

**PROPOSAL COVER PAGE**  
**REAL PROPERTY REQUEST FOR PROPOSALS**

**SUBMITTAL DUE:**  
**TUESDAY, APRIL 16, 2024**  
**BY 5:00 PM (PT)**

<b>Proposal Submittal</b>	Lana Lozano, Program Manager Economic Development Department <a href="mailto:Lana.Lozano@stocktonca.gov">Lana.Lozano@stocktonca.gov</a>
<b>Proponent Business Name</b>	
<b>Proponent Contact Name</b>	
<b>Proponent Contact <i>Signature</i></b>	
<b>Proponent Address</b>	
<b>Proponent Phone Number</b>	
<b>Proponent Email Address</b>	
<b>Department of Industrial Relations ID Number (if applicable)</b>	



## **ECONOMIC DEVELOPMENT REAL PROPERTY REQUEST FOR PROPOSALS**

### **Objective**

The City of Stockton is seeking proposals from qualified firms to perform real estate and real property support to the Economic Development Department.

The City of Stockton adopted the Economic Development Strategic Action Plan in January 2022. Since that time staff have made great strides accomplishing key goals, including bringing more than \$5.2 million in grant funding into the City to clean up a nine acre parcel that had been sitting vacant for decades. In February of 2024 Council approved a Development and Disposition Agreement that includes more than 500 units of housing on that site.

The City has also delivered record growth in downtown events and venues, driving more than half a million people downtown in 2023. The momentum is so strong that the City was able to secure a naming rights sponsor for the Adventist Health Arena for the first time in its history. From international award-winning food festivals to multi-million-dollar small business façade programs, the City is a bankable investment.

It is now time to take our plan to the next level. Accordingly, the City is seeking a qualified firm to come alongside the department and support the overall economic development goals of the City. To optimize efficiency, cost and to receive the full complement of services the City reserves the right to contract with more than one firm.

### **Deliverables**

Proposals should include the following elements:

1. COVER PAGE

See Attached.

2. COVER LETTER

Provide a cover letter indicating your interest in providing real estate services to the City of Stockton. The letter should briefly outline the firm's understanding of the work and general information regarding the firm and individuals to be involved. The letter should clearly identify the local address of the firm performing the work, the telephone number, and the name of the authorized representative.

3. BACKGROUND INFORMATION

Include a description of your firm, including size of firm, location, number, and nature of the professional staff to be assigned to this contract, with a brief resume for the lead staff.

#### 4. QUALIFYING EXPERIENCE

Describe the firm's pertinent real estate experience and recent experience with similar engagements to which the proposal relates. Describe one or two cases where the firm provided significant cost reduction and management gains to organizations. Include any substantial experience with the following:

- a. Local government acquisitions and/or leases
- b. Redevelopment or successor agencies
- c. Infill development projects
- d. Preparation of easements, abandonments, and dedications
- e. Managing property inventory
- f. Navigating Surplus Land Act
- g. Development and Disposition Agreements

#### 5. COST PROPOSAL

Provide a detailed cost proposal, including any travel costs and other expenses. Cost proposals should include:

- a. Itemized budget per initiative or task
- b. Estimated time needed for each task
- c. Standard hourly billing rates for all proposed team members
- d. Method of compensation for real estate acquisition

#### 6. REFERENCES

Provide at least three references from clients for whom the firm has performed services similar to those being requested in this RFP.

#### 7. CONFLICT OF INTEREST

In order to avoid a conflict of interest, or the appearance of a conflict of interest, the firm should not engage in any outside activities that are inconsistent, incompatible, or appear to conflict with your ability to exercise independent/objective judgment in the best interest of the City of Stockton. Please outline all conflicts of interest that may exist for your firm in relation to providing real estate services for the City.

#### 8. ADDITIONAL SERVICES

Describe additional relevant/unique services offered through your firm.

#### 9. GOOD STANDING

Your firm must be in compliance with: Federal, State, County and local units of government, which specifically includes good tax payment status and good corporate registration status. Firm must also have a valid City of Stockton Business License.

### **Scope of Work**

The Economic Development Department has several projects on the horizon that require real estate/real property support services. The Department anticipates up to three acquisitions or dispositions in the next year, a dozen easements or abandonments and several potential leasing

opportunities. The following tasks should be included in the Cost Proposal and reflected within the Qualifying Experience section to the greatest extent possible.

1. Negotiates for the purchase, sale, and lease of real property.
  - a. Coordinate real estate transaction closings.
  - b. Handle all other customary activities and services associated with real estate transactions.
  - c. Analyze offers from potential lessees and advise the City with respect to negotiations.
  - d. Negotiates contract terms related to real property transactions with businesses and private parties; prepares acquisition documents, legal descriptions, deeds, and escrow instructions and analyzes conditions of title.
  - e. Acts as project manager during due diligence period
2. Provides relocation assistance to displaced tenants and property owners and reviews and processes relocation claims for payment.
3. Appraises real property and reviews real property appraisals provided under contract.
4. Coordinates real estate activities with the City Attorney to ensure compliance with legal guidelines.
5. Preparation of easements and processes the abandonment and dedication of public rights-of-way.
6. Conducts thorough review of City of Stockton property management records and an inventory of City and Redevelopment Agency owned or leased property; performs property management and asset management activities.

### **Submission**

Proposals must include the attached Cover Page, including a signature from an officer of the firm authorized to bind the firm to all comments made in the proposal.

The City of Stockton reserves the right to reject any or all submissions.

### **Evaluation of Proposals**

Each proposal will be reviewed by a committee composed of City representatives. The review committee will evaluate the extent to which the proposal meets the project requirements set forth in the RFP, including an analysis of the respondent's experience and qualifications, approach and capacity, knowledge, and cost proposal.

Proposals will be scored on the following:

<b><u>Dimensions</u></b>	<b><u>Weights (%)</u></b>
• Experience and Qualifications	40
• Background	30
• Price/Cost Proposal	30

### **Deadline**

Tuesday, April 16, 2024 by 5:00 pm

**Submittal Instructions**

Respondents shall submit proposals via email in PDF format to:

Lana Lozano

Program Manager

City of Stockton

[Lana.Lozano@stocktonca.gov](mailto:Lana.Lozano@stocktonca.gov)

**Contract Type and Insurance**

It is anticipated that a standard form professional services agreement contract will be used (substantially similar to [this sample](#)). See Exhibit A for the insurance requirements related to this contract. A certificate of insurance and specified endorsement pages will be required prior to execution of the contract.