



REQUEST FOR PROPOSAL

1. Overview

This document is a Request for Proposal (“RFP”) for Commercial Real Estate Brokerage Services in Oakland, California.

American Indian Model Schools (AIMS) is an independent public charter system authorized by the Oakland Unified School District serving students grades K-12. The school operates one elementary school, two middle schools and one high school. The schools operate under a Board of Directors who have authority over the governance of the schools.

American Indian Model Schools is seeking proposals from licensed commercial real estate brokerage firms (“vendors”) with experience in providing commercial real estate brokerage and advisory services to users on large-scale commercial leasing and purchase transactions. The selected vendor will be retained to represent AIMS in its pursuit in usable square footage of a K-12 campus to house its public charter schools and central operations. AIMS is considering both purchase, trade and lease options.

As a practical matter the brokerage services agreement will likely terminate once this particular transaction is completed. For contracting purposes, however, the initial contract will be for 2 years.

Vendor also certifies that it does not discriminate against any employee or applicant for employment on the grounds of race, age, color, national origin, religion, sex, gender, disability, genetic information, or any other classification protected by Federal, California State constitutional, or statutory law; and does not and will not maintain or provide its employees any segregated facilities at any of its establishments.

American Indian Model School offers educational and employment opportunities without regard to race, age, color, national origin, religion, sex, gender, disability or genetic information.

Please submit six (6) hard-copies of your proposal and one (1) .pdf copy, no later than 12:01 AM on September 30, 2018 to:

Superintendent’s Office
American Indian Schools
171 12th Street
Oakland, California 94607

2. BUILDING REQUIREMENTS:

- A. The building shall be brought up to 100% accessibility due to the change of the use (occupancy classification) including, but not limited to, the following:
- a. Path of travel from public right away to the building and to all handicapped accessible parking spaces;
 - b. Access throughout the building; and
 - c. Restrooms
- B. Based on actual site conditions, to be determined, the building may need to be upgraded, including but not limited to, the following:
- a. Smoke detectors;
 - b. Exit signs; and
 - c. Emergency lights.

3. ENGINEERING DEPARTMENT:

- A. Accessible parking facilities shall be in compliance with the American Disabilities Act, California Building Code, and City Standards. A handicap path of travel needs to be shown on a site plan from the right of way to the place of business and to and from all handicapped accessible spaces.
- B. Landscaping, drainage, LID improvements and compliance with city requirements including all finish grades, slopes, dimensions, striping, and signage.
- C. Turn lane extension, traffic improvements, per City of Oakland August 2018 traffic study.
- D. Curb, gutter, and sidewalk installation.
- E. Site preparation and paving.
- F. Tenant improvements to existing building.

Selection Criteria for Vendors/Contractors:

Contractors/Vendors should possess the ability to perform successfully under the terms and conditions of the activities described above. The following will be considered:

- Qualifications
- Licensing
- Compliance with public policy
- Record of past performance
- Financial and technical capacity

Scope of Work

- a. Vendor Minimum Requirements

American Indian Model Schools will accept and evaluate proposals only from vendors that meet ALL of the following requirements:

1. **Licensing:** All real estate professionals who will be assigned to AIMS account must be real estate brokers ("brokers") licensed pursuant to Business and Professions Code §10130 et seq. and in good standing in the State of California as of August 28, 2018 and throughout the term of the contract. Only one submittal will be accepted from each firm, organization or company.
2. **Vendor Profile:** Vendors must provide real estate brokerage services to Oakland, California area commercial clients from an office within Alameda County. Only one submittal will

be accepted from each firm, organization or company; competing “branch” offices or competing teams from the same corporate entity may not submit separate proposals.

3. **Broker Experience:** The account executive(s)/lead brokers who will be assigned to the AIMS account must each have a minimum of 3 years successful experience in securing sites for schools or other non-profit agencies.

4. **Conflict of Interest:** The brokers who will be assigned to the AIMS account must not currently have a listing engagement with the AIMS current landlord, realty or any of AIMS’ current buildings.

Scope of Services to be Provided Under the Contract

1. The selected vendor will be responsible for providing support to the AIMS staff and Board in analyzing, negotiating, and closing on the lease and/or purchase of suitable office space for the AIMS’ charter school operations.
2. The principal responsibilities of the selected vendor shall be to identify and qualify potential buildings; conduct due diligence on each building; solicit term sheets from selected buildings; and negotiate the selected real estate transaction to minimize the AIMS charter school over all occupancy costs.
3. Specific services may include, but are not limited to, the following:
 - a. Analyze the requirements by AIMS;
 - b. Review the AIMS geographical parameters;
 - c. Prepare a comprehensive market study of available space options, along with an interpretation and assessment of relevant market trends;
 - d. Conduct due diligence investigation of each potential site’s specific suitability for the AIMS requirements as well as ownership financial strength/liquidity;
 - e. Prepare and negotiate landlord lease and/or building purchase agreements for existing location and alternatives;
 - f. Analyze initial term sheets received – both financial and non-financial proposed terms, as well as build-out costs and timeframe implications;
 - g. Prepare presentations comparing alternatives to client;
 - h. Assist client and legal counsel with lease and/or purchase negotiation process;
 - i. Coordinate execution of all transaction documents, evidence of insurance, etc.
 - j. Other services as requested.

4. Cost/Price Analysis during Bidding and Proposals

All proposals will be subject to a cost or price analysis based upon the following criteria. The type and degree of analysis will vary depending on the situation; at minimum, the following analyses will incur:

- a. Independent estimates will be considered before receiving bids or proposals for all proposed activities.
- b. A cost analysis will be performed, and the potential contractor/vendor is required to submit the elements of his or her estimated cost, such as under an architectural engineering services contract.
- c. A cost analysis will be performed when adequate price competition is lacking, and for sole-source proposals (including noncompetitive proposals).

d. A cost analysis will be performed for contract modifications or change orders, unless price reasonableness can be established on the basis of catalog or market price of a product sold in substantial quantities to the general public or based on prices set by law or regulation.

e. A price analysis will be used in all other instances to determine the reasonableness of the proposed contract price.

f. All proposals must include a guaranteed ceiling price that the contractor exceeds at its own risk.

g. AIMS is a public funded organization and will not pay for services that are not rendered. AIMS will only pay realtors a percentage of property price that the vendor actually helps AIMS acquire.

h. Service provided must include potential funding, property identification and acquisition, and construction services.