



Request for Qualifications (RFQ)

#1-RFQ-TEXAS-2022 Real Estate Broker

Closing Date:
2:00 PM CST
Friday, February 25, 2022

IDEA Public Schools (“School”) is seeking Proposals in response to this Request for Qualifications (RFQ) for real estate broker services.

Inquiries and requests for information affecting the solicitation must be submitted in writing and shall be directed to Mia Harris, Assistant Director of Purchasing, at mia.harris@ideapublicschools.org. All inquiries via email should have the subject line read: Questions - #1-RFQ-TEXAS-2022 – Real Estate Broker to provide IDEA Public Schools and affiliated entities (IDEA), sufficient time to adequately prepare responses to vendor inquiries, all questions must be submitted by February 16, 2022, by 3:00 PM (CST). Contact with IDEA Public Schools personnel other than Mia Harris or designee regarding this solicitation may be a reason for elimination from the selection process. Any prospective respondent detecting conflict or ambiguity in the RFP should notify the Assistant Director of Purchasing, in writing, setting forth the grounds of the alleged conflict or ambiguity and requesting the issuance of a clarifying addendum.

Contact:
Mia Harris
Assistant Director of Purchasing
mia.harris@ideapublicschools.org
(210) 400-3933

No verbal responses will be provided. Please note that RFQ tabulations are **NOT** available by telephone or on our website. A copy of the solicitation and Addenda will be posted to the Purchasing website. You may obtain these documents from our internet/website address: IDEA Public Schools

To be eligible for consideration, electronically locked proposals should be received via [Tyler Munis Self Service](#) or by mail to the IDEA Public Schools Headquarters no later than **2:00 PM CST** on **February 25, 2022**, along with the requisite signature pages and certification forms.

IDEA Public Schools
Attn. Purchasing Department
2115 West Pike Blvd
Weslaco, TX 78596
(956) 377-8000

It is the responsibility of each Proposer to obtain all addenda that pertains to this RFQ.

The Board of Trustees of IDEA Public Schools reserves the right to accept or reject any Proposal or any part thereof or any combination of Proposals and to waive any or all formalities. All responses in the Proposal may be used by the school in the selection process. The school reserves the right to verify the accuracy and completeness of all responses by utilizing any information available to the school without regard to whether such information appears in the Proposal.

By submitting a Proposal, each Broker agrees to waive any claim it has or may have against the School, its Trustees, agents and employees, and any reference sources, arising out of or in connection with the administration, evaluation, or recommendation of any Proposal; waiver of any requirements in the Request for Qualifications; acceptance or rejection of any Proposal and award of a Contract.

The Proposal submitted in response to this RFQ must remain open for acceptance for a period of **ninety (90) days** subsequent to the opening of RFQ, unless otherwise indicated, to allow time for the Proposal to be evaluated and Board of Trustees action, if required.

The successful bidder(s)/proposer(s) will be notified in writing (by an award letter or properly executed purchase order) after review and acceptance by IDEA Public Schools Board of Trustees.

General Information:

IDEA Public Schools is seeking quality firms to provide Real Estate Services in four areas to include, but not limited to, services described below:

- Purchase of Real Estate Property
- Sale of Real Estate Property
- Leasing of Real Estate Property
- Real Estate Property Appraisal Services

It is the intent of the school to qualify firms to provide these services on an “as needed” basis. The school has no obligation to engage any firm(s) submitting a response to the RFQ.

Response Submission: You are hereby requested to submit your qualifications as a Real Estate Broker on the attached Respondent Questionnaire Form. All brokers must be registered in the State of Texas.

You must also complete the following:

- Felony Conviction Notice (attached)
- Conflict of Interest Questionnaire (attached)
- Fill out and submit the most recent Disclosure of Interested Parties, Certificate of Interested Parties (Form 1295), which may be found at https://www.ethics.state.tx.us/whatsnew/elf_info_form1295.htm.

The final contract is subject to review and approval by the Board of IDEA Public Schools.

You may attach additional information to this qualification form.

Once the qualifications are received and reviewed, your firm may be asked to make a presentation to the Board of Trustees.

BROKER RESPONSIBILITIES

The qualified, licensed, commercial real estate broker’s scope of services will include, but not be limited to the following:

- a. Assist the School in development of marketing materials describing sites that are for sale including physical characteristics and other pertinent information.
- b. Assist the School in preparation of the offerings and related documents.
- c. Develop and provide a database of qualified and prospective purchasers of School Properties.
- d. Market sites on a local and national basis, including direct contacts, advertising, and internet website marketing.
- e. Prepare periodic status reports indicating progress in marketing the properties.
- f. Meet with designated School personnel on a periodic basis to review status reports on marketing efforts.

- g. Assist with negotiation of the sales contract(s) and other requirements related to the sale(s) of School properties.
- h. Assist the School and its attorneys in coordinating efforts to achieve a timely and efficient documentation process, including the closing of transactions.
- i. Assist as requested by the school, with various other miscellaneous real estate activities such as assistance in locating future School sites for lease or purchase, providing general real estate economic information and analysis on real estate issues of interest to the school, assist in negotiating for purchase or lease of properties by the school, and provide general expertise to the School on real estate related matters.
- j. Searching for properties, per the school's request.
- k. Developing strategies for rental, acquisition and/or sale of properties, per the school's request.
- l. Negotiating with landlords, sellers or buyers on behalf of the school, per the school's request.
- m. Providing appraisals or coordinating with Real Estate Appraisers, per the school's request.
- n. Coordinating and securing title information, real estate transaction closings, and handling all other customary activities and services associated with real estate transactions

The use of Real Estate Broker Services for the School will be coordinated through the Procurement Department and Treasury Department at IDEA Public Schools. The provider will be expected to work directly with representatives of various School departments (Business Office, Risk Management, etc.) when providing services. All services shall be administered in conformance with Federal and State Laws, and applicable IDEA Public School policies and procedures.

BROKER'S QUALIFICATIONS

Respondents to this RFQ shall have the following qualifications:

Must be licensed and in good standing with the Texas Real Estate Commission.

Must have an excellent reputation in the real estate community.

Must be knowledgeable in the local real estate market and have a minimum of five (5) years' experience with small and large commercial properties, and unimproved land acquisition.

Knowledge of IDEA Public School's area and/or regions where real estate is desired.

Knowledge and experience in the acquisition and sale of school owned property is desired.

BROKER'S SELECTION PROCESS

Qualification-based selection process will include the following areas:

	Area
1.	Firm Size and General Capabilities
2.	Geographical market expertise in Texas regions
3.	On-the-ground presence
4.	Strong local and community relationships
5.	Experience with Educational Clients
6.	Licenses & Certifications in Good Standing
7.	Mapping capabilities
8.	Specialty Expertise

REAL ESTATE BROKER

1. General Information:

Firm Name: _____

Address of Firm: _____

City: _____ State: _____ Zip: _____

Multiple Listing Membership(s): _____

Contact Persons: (Limit to two (2) persons per firm/application)

Name: _____ Title: _____

Telephone: _____ Cell Phone: _____ Fax: _____

E-mail Address: _____

Texas License Number: _____

Name: _____ Title: _____

Telephone: _____ Cell Phone: _____ Fax: _____

E-mail Address: _____

Texas License Number: _____

Type of Organization:

_____ Sole Proprietorship (individual)
_____ Partnership
_____ Other _____

_____ Corporation
_____ Joint Venture

2. Firm Background and Staff:

Year present firm established: _____

Name of parent company, if any: _____

List principals of firm:

Former company name(s) if any, and year(s) established:

Name: _____ Year: _____

Name: _____ Year: _____

Name: _____ Year: _____

Number of employees in firm: _____

Who will be the designated representative assigned to the school? How long have they been with your firm?

Who is the senior member of the firm assigned to the school? How long have they been with your firm?

3. Identify the types of services provided by your firm:

Purchase of Real Estate Property _____

Sale of Real Estate Property _____

Leasing of Real Estate Property _____

Real Estate Property Appraisal Services _____

Specialty Expertise (hospitality, retail, etc.) _____

Other Real Estate Services _____

Professional Services provided by the firm: (List all services applicable to your firm.)

4. **Summarize services provided to the school as part of the basic services:**

5. **Describe the manner in which your firm will work to locate and help negotiate an offer/contract for real property.**

6. **What is the term of your multiple listing contract(s)?**

7. **Professional Liability Insurance:**

Describe limits per project: _____

Describe limits in aggregate: _____

Has your firm had claims asserted against it within the last five (5) years? _____

If yes, please give details of each claim:

8. **Experience Profile:** List the number of commercial or school properties your company has sold in the last five (5) years in Texas.

Project Type	New Construction	Renovation/Addition
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_____	_____	_____
_____	_____	_____
_____	_____	_____

9. **Current Clients and Projects:** Please list three (3) of your current clients whose projects reflect the scope of your present workload.

Project: _____
County: _____
Contact Person/Title: _____
Phone Number: _____
Project Description: _____

Project: _____
County: _____
Contact Person/Title: _____
Phone Number: _____
Project Description: _____

Project: _____
County: _____
Contact Person/Title: _____
Phone Number: _____
Project Description: _____

10. **Commission Fee:**

Please describe your firm's charges for assisting in purchasing real property for the school and include all commissions or other charges.

11. **Brochure:**

Please attach a brochure or material that describes examples of your firm's projects.

12. **Authorized Signature:**

The information provided on this application, I believe to be true and representative of the firm for which it is submitted.

Signature of Authorized Representative

Date

Printed Name and Title of Representative

FELONY CONVICTION NOTICE

Texas Education Code Section 44.034, Notification of Criminal History, Subsection (a), states “[a] person or business entity that enters into a contract with a school must give advance notice to the if the person or an owner 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 conviction of a felony.”

Subsection (b) states “[a] school may terminate a contract with a person or business entity if the 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 school must compensate the person or business entity for services performed before the termination of the contract.”

THIS NOTICE IS NOT REQUIRED OF A PUBLICLY HELD CORPORATION

I, the undersigned agent for the firm named below, certify that the information concerning notification of felony convictions has been reviewed by me and the following information furnished is true to the best of my knowledge.

FIRM’S NAME: _____

AUTHORIZED COMPANY OFFICIAL’S NAME (PRINTED): _____

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

Signature of Company Official: _____

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

Signature of Company Official: _____

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

Name of Felon(s): _____

Detail of Conviction: _____

Signature of Company Official: _____

CONFLICT OF INTEREST QUESTIONNAIRE

FORM CIQ

For vendor doing business with local governmental entity

This questionnaire reflects changes made to the law by H.B. 23, 84th Leg., Regular Session.

This questionnaire is being filed in accordance with Chapter 176, Local Government Code, by a vendor who has a business relationship as defined by Section 176.001(1-a) with a local governmental entity and the vendor meets requirements under Section 176.006(a).

By law this questionnaire must be filed with the records administrator of the local governmental entity not later than the 7th business day after the date the vendor becomes aware of facts that require the statement to be filed. See Section 176.006(a-1), Local Government Code.

A vendor commits an offense if the vendor knowingly violates Section 176.006, Local Government Code. An offense under this section is a misdemeanor.

OFFICE USE ONLY

Date Received

1 Name of vendor who has a business relationship with local governmental entity.

2 Check this box if you are filing an update to a previously filed questionnaire. (The law requires that you file an updated completed questionnaire with the appropriate filing authority not later than the 7th business day after the date on which you became aware that the originally filed questionnaire was incomplete or inaccurate.)

3 Name of local government officer about whom the information is being disclosed.

Name of Officer

4 Describe each employment or other business relationship with the local government officer, or a family member of the officer, as described by Section 176.003(a)(2)(A). Also describe any family relationship with the local government officer. Complete subparts A and B for each employment or business relationship described. Attach additional pages to this Form CIQ as necessary.

A. Is the local government officer or a family member of the officer receiving or likely to receive taxable income, other than investment income, from the vendor?

Yes No

B. Is the vendor receiving or likely to receive taxable income, other than investment income, from or at the direction of the local government officer or a family member of the officer AND the taxable income is not received from the local governmental entity?

Yes No

5 Describe each employment or business relationship that the vendor named in Section 1 maintains with a corporation or other business entity with respect to which the local government officer serves as an officer or director, or holds an ownership interest of one percent or more.

6 Check this box if the vendor has given the local government officer or a family member of the officer one or more gifts as described in Section 176.003(a)(2)(B), excluding gifts described in Section 176.003(a-1).

7

Signature of vendor doing business with the governmental entity

Date

CONFLICT OF INTEREST QUESTIONNAIRE
For vendor doing business with local governmental entity

A complete copy of Chapter 176 of the Local Government Code may be found at <http://www.statutes.legis.state.tx.us/Docs/LG/htm/LG.176.htm>. For easy reference, below are some of the sections cited on this form.

Local Government Code § 176.001(1-a): "Business relationship" means a connection between two or more parties based on commercial activity of one of the parties. The term does not include a connection based on:

- (A) a transaction that is subject to rate or fee regulation by a federal, state, or local governmental entity or an agency of a federal, state, or local governmental entity;
- (B) a transaction conducted at a price and subject to terms available to the public; or
- (C) a purchase or lease of goods or services from a person that is chartered by a state or federal agency and that is subject to regular examination by, and reporting to, that agency.

Local Government Code § 176.003(a)(2)(A) and (B):

(a) A local government officer shall file a conflicts disclosure statement with respect to a vendor if:

(2) the vendor:

(A) has an employment or other business relationship with the local government officer or a family member of the officer that results in the officer or family member receiving taxable income, other than investment income, that exceeds \$2,500 during the 12-month period preceding the date that the officer becomes aware that

(i) a contract between the local governmental entity and vendor has been executed;

or

(ii) the local governmental entity is considering entering into a contract with the vendor;

(B) has given to the local government officer or a family member of the officer one or more gifts that have an aggregate value of more than \$100 in the 12-month period preceding the date the officer becomes aware that:

(i) a contract between the local governmental entity and vendor has been executed; or

(ii) the local governmental entity is considering entering into a contract with the vendor.

Local Government Code § 176.006(a) and (a-1)

(a) A vendor shall file a completed conflict of interest questionnaire if the vendor has a business relationship with a local governmental entity and:

(1) has an employment or other business relationship with a local government officer of that local governmental entity, or a family member of the officer, described by Section 176.003(a)(2)(A);

(2) has given a local government officer of that local governmental entity, or a family member of the officer, one or more gifts with the aggregate value specified by Section 176.003(a)(2)(B), excluding any gift described by Section 176.003(a-1); or

(3) has a family relationship with a local government officer of that local governmental entity.

(a-1) The completed conflict of interest questionnaire must be filed with the appropriate records administrator not later than the seventh business day after the later of:

(1) the date that the vendor:

(A) begins discussions or negotiations to enter into a contract with the local governmental entity; or

(B) submits to the local governmental entity an application, response to a request for proposals or bids, correspondence, or another writing related to a potential contract with the local governmental entity; or

(2) the date the vendor becomes aware:

(A) of an employment or other business relationship with a local government officer, or a family member of the officer, described by Subsection (a);

(B) that the vendor has given one or more gifts described by Subsection (a); or

(C) of a family relationship with a local government officer.