



REAL ESTATE BROKER SERVICES : DUPLEXES Request For Proposal #2018-53 October 30, 2018

Electronic Submittals are due by 2:00 PM on November 21, 2018

Everett Housing Authority (EHA) is requesting proposals from Licensed Commercial Real Estate Brokers to provide commercial real estate services for the sale of EHA's Scattered Sites duplexes located throughout Everett. The properties consist of 15 duplexes with 30 units consisting of 2 two-bedroom units in 1 duplex, 26 three-bedroom units in 13 duplexes and 2 four-bedroom units in 1 condominiumized duplex.

EHA desires to sell the entire portfolio of duplexes to a single buyer. The property may be conveyed with the existing tenants leasing in place with most receiving subsidies funded by Tenant Protection Voucher (subject to each family qualifying).

The Real Property interest will be conveyed fee simple and unencumbered from rental and income affordability restrictions.

Firms interested in providing such service to the Everett Housing Authority (HA) must complete and submit a statement that substantiates or presents evidence of that firm's abilities and expertise in the areas defined in the selection criteria section of this document.

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<p><i>Fillable Forms</i> Fillable forms can be found on our website at www.evha.org * <i>Doing Business with EHA</i> **<i>Universal Bid Documents</i></p>		

1. BACKGROUND

The Everett Housing Authority is a municipal corporation, created in 1942 by Washington State Law (RCW35.82) and City of Everett Council resolution, to provide rental housing and related services to lower income and disabled persons. EHA is governed by a six-member Board of Commissioners, appointed by the Mayor of the City of Everett and confirmed by City Council. The Executive Director is appointed by and reports to the Board and provides direction to staff and management.

EHA is currently a familiar and respected name in the management and development of low-income housing apartments for over seventy-five years. EHA is a high performing public housing agency known for its strong and innovative management, maintenance, and capital programs.

2. HA'S RESERVATION OF RIGHTS

The HA reserves the right to reject any or all proposals, to waive any informality in the RFP process, or to terminate the RFP process at any time, if deemed by the HA to be in its best interests.

- 1.2 The HA reserves the right not to award a contract pursuant to this RFP.
- 1.3 The HA reserves the right to terminate a contract awarded pursuant to this RFP, at any time for its convenience upon 30 days written notice to the successful proposer(s).
- 1.4 The HA reserves the right to determine the days, hours and locations that the successful proposer(s) shall provide the services called for in this RFP.
- 1.5 The HA reserves the right to retain all proposals submitted and not permit withdrawal for a period of 60 days subsequent to the deadline for receiving proposals without the written consent of the HA Contracting Officer (CO).
- 1.6 The HA reserves the right to negotiate the fees proposed by the proposer entity.
- 1.7 The HA reserves the right to reject and not consider any proposal that does not meet the requirements of this RFP, including but not necessarily limited to incomplete proposals and/or proposals offering alternate or non-requested services.
- 1.8 The HA shall have no obligation to compensate any proposer for any costs incurred in responding to this RFP.
- 1.9 The HA shall reserve the right at any time during the RFP or contract process to prohibit any further participation by a proposer or reject any proposal submitted that does not conform to any of the requirements detailed herein. By accessing the HA's website and by downloading this document, each prospective proposer is thereby agreeing to abide by all terms and conditions listed within this document and further agrees that he/she will inform the CO in writing within 5 days of the discovery of any item listed herein or of any item that is issued thereafter by the HA that he/she feels needs to be addressed. Failure to abide by this time frame shall relieve the HA, but not the prospective proposer, of any responsibility pertaining to such issue.
- 1.10 The HA will reject the proposal of any Offeror who is debarred by the U.S. Department of Housing and Urban Development (HUD) from providing services to public housing agencies and reserves the right to reject the proposal of any Offeror who has previously failed to perform any contract properly for the HA.
- 1.11 The HA reserves the right to schedule interviews with two or more of the highest scoring firms. Firms that are interviewed will receive up to an additional 30 points based upon the outcome of their interview. The HA will select the firm with the highest amount of total points.

- 1.12 The HA and the selected firm will negotiate the terms and conditions of the professional services contract. The HA reserves the right to modify the scope of work and expand or modify the terms and conditions specifically set forth in this RFP. In the event the HA and the selected firm are not able to reach agreement on contract terms and conditions acceptable to both parties, the HA reserves the right, at its sole discretion, to enter into negotiations with the next highest -rated firm(s) and will be relieved of any obligation to negotiate with or contract for services from the selected firm(s).

3. **SERVICES TO BE PROVIDED**

- a. The selected Broker shall be asked to perform the following tasks:
- i. The selected Broker, in consultation with EHA staff and outside consultants, shall conceive, develop and implement a plan to market the properties to developers and/or potential buyers consistent with EHA's financial and policy objectives.
 - ii. The selected Broker Shall analyze and present all offers from qualified buyers that reasonably respond to EHA's goals.
 - iii. The selected Broker Shall be responsible for, but not be limited to the following:
 1. Effectively communicate with potential buyers, the goals, objectives and requirements for redevelopment if applicable;
 2. Aggressively market the properties to qualified buyers I developers;
 - a. Provide EHA staff with market analysis as appropriate;
 - b. Prepare regular reports for the purpose of updating, summarizing, and tracking market activity for EHA staff, review and respond to inquiries, and making any appropriate adjustments in strategy;
 - c. In a timely manner, thoroughly analyze and present all offers from potential buyers to EHA staff including written reports and recommendations;
 - d. Assist in the negotiation of purchase offers;
 - e. Prepare and present on EHA's behalf, any counter-offers or addenda to potential purchasers;
 - f. Provide information and documents necessary for Escrow in preparation for closing in conjunction with EHA staff;
 - g. Serve as the communications liaison between EHA, the Purchaser and the Purchaser's agent;
 - h. Provide frequent updates on the status of EHA's real estate transactions on at least a monthly basis;
 - i. Make timely confirmation of all real estate transactions.
 - j. Broker will ensure the following items are included in all purchase and sale agreements:
 - i. A qualified financial offer from buyer/buyers with evidence of the financing necessary to complete the purchase;
 - ii. The sale of the Property shall be "as is", without warranties of any kind;
 - iii. A non-refundable earnest money deposit in the amount not less than 2% of the purchase price, to be applied to the final transaction and sale.
 - iv. In consultation with EHA staff, the selected Broker Shall develop evaluation criteria to help assess purchase offers.

4. **Items to be addressed in proposal:**

- a. **Criterion 1: EHA fillable Forms**, can be found on our website at www.evha.org
 - i. Section 3 Vendor Preference and
 - ii. WMBE Report
- b. **Criterion 2: Qualifications and Expertise of Firm**
 - i. Provide a brief overview of the management structure of the Project Team, listing the general responsibilities of all levels of management, including the names and titles of the key personnel who would be assigned to provide these services. You may also include an organizational chart for clarification.
 - ii. Provide the roles and responsibilities to be assigned to the Project Team's key personnel;
- c. **Criterion 3: Project Team's Experience as Relates to this RFP**
 - i. Describe successful projects of a similar nature completed by your team members.
 - ii. Identify and describe at least three (3) completed relevant transactions that your Project Team has performed in the past five (5) years, including the locations, acreage, buildings' square footage, and relationships with purchasers and sellers. Please describe your Project Team's role(s) in these transactions.
- d. **Criterion 4: Key Personnel Experience as Relates to this RFP**
 - i. Describe the role(s) of your Project Team's identified key personnel in the transactions identified in Criterion 2 above and describe why and how they are uniquely qualified to perform the work under this contract.
 - ii. Provide resumes for the key personnel named in your response.
- e. **Criterion 5: Marketing Program and Personnel**, as evidence of an active, engaging marketing strategy:
 - i. Provide a market overview for this type of property in this sub-market;
 - ii. Articulate your firm's and any named sub-consulting firm(s)' strategic approach to marketing residential property throughout the City. This should include a general marketing strategy, likely marketing timelines, firm's presence in this sub-market, ability to identify pools of potential buyers, and specific strategies to reach these buyers;
 - iii. Describe your firm's and any named sub-consulting firm(s)' ability to create pertinent market information and create marketing tools that will support the overall marketing plan for EHA. Include/provide examples of relevant marketing tools and materials;
 - iv. Identify your and/or any named sub-consulting firm's personnel that would be responsible for providing the requested marketing services requested under this RFP and their role(s) in this endeavor. If this information was provided under Criterion 3 above, please so indicate;
- f. **Criterion 6: Broker's Commission Schedule**
 - i. Provide a detailed proposed commission schedule for the performance of the services requested under this RFP and other services requested in the Scope of Work above or identified by you. Address the fee schedule for buyers brought by outside brokers as well as buyers found by EHA.
- g. **Criterion 7: Include a list of at least three letters of references for whom the firm or team members have performed similar work in the last five years (including agency or business name of client, contact person, address, telephone number and e-mail address if available.)**
- h. **Criterion 8: EHA Required Forms:**
 - i. Vendor Information Form;

- ii. W-9 Form;
- iii. Insurance Requirement: - **This is for informational purposes only.** This is not part of the submittal requirements. You will only need to provide this if you are awarded the project.

Fillable forms can be found on our website at www.evha.org

i. **If necessary: Interview (20 points)**

- i. Clarification of items in submitted proposal;
- ii. Quality of interview
 - Ability of firm(s) to present complex issues in a concise and understandable manner;
 - Well developed, thoughtful approach to undertaking and managing this type of project;
 - Quality of comment and feedback on proposed development, ownership, management and financing plan;
 - Team organization, and identification of responsible Project Manager(s);

5. **QUESTIONS REGARDING THIS REQUEST**

- 1) Questions regarding this RFP should be addressed in writing, to **Brenda McLeod, Assistant Director of Procurement and Contracts, Everett Housing Authority, 3107 Colby Avenue, Everett, WA 98201** or email to brendam@evha.org Questions will be accepted until 4:30 PM on **November 8, 2018**. Questions will be answered by the following day, but no later than November 14, 2018.

6. **SUBMITTAL PROCEDURES**

Only emailed submittals will be accepted, they must be delivered in one (1) email, with no late section submittals or changes after initial receipt of the packet, with the subject line of the email clearly stating that this is a "Company Name--Submittal for Real Estate Broker Services-Single Family: Project 2018-53" to submittals@evha.org.

Responses shall contain information in the following criteria tabbed order as listed. EHA reserves the right to waive any irregularities in the submission package and process.

Companies interested in submitting a response to this RFP/Q should develop a submittal that best illustrates their expertise in the areas identified in the selection criteria.

7. EVALUATION PROCESS

The selection process for this project is as follows:

- EHA will review consultants' proposals, and check references;
- EHA will generate a short-list of qualified consultants;
- EHA's evaluation panel will make recommendations to the Board of Commissioners for final approval;

8. EVALUATION CRITERIA/SUBMITTAL PACKET

- Firms interested in submitting a response to this RFQ should develop a submittal that best illustrates their expertise in the areas identified in the selection criteria below.
- Responses shall contain information in the following criteria tabbed order as listed by the chart below.
- There are 120 total points possible in the evaluation process, plus 20 points for interview if selected.

Criteria Tabbed Order	Evaluation Criteria - Qualifications	Weighting (Max Points)
1	Section 3 Vendor Preference and Women and Minority Business Enterprise (WMBE) Report	10
2	Project Team's Qualifications and Expertise	15
3	Project Team's Experience as Relates to This RFP	15
4	Project Team's Key Personnel Experience as Relates to This RFP	20
5	Marketing Program and Personnel	25
6	Broker's Commission Schedule	15
7	Letters of Reference	15
8	EHA's Required forms	5
	Maximum Total Points	120

EXHIBIT "A"

Type	Phase	Bedrooms	Bath	Address	Sum of Square Footage	Sum of 2018 Appraised Value	
Duplex	Investor	2	1	1907 CHESTNUT ST	1,996	380,000	
		3	1	1203 103RD PL SW	1,938	450,000	
				1221 103RD PL SW	1,938	450,000	
			2	1220 103rd PL SW	1,974	455,000	
				2028 CHESTNUT ST	2,252	445,000	
				2032 CHESTNUT ST	2,252	445,000	
				608 58TH PL SE	2,092	465,000	
				614 58TH PL SE	2,284	465,000	
				620 58TH PL SE	2,284	465,000	
				623 58TH PL SE	2,092	460,000	
				6518 FLEMING ST	2,324	480,000	
				712 60TH ST SW	2,380	475,000	
				727 60TH ST SW	2,604	495,000	
				728 60TH ST SW	2,604	490,000	
			4	2	13716 9TH AVE W	1,452	350,000
					13718 9TH AVE W	1,452	350,000
	Investor Total					33,918	7,120,000
Duplex Total					33,918	7,120,000	
Grand Total					33,918	7,120,000	

End of RFP 2018-53