUATION SERVICES**

School District Name: Pittsburg Unified School District (“District”)

School District Address: 2000 Railroad Avenue
Pittsburg, CA 94565

School District Contact Email: hharia@pittsburgusd.net (“Contact Email”)

Deadline for Proposal Submission: January 10, 2023 (“Deadline”)

Services Requested: Real Estate Asset Evaluation Services (“Services”)

Details regarding the specifics of the Services requested are included in the Anticipated Required Services section below and incorporated herein by reference.

The District invites proposals (“Proposals”) from qualified entities or individuals to provide real estate asset evaluation services, including the analysis of potential uses and development of District-owned properties. Proposals should demonstrate expertise and familiarity with the operations of a California public school district, including classroom loading standards, capacity requirements, and the requirements for disposition of property for public entities. Proposals should also demonstrate experience with analyzing general plan and zoning requirements/restrictions, identifying and analyzing the effects of current/planned developments, and making value determinations based on these considerations. The successful proposer shall be required to comply with any and all applicable requirements in law.

Any Proposals not received by the Deadline may be disqualified at the sole discretion of the District. Questions regarding this RFP may be directed to the Contact Email at least seven (7) days prior to the Deadline. No other members of the District’s staff or Board should be contacted about this procurement during the procurement process. The District may, in its sole discretion, disqualify any proposer who engages in any prohibited communications.

The District reserves the right to cancel or revise this RFP, for any or no reason, in part or in its entirety. The District makes no representation that any contract will be awarded to any proposer responding to this RFP. The District expressly reserves the right to postpone proposal consideration for its own convenience, to waive any informality or irregularity in a proposal received, and to reject any and all proposals received in response to this RFP.

I. BACKGROUND AND DESCRIPTION

The District is a California public school district operating and existing under the laws of the State of California. To meet the growing needs of the District and its surrounding community, the District is requesting proposals from qualified entities or individuals to analyze potential uses and development of its nineteen (19) existing properties. The District has not, at this time, made any decisions concerning the potential development and uses of its properties, but it is the intent of this RFP to select an entity that can investigate the current and future capacity needs of the District and how this may impact the District's future property needs.

It is possible that the entity may, depending on the results of the analysis, be asked to provide listing and sale/lease services related to the potential sale/lease of such properties. In this regard, the successful entity should be capable of providing a full range of real estate brokerage services related to the sale or lease of the District's properties.

Expertise in representing California public school districts is essential. Proposals should demonstrate expertise and familiarity with the operations of a California public school district, including classroom loading standards, capacity requirements, and the requirements for disposition of property for public entities. Proposals should also demonstrate experience with analyzing general plan and zoning requirements/restrictions, identifying and analyzing the effects of current/planned developments, and making value determinations based on these considerations. The Services desired are described in more further detail herein.

II. ANTICIPATED REQUIRED SERVICES

The selected entity or individual will be expected to perform the following services:

1. Evaluate District-owned properties, as identified by District staff, to determine current capacity of existing properties. Use classroom loading standards to analyze current or planned developments within the boundaries of the District and determine capacity needs for the District's school-site properties resulting from such developments. Should the analysis reflect or predict that District school sites will be over capacity, make recommendations for accommodating excess students.
2. Review current zoning and general plan designations for each District property, including the District school sites and the District's main office, to identify legally permissible uses for the property and current restrictions on the property. Provide a value estimate for specific properties identified by the District taking into consideration the value of comparable properties in the area, market trends and projections, identified land use requirements, and plausible buyers.
3. Review property uses in light of all relevant laws pertaining to public entities including but not limited to the California Health and Safety Code, Education Code, Government Code, and Public Contract Code.

4. Compile findings in a written report to the District. Make presentations to District officials and/or the District's Board of Trustees, as requested.
5. Work with District legal counsel to ensure compliance with all legal requirements.
6. Work under the direction of the Business Services Department, using independent professional judgment with respect to methodology, analysis and conclusions. The successful proposer will report directly to the Business Services Department and will not communicate with any third party without the consent of the Business Services Department.
7. Perform additional duties as described by contract or directed by the District.

Please Note: The responsibilities and duties listed herein are stated in general terms and are for informational purposes only. The parties shall negotiate a final agreement after the successful proposer has been selected.

III. TERMS AND CONDITIONS

A. Personnel

The successful proposer shall be capable of performing the work described herein with minimal guidance or direction. All personnel who will be involved in providing the services requested shall have prior experience working on the scope of Services listed above.

B. Term and Payment Method

Proposers should submit a detailed pricing proposal, including but not necessarily limited to a current hourly fee schedule (by job title). If referencing basic services costs, include typical staffing expectations, professional fee schedules, and variations that the District could expect, if applicable.

C. Applicable Laws and Regulations

Throughout this procurement and any subsequently executed contract, all proposers are required to comply with all applicable state, federal, and local laws and regulations, including but not limited to the California Labor Code.

IV. INSTRUCTIONS TO PROPOSERS

A. GENERAL

1. Questions and Inquiries

Any questions regarding this RFP or the Services requested shall be directed, in writing, to the Contact Email specified above. Questions must be submitted in writing, and must be received by the District not later than the date and time established above. All such requests must be accompanied by all relevant information supporting the request for modification, interpretation, or

clarification of this RFP. The District will evaluate any question or request submitted, but reserves the right at its sole discretion to determine whether to respond.

Proposers must refrain from contacting any other member of the District staff, administration or any member of the District's Board of Trustees prior to the final selection of an entity or individual to perform the Services. Any prohibited communications may result in immediate disqualification of a proposer's response to this RFP.

2. Withdrawal of Proposal

Submissions may be withdrawn at any time prior to the closing date and time for receipt thereof specified above. The proposer shall withdraw its submission by delivering a written request signed by an authorized officer of the proposer's organization to the attention of Mr. Hitesh Haria.

3. Proposal Validity Period

The proposer agrees that its proposal will remain valid for 180 calendar days ("Validity Period") following the Proposal Due Date. The District may request an extension of the Validity Period. Once award is made to a proposer, all elements of that proposer's proposal shall remain valid until the completion of the Services where an agreement is executed, including exercise of any potential options.

4. Public Records

All proposals submitted in response to this RFP become the property of the District and responses to this RFP are subject to the provisions of the California Public Records Act (Government Code Section 6250 *et seq.*) and Public Contract Code (PCC) Section 10165.

5. Conflicts of Interest

The proposer shall certify that no official or employee of the District, nor any business entity in which an official of the District has an interest, has been employed or retained to solicit or assist in the procuring of the resulting contract, nor that any such person will be employed in the performance of any contract without immediate divulgence of this fact to the District.

6. Full Opportunity

The District hereby affirmatively ensures that Disadvantaged Business Enterprises ("DBE"), Small Local Business Enterprises ("SLBE"), Small Emerging Local Business Enterprises ("SELBE"), Disabled Veterans Business Enterprises ("DVBE") and minority and women business enterprises shall be afforded full opportunity to submit proposals in response to this RFP and will not be discriminated against on the basis of race, color, gender, sexual orientation, political affiliation, age, ancestry, religion, marital status, national origin, medical condition or disability in any consideration leading to the award of the contract. No qualified person with a disability shall, on the basis of the disability, be excluded from participating in, be denied the benefits of or otherwise be subjected to discrimination in any consideration leading to the award of the contract.

7. Forms

The following attached forms shall be completed and submitted with each Proposal:

RFP Form A – CERTIFICATION

RFP Form B – PROPOSAL SUBMITTAL ACKNOWLEDGMENT

RFP Form C – PREVIOUS DISQUALIFICATION, REMOVAL, OR OTHER PREVENTION OF PROPOSING CERTIFICATION

B. INSTRUCTIONS FOR SUBMITTING RESPONSE

Each proposing entity responding to the RFP shall address the following items in its response. Each item below shall be separated and clearly marked by tabs, or other means, to allow for easy review by the District.

1. Cover Letter

A maximum one-page, dated introductory letter which must include the name of the proposing entity, address, telephone number, fax number, e-mail address, name of principal to contact, 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.

2. Table of Contents

A table of contents of the material contained in the proposal should follow the cover letter.

3. Executive Summary

The Executive Summary should provide a summary of the key features of the qualifications of the proposer and its experience working with California public school districts. This includes any experience in analyzing California public school site classroom loading standards/capacity requirements and performing California public school site sales and leases, due diligence review, feasibility studies, governmental approvals, land use planning and development analysis, and listing and selling or leasing surplus public property including surplus public school property.

4. Description of Entity

Provide specific information regarding the size, financial strength, location, nature of work performed, number of employees, years in business, California business (if applicable), and tax identification number of the proposing entity. Please identify the principal-in-charge who will serve as the District's main contact throughout performance of the Services. Include the address, telephone, and fax number of the office that will be primarily responsible for providing services under the proposal.

Please also provide evidence that the proposing entity is in good standing and able to complete business in the State of California.

5. Background of Entity's Personnel

Identify and provide the background, including resumes, of employees whom the proposing entity expects will be utilized to perform the Services and will make up the project team. If the proposer is selected, the team proposed must remain intact during the procurement process and the life of the Services performed, unless agreed to otherwise in writing by District. By submitting a proposal, proposer acknowledges that the District is making a selection based on the experience and qualifications of the team presented in the proposal and any changes to the team without the consent of the District may constitute a breach of contract by the proposer.

6. Relevant Experience

Proposer should list relevant experience and identify engagements from the past ten (10) years similar to the Anticipated Required Services above. This may include relevant school district surplus site development and disposition, due diligence investigation and development feasibility studies. Proposer should provide the list of relevant California school district surplus property listing, sales and lease transactions including the following information:

- a. Project name(s) and location(s)
- b. Year complete and current status
- c. Client/District name
- d. Project revenue and/or cost to the public agency
- e. Project description

7. Complaints Lodged with Local, State, or Professional Agencies

The proposing entity shall disclose complaint(s), if any, that have been lodged against the proposing entity with any local public agency, any agency of the State of California, or any professional organization with which the proposing entity is affiliated and, if so, describe the nature of the complaint(s) and outcome(s) or anticipated outcome(s). Additionally, the proposing entity shall provide responses to the following questions:

- a. Has your entity ever been terminated or replaced by another entity during any school district related project?
- b. 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.

- c. 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.
- d. Has your entity or personnel ever been involved in a lawsuit related to services provided by your entity or personnel? Please explain in detail.

8. Insurance

The proposing entity shall describe the outcome of claims, if any, filed against the proposing entity's general liability or professional liability insurance carriers during the past five (5) years.

The selected proposer will be required to provide the following minimum amount of insurance coverage:

- a. General Liability (including operations, products and completed operations, as applicable): At least \$1,000,000 per occurrence and \$1,000,000 in the aggregate.
- b. Workers Compensation: As required by the State of California.
- c. Employers' Liability: \$1,000,000 each accident, \$1,000,000 policy limit bodily injury by disease, \$1,000,000 each employee bodily injury by disease.
- d. Errors & Omissions Liability: \$1,000,000 per occurrence.

Endorsements shall clearly state that the District is named as an "Additional Insured" under the policy described and that such insurance policy shall be primary to any insurance or self-insurance maintained by the District. Further, each policy shall be endorsed to state that coverage shall not be suspended, voided, reduced, or canceled except after thirty (30) days prior written notice to the District. The District in its discretion may waive or modify the above insurance requirements.

9. References

The proposer shall list a minimum of five (5) references for whom the proposing entity has provided similar services to the Anticipated Required Services listed above. Please include the following information for each reference provided on separate pages:

- a. Year(s) of services
- b. School district
- c. Current contact person
- d. Title/position
- e. Contact phone number

- f. Project description
- g. Dollar value of the project

10. Plan for Performance of Services and Methodology

Describe the procedures and safeguards the proposing entity will employ to ensure that the needs of the District will be satisfied, including completion of the Services requested herein in a cost-effective and timely manner.

11. Current Projects and Workload

Please describe current projects that the proposing entity is currently engaged in. Please describe how current workload demands on the proposing entity may impact providing the Services requested.

12. Joint Ventures and Associations

If the Services are to be undertaken by the proposing entity in joint venture or in association with one or more other entities, identify the parties involved in such a joint effort, the roles and responsibilities of each party, and whether all parties will be jointly and severally liable for performance and all contractual liabilities. In the event of a joint venture, please provide a copy of the joint venture agreement and identify which entity will be the lead member of the venture. The District reserves the right to require the lead entity to sign a Guarantee concerning the work to be completed.

13. Fee Estimate Range/Terms

Describe your proposed hourly rates for the District's consideration. If the proposed fee approach includes hourly rates for additional services, describe the additional services and the hourly rates or costs associated with these services. The final fee for completion of the Services shall be negotiated with the District should the proposing entity be selected to perform the Services.

14. Other

Each proposing entity is encouraged to provide a description of resources or any other information the proposing entity believes is pertinent to its Proposal. Please do not include brochures or other marketing-related materials.

C. DISTRICT'S EVALUATION PROCESS

Upon the District's receipt of the proposals, each proposal will be reviewed for (a) minor informalities, irregularities, and apparent clerical mistakes which are unrelated to the substantive content of the proposal; (b) conformance to the RFP instructions regarding organization and format; and (c) the responsiveness of the proposer to the requirements set forth in this RFP. Those proposals determined to not be responsive to the requirements of this RFP may be excluded from further consideration and the proposer may be so advised. The District may also exclude from consideration any proposer whose RFP contains a material misrepresentation. The District

reserves the right to reject any or all proposals, to waive minor technicalities or to advertise for new proposals, if in the judgment of the District, such course of action is in the best interests of the District.

The District will review and evaluate proposals submitted in response to the RFP. After an initial screening of the proposals, the District may at its sole discretion conduct in-person interviews with one or more proposers.

Interviews will consist of a proposer's presentation and a question and answer discussion session. The presentation will afford the proposers the opportunity to highlight the significant aspects of their approach and understanding of the Services needed and offer a chance for the District to ask clarifying questions of their proposal. The oral presentation shall not be used to fill in missing or incomplete information that was required in the written proposal. **The key personnel listed by the proposer in its proposal shall conduct the presentation.**

The District reserves the right to contract with one or more proposing entities. The District makes no representation that participation in the RFP process will lead to an award of a contract or any agreement whatsoever.

The District may perform an investigation of the proposers that extends beyond contacting the school districts or other entities identified in the proposals. The District shall have the right to request any additional information from any or all of the proposing entities, to select, in its sole discretion, proposers that will be interviewed, and to select, in its sole discretion, the proposer that best meets the needs of the District and to initiate negotiations to engage that proposer.

The following are conditions precedent to final award of the contract(s): (a) successful completion of negotiations; (b) receipt by District of all of the documents required to be provided prior to execution of the contracts; and (c) any other conditions required by the District's Board of Trustees. Final award will be evidenced by execution of the agreement by the District's designee following any necessary approvals by the District's Board of Trustees.

D. MISCELLANEOUS

The individual or official of the proposing entity who has the authority to contractually bind the proposing entity must sign the RFP response.

The RFP response preparation and associated costs are the sole responsibility of the proposer and no proposer will be reimbursed by the District for any costs associated with responding to this RFP.

Proposals shall be submitted to the Contact Email. The proposing entity is entirely responsible for the means of delivering the Proposal to the appropriate individual on time.

Each proposer shall be solely responsible for examining this RFP and all its parts with appropriate care and diligence. Each proposer is also responsible for monitoring the information concerning this RFP and the procurement.

Each proposer agrees that the District shall be entitled to use all work product that is not returned to the proposer (including concepts, ideas, technology, techniques, methods, processes, drawings, and reports) contained in its proposal or generated by or on behalf of the proposer for the purpose of developing its proposal without compensation or consideration to the proposer, except such work product specifically labeled as a Trade Secret or Proprietary. By submitting a proposal, each proposer acknowledges that the District may incorporate and use such work product or concepts based thereon in the performance of its functions. The use of any of the work product by the District is at the sole risk and discretion of the District, and shall in no way be deemed to confer liability on the unsuccessful proposer. By submitting a proposal, each proposer acknowledges and agrees that it does not have the right to keep the contents of its proposal from being used by the District, as described herein.

Responses may be rejected if they do not provide the information requested herein in the format requested, or if submitted without all required information and signatures.

The District reserves all rights not otherwise specified within this RFP.

[END OF RFP DOCUMENT]

RFP Form A - CERTIFICATION

I certify that I have read the attached **Request for Proposals – Real Estate Asset Evaluation Services** and the instructions for providing a response. I further certify that I am authorized to commit the firm to the qualifications submitted.

Signature	Type or Print Name
Title	Company
Address	
Telephone	Fax
Date	

If you are responding as a corporation, please provide your corporate seal here:

All materials submitted in response to this RFP shall become the property of the Pittsburgh Unified School District.

RFP FORM B

PROPOSAL SUBMITTAL ACKNOWLEDGMENT
(Proposer to complete and return form with proposal)

Proposer: _____

Services Requested: **Real Estate Asset Evaluation Services**

Dear All:

The undersigned (“Proposer”) submits this Proposal in response to the RFP issued by the District, including any and all Addenda, to complete the work described in the RFP. Please note that initially capitalized terms not otherwise defined herein shall have the meanings set forth in the RFP.

By signing below, Proposer acknowledges receipt, understanding, and full consideration of all materials posted on the website including all Addenda. Proposer represents and warrants that it has read the RFP and agrees to abide by the contents and terms of the RFP.

Proposer further understands that all costs and expenses incurred by it in preparing a response to this RFP and participating in the Project procurement process will be borne solely by the Proposer.

This RFP shall be governed by and construed in all respects according to the laws of the State of California.

Name of Authorized Representative
of Proposer (Point of Contact): _____

Representative Title: _____

Entity Name: _____

Phone: _____

Fax: _____

Email: _____

Proposer’s business address, if different than Authorized Representative:

Address: _____

City: _____

State: _____

ZIP: _____

State or Country of
Incorporation/Formation/Organization: _____

By executing and submitting this form, the Proposer confirms that the Authorized Representative named above is authorized to act as agent on behalf of the Respondent with regard to this RFP.

Signature of Authorized Representative

Date: _____

RFP FORM C

**PREVIOUS DISQUALIFICATION, REMOVAL, OR OTHER
PREVENTION OF PROPOSING CERTIFICATION**

The Proposer shall complete, under penalty of perjury, the following questionnaire:

Has the Proposer or any major participant, any officer or any employee who has a proprietary interest thereof, ever been disqualified, removed, or otherwise prevented from proposing on, or completing a federal, state, or local government project because of a violation of law or a safety regulation? (Please circle one of the answers below)

YES

NO

If the answer is yes, explain the circumstances in the following space (or attach additional sheets as necessary):

Name of Proposer: _____

Signature of Proposer: _____

Date: _____