

# **EANES ISD REQUEST FOR PROPOSALS # 2016-0023 FOR REAL ESTATE CONSULTING/BROKER SERVICES**

## **Introduction:**

Eanes Independent School District is seeking proposals from qualified firms to provide Real Estate Consulting/Broker Services.

## **Instructions:**

### **Part I: Background Information and Process**

1. Information
2. District Overview
3. Proposal Due Date and Process Timeline
4. District Terms

### **Part II: Instructions to Firms**

1. Selection Process and Minimum Requirements
2. Required Proposal Format and Content

### **Part III: Required Submission Forms**

1. Felony Conviction Notification
2. Conflict of Interest Disclosure
3. W-9 Form
4. HB 1295 Instructions to Proposers

## **PART I: BACKGROUND INFORMATION AND PROCESS**

### **1. REQUEST FOR PROPOSALS SUMMARY**

Eanes ISD is seeking a consultant to assist in the potential purchase, sale or lease of sites in the District, plus consulting services to assist the District in coordination of due diligence and development feasibility. Respondents are not required to be engineers or real estate brokers.

### **2. DISTRICT OVERVIEW**

The Eanes Independent School District spans 31.2 square miles of scenic Texas Hill Country in Travis County and serves approximately 8,000 students. Schools in Eanes ISD are Westlake High School, Hill Country Middle School, West Ridge Middle School, Barton Creek Elementary, Bridge Point Elementary, Cedar Creek Elementary, Eanes Elementary, Forest Trail Elementary and Valley View Elementary. The District and all nine campuses achieved the highest rating, “Met Standard”, by the Texas Education Agency for 2014-15.

### **3. PROPOSAL DUE DATE AND PROCESS TIMELINE**

## **EANES ISD REQUEST FOR PROPOSALS # 2016-0023 FOR REAL ESTATE CONSULTING/BROKER SERVICES**

In order to be considered, companies are to submit three (3) original responses to the RFP by March 29, 2016 by 4:00 PM. Proposals shall be delivered in sealed envelopes to:

**Allyson Collins, General Counsel  
Eanes Independent School District  
601 Camp Craft Road Austin, Texas 78746**

### **RESPONSE TO RFP #2016-0023**

Interviews may be held at the District's discretion. Any final decision will be made by the Eanes ISD Board of Trustees.

All communications by potential proposers concerning this RFP must be directed to Allyson Collins, General Counsel, via email at [legal@eanesisd.net](mailto:legal@eanesisd.net). Trustees are not to be contacted regarding this solicitation.

#### **4. DISTRICT TERMS**

- The District reserves the right to accept or reject any or all Proposals.
- If no Proposals, or no acceptable Proposals are received by the deadline, the District reserves the right to keep this solicitation open and continue to receive sealed Proposals until such time that a Proposal is formally accepted by the Eanes ISD Board of Trustees.
- The District reserves the right to waive minor technical defects in a proposal, reject any and all proposal, reject any part of a bid, advertise for new proposals, or make the purchase on the open market if the product or service can be obtained at a better price.
- The District reserves the right to design the evaluation criteria to be used in selecting the best value.
- The District reserves the right to provide the final contract for mutual consideration and agreement.
- Federal and State laws, Local ordinances and Board policies apply to contracted services. No portion of any negotiated agreement may violate these laws, ordinances, and policies.

### **PART II: INSTRUCTION TO FIRMS**

#### **1. SELECTION PROCESS AND MINIMUM REQUIREMENTS**

Each company must meet the following minimum qualifications (company may not use sub-contractors to fulfill any obligations within its contract):

- Firm shall conform to the requirements listed in this request.
- The selected firm shall have the responsibility to ensure that services are provided to the District.
- Firm must be licensed to conduct business in the State of Texas.

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- It is preferred that the firm have experience for school districts within the last 5 years similar in nature to the scope of services requested herein.
- Firm must provide 5 total references, with school district references preferred.

### **2. REQUIRED PROPOSAL FORMAT AND CONTENT**

Three (3) bound copies should be submitted on 8 ½" by 11" paper, single sided, with consecutive page numbers.

The proposal should contain the following sections in the order presented below. Proposals that do not include these sections may be considered non-responsive and as such may not be considered.

Letter of Interest  
Profile and Experience  
Fee structure and rates  
References  
Insurance Coverages

#### **a. Section 1: Letter of Interest**

The proposal should be introduced with a letter of interest that includes a synopsis of the company's services and highlight the capacity to perform the work. The letter should be signed by the individual with contract signature authority for the company.

#### **b. Section 2: Profile and Experience**

Outline company history, scope of services offered, size of the firm, and location. The District is interested in the experience of the firm and/or the proposed project leaders in the areas listed below, particularly with school district clients. Please provide information regarding five (5) projects that have included services in these areas, and include in the narrative a description of your firm's experience in assisting clients with following items:

##### Land Purchases or Leases:

- Presentation of site options to a Board of Trustees
- Coordination with demographers
- Negotiation of post-closing development agreements with sellers/developers
- Negotiation with counties, municipalities, utility districts and other authorities having jurisdiction to coordinate for utility capacity, access, drainage, environmental compliance requirements, zoning and platting requirements
- Coordination with architects and engineers for site feasibility, access, utilities and drainage
- Coordination with surveyors, environmental consultants and other testing/inspection companies

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### Land Sales or Leases

- Experience guiding school districts through statutory requirements for land sales or leases
- Negotiation of sale or lease agreements for school districts

Projects must have been completed within the last five (5) years.

Identify key personnel with a description of related work experience, education, training, and any other pertinent data that would demonstrate competence and experience in this type of work, including past experience with school districts.

Identify the project's principal contact and contact information.

### **c. Section 3: Fee Structure and Rates**

Please provide the fees and rates that the firm will require on both potential sales of District owned property as well as for the purchase of property for the District. Please also include fee structures and rates for leases, where the District is either the lessor or lessee.

### **d. Section 4: References**

Five project references must be provided for clients, preferably school district clients. These projects must have been engaged during the last five years. Use the format below.

Reference Organization	Contact Name	Phone Number	Project Completion Date
1.			
2.			
3.			
4.			
5.			

### **e. Section 5: Certificate of Insurance Coverages:** Please provide a copy.

## **Part III: Required Certification Forms**

1. Felony Conviction Notification - see attached form
2. Conflict of Interest Disclosure - <https://www.ethics.state.tx.us/forms/CIQ.pdf>
3. W-9 Form - <https://www.irs.gov/pub/irs-pdf/fw9.pdf>
4. HB 1295 Instructions to Proposers - <https://www.ethics.state.tx.us/tec/1295-Info.htm>

**Eanes Independent School District**  
601 Camp Craft Road, Austin Texas 78746

**FELONY CONVICTION NOTICE**

Senate Bill 1 passed by the State of Texas Legislators, Section 44.034, Notification of Criminal History, Subsection (a) states “a person or business entity that enters into a contract with a school district must give advance notice to the district if the person or owners or operator of the business entity has been convicted of a felony. The notice must include a general description of the conduct resulting in the felony”

Subsection (b) states “a school district may terminate a contract with a person or business entity if the District determines that the person or business entity failed to give notice as required by Subsection (a) or misrepresented the conduct resulting in the conviction. The district must compensate the person or business entity for services performed before the termination of the contract”. This disclosure is not required of a publicly-held corporation (option A).

I, the undersigned agent for the firm named below, certify that the information concerning notification of felony conviction had been reviewed by me and the following information furnished is true to the best of my knowledge (select one answer).

Vendor's Name: \_\_\_\_\_

Authorized Company Officer's Name: (please print) \_\_\_\_\_

Title: \_\_\_\_\_

**A.** My firm is a publicly-held corporation; therefore, this reporting requirement is not applicable.

Signature of Company Officer: \_\_\_\_\_

**B.** My firm is not owned nor operated by anyone who has been convicted of a felony.

Signature of Company Officer: \_\_\_\_\_

**C.** My firm is owned or operated by the following individual(s) who has/have been convicted of a felony (list names and titles):

\_\_\_\_\_

\_\_\_\_\_

Details of Conviction: \_\_\_\_\_

\_\_\_\_\_

**ALL VISITORS TO ANY EANES ISD BUILDING WILL BE REQUIRED TO PRESENT A PICTURE ID AND BE ENTERED INTO THE VISITOR MANAGEMENT SYSTEM IN ORDER TO RECEIVE A VISITOR'S PASS. NO VISITOR WILL BE ALLOWED ENTRY WITHOUT A VISITOR'S PASS.**

Signature of Company Officer: \_\_\_\_\_