

**REQUEST FOR QUALIFICATIONS
PROPERTY MANAGEMENT SERVICES**

The San Bernardino City Unified School District (“District”) is requesting statements of qualification (SOQ) from qualified consulting firms to provide property management services for various properties purchased to construct new school campuses. The minimum qualification requirements are as follows: 1) Firm must provide State of California, Department of Real Estate Broker’s License, 2) Firm must have experience managing properties, and 3) Firm must have bonded (Fidelity Bond) personnel to handle monies and financial data. Request for Qualifications #63 for Property Management Services (“RFQ 63”) is available by e-mail, in person at the address below, or from the District’s Facilities Department web site: www.sbcusdfacilities.com. A non-mandatory pre-proposal meeting will be held on October 16, 2009 at 10:00 a.m. at the address indicated below. One (1) original and three (3) copies of the SOQ must be received at the address indicated below on or before October 27, 2009, 4:00 p.m. to be considered. All local firms that meet the qualifications in the RFQ are encouraged to submit SOQs.

SAN BERNARDINO CITY UNIFIED SCHOOL DISTRICT
Facilities Management Department
956 W 9th Street
San Bernardino, California 92411
Tel: 909-388-6100
susan.mckee@sbcusd.k12.ca.us



**REQUEST FOR QUALIFICATIONS
#63
REAL PROPERTY MANAGEMENT SERVICES
SAN BERNARDINO CITY UNIFIED SCHOOL DISTRICT
FACILITIES MANAGEMENT DEPARTMENT**

OCTOBER 8, 2009

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1. OVERVIEW

The San Bernardino City Unified School District (“District”) is requesting statements of qualifications from consulting firms to provide property management services for various properties purchased for the District’s Facilities Capital Improvement Program to construct new schools. Property management services are required to manage the properties on behalf of the District prior to demolition of the existing buildings and possibly until new school construction begins.

The property management services may include, but are not limited to, property inspections, collections/accounting, maintenance, and property access management. The properties include vacant land, single family dwellings, multi-family dwellings, and commercial buildings mostly within the City of San Bernardino across 8 project sites identified for new campuses. There are approximately 250 parcels of land included in the project areas. Some properties will be occupied and others will be vacant. Specific services are defined in Exhibit A attached to this RFQ.

The District will select one firm to perform these services and will award master service agreement to the selected firm with an initial two year base term and three one-year extensions to be renewed at the District’s discretion. Upon award of the master service agreement and as the District identifies properties which require property management services, a work order called an Assignment of Project (“AOP”) will be issued by the District. The AOP will show a total not-to-exceed cost and line items that specify the services to be provided by the Consultant. The District anticipates issuing numerous AOP’s in order to meet the overall needs of its Facilities Capital Improvement Program.

2. STATEMENT OF QUALIFICATIONS DUE DATE AND TIME

In order to be considered, one (1) unbound original and three (3) bound copies of the statement of qualifications must be received by the District at the address stated in Paragraph 3 herein below by personal delivery or by U.S. Mail by the following date and time: **October 27, 2009, 4:00 p.m.**

Statement of qualifications will be date and time stamped upon receipt by the District. The District reserves the right to reject any statement of qualifications received after the deadline stated immediately above.

3. CONTACT PERSON AND ADDRESS FOR SUBMISSION OF STATEMENT OF QUALIFICATIONS

Interested, qualified firms and persons (collectively referred to as “Consultants”) are invited to submit statement of qualifications to the following contact person and address:

Susan McKee, Facilities Business Outreach Manager
Facilities Management Department
SAN BERNARDINO CITY UNIFIED SCHOOL DISTRICT
956 W 9th Street , San Bernardino, California 92411

Tel: 909-388-6100 * Fax: 909-885-9991 * Email: susan.mckee@sbcusd.com

4. SELECTION PROCESS AND MINIMUM REQUIREMENTS

The District intends, through this RFQ, to select one firm that is qualified to provide property management services for various projects based on the selection criteria included herein. The District will at its sole discretion, enter into negotiations for a master service agreement with the selected firm. Upon the completion of the selection process, the District shall notify the firms of the final selection.

Each firm must meet the following minimum qualifications (firms may not use subconsultant experience to meet the minimum requirements):

- Firm must provide State of California, Department of Real Estate Broker's License (attach copy)
- Firm must have experience managing properties
- Firm must have bonded (Fidelity Bond) personnel to handle monies and financial data

5. REQUIRED STATEMENT OF QUALIFICATIONS FORMAT AND CONTENT

5.1 Statement of qualifications Format Requirements. Statement of qualifications – one (1) unbound original and three (3) bound copies should be submitted on 8 ½” by 11” paper, single-sided, with consecutive page numbers. Tabs that correlate to the mandatory sections identified below must be used.

5.2 Content and Order of Statement of qualifications and Selection Criteria. The statement of qualifications should contain the following sections in the order presented below. Consultants are instructed to note the numerical scoring which will be used to rank the short-listed firms. Statement of qualifications that do not include these sections may be considered non-responsive and as such may not be considered.

<u>Section Title</u>	<u>Score</u>
Section 1 - Letter of Interest	5
Section 2 - Consultant Firm Profile and Experience	45
Section 3 - Consultant Staff Experience and Action Plan	40
Section 4 - Fees	5
Section 5 - Litigation History	5
Total Possible	100

Section requirements are as follows.

Section 1: Letter of Interest

The statement of qualifications should be introduced with a Letter of Interest that includes a synopsis of the consultant firm's services and highlight the firm's capacity to perform the work. The letter should be signed by the individual with contract signature authority for the firm.

Section 2: Consultant Firm Profile and Experience

Complete Form A– Consultant Firm Profile and Experience Matrix (attached)

Section 3: Consultant Staff Experience and Action Plan

Submit resumes for the each property management professional that the Consultant will assign to the District's projects. This should include only management personnel that the firm proposes to assign to the District – those individuals who will be the direct contacts to tenants and/or owners of the properties and to the District. Include the following data and any other information for each professional person that the Consultant deems relevant:

- (1) Years of experience in providing property management services
- (2) Education and Professional registrations (indicate State of California, Department of Real Estate License ID), certifications and affiliations
- (3) Indicate the quantity, locations and types of properties managed by the staff member over the past 3 years
- (4) Indicate bilingual staff and languages spoken
- (5) a) Describe experience and b) Provide a detailed action plan regarding collection of delinquent and unpaid rents up to but not including small claims action;

Section 4: Fees

Acknowledge acceptance of the SBCUSD Schedule of Fees for Property Management Services (Exhibit B attached) for payment. Contract signature authority for the firm shall sign and date the exhibit and include in this section of the consultant's proposal.

Section 5: Litigation History

List all litigation in the last five (5) years, filed against the Consultant or Consultant's employees. State the beginning and end date, of each lawsuit, case or proceeding and the judgment or resolution or anticipated judgment or resolution.

6. *REQUESTS FOR INFORMATION, PRE-PROPOSAL MEETING:*

A non-mandatory pre-proposal meeting is scheduled Friday, October 16, 2009 at 10:00 a.m. at the address indicated in item 3.

Questions about the Request for Statement of qualifications ("RFQ") process or the District's Facilities Capital Improvement Program must be received in writing (preferably via email) by noon, October 19, 2009 and directed to the contact person as indicated in item 3. The response

to all inquiries and RFI's will be tabulated in a Q/A format and posted on the District's websites by end of business on October 21, 2009. The District website addresses are as follows:

Facilities website:

<http://www.sbcusdfacilities.com/procurement/RFQ.cfm>

District's main website:

<http://ca-sanbernardinioschools.civicplus.com/Bids.aspx?CatID=16>

7. SCOPE OF SERVICES, FEE SCHEDULE

Services will include but not necessarily be limited to those services set forth in Exhibit A – Draft Scope of Services herein attached. Fees for those services are as set forth in Exhibit B – SBCUSD Schedule of Fees for Property Management Services also herein attached.

8. DISTRICT POLICIES REGARDING SUBMISSIONS OF STATEMENT OF QUALIFICATIONS

8.1 No Reimbursement. The District will not reimburse Consultants for costs that they incur in preparing their statement of qualifications.

8.2 Right to Request Additional Information. The District reserves the right to request additional information from the Consultants in order to make a fully informed decision regarding selection of the Consultants.

8.3 Right to Reject. The District reserves the right to reject any and all statement of qualifications.

8.4 Independent Contractor. Consultants hired by the District as a result of this RFQ will be independent contractors and not employees of the District.

8.5 Insurance Requirements. Although not required for the statement of qualifications, Consultants must meet the District requirements for insurance coverage and provide the following coverage (limits to be defined at execution of master service agreement):

- Worker's Compensation
- General Liability
- Automobile Liability
- Bonding for collections/accounting services

8.6 Disabled Veterans Business Enterprise. Prior to, and as a condition precedent for final payment under any contract for the subject services, the Consultant shall provide appropriate documentation to the District, identifying the amount paid to disabled veteran business enterprises in connection with the Consultants performance of the agreement, so that the District can assess its success at meeting this goal. In accordance with Education Code Section 17076.11, this District has a participation goal for disabled veteran business enterprises of at least three (3) percent per year of the overall dollar amount of funds allocated to the District by the State Allocation Board pursuant to Leroy F. Greene

School Facilities Act of 1998 for construction or modernization of school facilities and expended each year by the District.

EXHIBIT A – DRAFT SCOPE OF SERVICES

Specific services required will be detailed in the District Assignment of Project (AOP) Work Orders that identify the needs of parcels within a project. Consultant may need to coordinate with District Project Manager, relocation consultant, land acquisition consultant, environmental consultant and other District authorized representatives. Generally, the scope of work shall include but not be limited to the following.

LAND PARCELS WITH NO BUILDINGS

Land parcels with no buildings shall be defined as properties acquired by the District which have no residential or other buildings. For these properties, Consultant shall provide the following:

Land Parcels with No Buildings - Scope of Work Summary	
Property Inspections	
1	Perform monthly drive-by inspections of all properties, photo document conditions of properties
2	Prepare and issue monthly report of inspections (with photos) and note any issues that require attention (i.e. vandalism, property repairs, etc.)
Maintenance	
3	Coordinate maintenance with District vendors where applicable for board-up, fencing, weed abatement, security, and other services.
Property Access	
4	Provide Property Access to District Consultants for environmental testing/inspections and other access as required
5	Coordinate with local code enforcement agencies as required
Property Liaison	
6	Serve as contact for day to day operations to handle any maintenance or emergency issues regarding the property.

VACANT PROPERTIES

Vacant properties shall be defined as properties with residential or commercial buildings which are not occupied by a tenant or former owner. For these properties, Consultant shall provide the following:

Vacant Properties - Scope of Work Summary	
Property Inspections	
1	Perform weekly inspection of all properties, photo document condition of properties by project area;
2	Prepare and issue monthly report of inspections with photos and identifying issues observed, actions taken to address issues (i.e. vandalism, repairs, etc.), action required by the District;
Maintenance	
3	All maintenance and repairs to be approved by the District, prior to start of work. Coordinate repairs and maintenance whether performed by Property Manager's staff, District vendors or M&O staff;
4	Follow-up with various utilities for any disconnect or service termination not completed by the previous property manager
Property Access	
5	Provide property access to utility service providers and District consultants for environmental testing, sampling or surveying and others requiring authorized access to property;
Property Liaison	

Vacant Properties - Scope of Work Summary	
6	Coordinate with local code enforcement, District security service, school police and local police, as required
7	Pursue the collection of unpaid and delinquent rents not collected by the previous property manager up to but not including filing of small claims litigation;
8	Coordinate with relocation consultant regarding the payment of relocation benefits;
9	Serve as primary point of contact for day to day operations and emergency issues regarding the repair, maintenance and access to the properties.

TENANT PROPERTIES

Tenant properties shall be defined as properties with residential or commercial buildings which have tenant occupants or former owners. For these properties, Consultant shall provide the following:

Tenant Properties - Scope of Work Summary	
Property Inspections	
1	Perform monthly drive-by inspections of all properties, photo document conditions of properties
2	Prepare and issue monthly report of inspections (with photos) and note any issues that require attention (i.e. vandalism, property repairs, etc.)
3	Coordinate with District Relocation Consultant to obtain keys upon move-out and to document property conditions.
Collections/Accounting	
4	Provide bonded personnel to handle monies and financial data
5	Issue, execute and terminate rental agreements per District direction
6	Collect and enforce timely payments of monthly rent
7	Deposit handling
8	Provide legal notices regarding Property Management executed leases to tenants
9	Coordinate and support eviction of tenants if required
10	Provide monthly statements on rent collections and disbursements per project
11	Pay any utilities, maintenance expenses required
12	Disbursement of rents to the District
13	Setup brokers trust account for rental income
14	Set up a special maintenance reserve account to fund authorized repairs
Maintenance	
15	Coordinate 24-hour, 7-days-a-week responses for maintenance or emergencies on properties with tenants or former owner occupants.
16	Coordinate maintenance with District vendors where applicable for board-up, fencing, weed abatement, security, and other services.
Property Access	
17	Provide Property Access to District Consultants for environmental testing/inspections and other access as required
18	Key management services during occupancy
19	Coordinate all utility disconnections after tenants vacate properties
20	Coordinate with local code enforcement agencies as required
Property Liaison	
21	Serve as contact for day to day operations with tenants and/or neighbors to handle any maintenance or emergency issues regarding the property.

Exhibit B

SBCUSD
PROPERTY MANAGEMENT SERVICES
SCHEDULE OF FEES

REAL PROPERTY MANAGEMENT SERVICES	
TYPES OF SERVICES	FEES FOR SERVICES (per property)
Tenant Occupied Units/Properties ¹	\$60 per month
Owner Occupied Properties ²	\$50 per month
Vacant Properties ³	\$100 lump sum
Vacant Properties ⁴	\$10 per month
Routine Maintenance by Property Managers	At Service Repair Price List
Routine Maintenance by Outside Contractor	At cost with 10% mark-up
Serving legal notices and other District correspondences by the Property Manager	Included in the monthly rate
Notice Servicing by Outside Service Agency	\$25 per notice served
Evictions – Uncontested	\$584 per property
Evictions – Contested	Additional \$175 per property

¹ Tenant Occupied is defined as a discrete entity holding a lease agreement. The tenant occupied fee is calculated per lease agreement. The monthly rate shall cease upon tenant vacancy or evictions.

² Fees for Owner Occupied Properties shall commence when lease payments begin. No charge unless lease payments are being made. The monthly rate shall cease upon owner vacancy or evictions.

³ The lump sum fee for Vacant Properties shall be paid when billing for utilities is terminated and service is terminated with meters and lines disconnected and removed from the property to the street.

⁴ The per month fee for Vacant Properties shall be paid after property is vacant. The monthly rate shall cease upon owner notice.

⁵ Property Manager may make repairs up to \$150 with advanced District approval. Repairs over \$150 require three quotes and District authorization in advance of performing the repair. Emergency Repairs approvals shall be handled by directly contacting the District Pre-Construction Project Manager. The Property Manager's Service Repair Price List is incorporated herein and made a part thereof of this Agreement.

Acknowledgement and Acceptance of SBCUSD Property Management Schedule of Fees,

BY:

Name of Firm

Authorized Signature

Name

Title

Date

**REQUEST FOR PROPOSALS FOR
PROPERTY MANAGEMENT SERVICES**

FORM A - CONSULTANT FIRM PROFILE AND EXPERIENCE

Firm Name:	
Firm Address:	
Firm Phone:	Firm Fax:
Primary Contact Name/Title:	Primary Contact Email:
Years in Business Providing Property Management Services:	
Bonding Company:	Bonding Capacity: \$
State of California, Department of Real Estate Broker's License ID:	
Type of Business: (Check Box)	
<input type="checkbox"/> Sole Proprietorship	<input type="checkbox"/> Joint Venture
<input type="checkbox"/> Partnership	<input type="checkbox"/> Other:
<input type="checkbox"/> Corporation	
Employees	
Number of Current Employees including Management:	
Total # of Property Managers:	
Total # of Certified Property Managers (Institute of Real Estate Management):	
Service Experience	
1. Total # of Properties Providing Property Management Services:	Total # of Units:
2. Total # of Properties Currently Managed in Cities of San Bernardino/Highland:	
3. Total # of Properties Currently Managed by Type:	
Single Family Dwellings:	Multi-Family Dwellings:
Commercial:	Industrial:
Other (Describe -):	
4. Does your firm provide maintenance services with in-house staff? Yes: <input type="checkbox"/> or No: <input type="checkbox"/>	
a. If yes above, please note the maintenance services provided with in-house staff:	
5. Does your firm have experience in managing Section 8 or other government housing funding programs? Yes: <input type="checkbox"/> or No: <input type="checkbox"/>	
a. If yes above, please describe and quantify experience:	
Client References (Indicate at least three references of current clients for which the firm is managing residential properties in the Cities of San Bernardino and/or Highland)	
Reference 1:	
Property Owner:	Phone Number:
Number of Properties Being Managed:	
Description of Services Provided:	
Reference 2:	
Property Owner:	
Number of Properties Being Managed:	
Description of Services Provided:	

Reference 3:

Property Owner:

Number of Properties Being Managed:

Description of Services Provided: