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| **REQUEST FOR QUALIFICATIONS FOR**  **Residential Real Estate Brokerage Services**  **MYR | RFQ 2019 Residential Real Estate Brokerage Services**  **CONTACT: Ffely Charun, ffely.charun@sfgov.org** |

Responses received under this RFQ that fail to address each of the requested items in this Attachment V, Response Template in sufficient and complete detail to substantiate that the Respondent can meet the City’s Minimum Qualifications, will be deemed non-responsive and will not be considered for prequalification. Note that responses of “To be provided upon request” or “To be determined” or the like, or that do not otherwise provide the information requested (left blank) are not acceptable.

There is a page limit of 50 pages. If your firm submits more than 50 pages, only the first 50pages will be evaluated.

Instructions are provided in blue and may be deleted. Please complete your Response in the template provided, using as much space as needed. Indicate clearly where separate documents are provided. In order to receive the maximum amount of points, please be sure to follow this format carefully and thoroughly (but concisely) address each section. Please ensure your Response meets the Minimum Qualifications so that it will be evaluated.

For word processing documents, the department prefers that text be unjustified (i.e., with a ragged-right margin) and use a serif font (e.g., Times Roman, and not Arial) and no smaller than size 12-point font, and that pages have margins of at least 1” on all sides (excluding headers and footers).

**Note that all documents under this RFQ process are subject to public disclosure. Please redact confidential or proprietary information as appropriate.**

**I. Executive Summary**

1. Respondent Information

|  |  |
| --- | --- |
| Respondent’s Firm Name |  |
| Respondent’s Firm Address |  |
| Respondent’s Corporate Headquarters Address (if different from above) |  |
| Respondent’s City Supplier ID | Note: Possession of this number serves as partial verification that the Respondent has completed the City’s administrative requirements (see Attachment III for more details). |
| Respondent’s Partner(s) Firm Name(s) |  |

## 2. Certification of Headquarters in Accordance with Administrative Code Chapter 12X.

***Response should complete the following statement:***

“This Contract is subject to the requirements of Administrative Code Chapter 12X, which prohibits the City from entering into contracts with companies headquartered in states with laws that perpetuate discrimination against LGBP populations or where any or all of the work on the contract will be performed in any of those states. Bidders are hereby advised that Bidders, which have their United States headquarters in a state on the Covered State List, as that term is defined in Administrative Code Section 12X.3, or where any or all of the work on the contract will be performed in a state on the Covered State List may not enter into contracts with the City. A list of states on the Covered State List is available at the website of the City Administrator. I certify that my company is headquartered at the following address \_­\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_. I will notify the City if my company’s headquarters moves.”

## 3. RFQ Contact

Clearly identify the person that will serve as the overall RFQ contact. This person will receive e-mail notifications regarding the RFQ process.

|  |  |
| --- | --- |
| Name |  |
| Title |  |
| Email |  |
| Phone |  |
| Fax |  |
| Address |  |

## 4. How did you find out about this RFQ Opportunity?

Insert Response Here.

**II. Minimum Qualifications**

The Minimum Qualifications are used by the City to determine whether the Respondent meets qualifications and the proposed staff has had experience on projects comparable to the services the City is requesting. Any Responses that does not demonstrate that the Respondent meets these Minimum Qualifications by the Response deadline will be considered non-responsive and will not be evaluated or eligible for inclusion in the pre-qualified list. Be sure to complete this section, as described.

## Respondent Certification

*Respondents not meeting these minimum qualifications, as demonstrated through the Prior Transactions information provided, will not be considered and their RFQ responses will be deemed non-responsive and not be evaluated. Be sure to complete this section, as described.*

**The Respondent certifies that:**

|  |  |
| --- | --- |
| **Minimum Qualifications** | **Yes?** |
| **Experience:**   1. RFQ ATTACHMENTS: Has completed the requirements and submitted the forms described in RFQ Attachments I, III, IV and V as part of RFQ response, as applicable. 2. REQUIRED EXPERIENCE:   Has at least five years of residential real estate brokerage experience.  Is licensed to conduct business in the Sate of California  Is an active member of the San Francisco Association of Realtors.  Has demonstrated successful completion of at least two (2) projects within the past three (3) years in or substantially similar to the services solicited through this RFQ. The lead staff proposed to be assigned to the City’s project(s) must individually have had a substantially similar lead role in at least two (2) of the projects described in the Prior Projects section below.   1. PREFERRED EXPERIENCE:   Three years of experience working with City homeownership programs or similar programs that are administered by other government agencies, non-profit organizations and financial institutions; and,  Strong knowledge of first-time homebuyer programs and community lending programs.  Experience working with Real Estate Owned (REO) properties.  Experience in providing eviction services.  Has submitted no more than four (4) and no fewer than two (2) Prior Project Descriptions, as part of RFQ Attachment V response, for which it would like to be considered for prequalification. The services described in the Prior Project Descriptions must:   * include services comparable to Section 2 Scope of Work of this RFQ, * be within five (5) years from the date of this RFQ, and * be successfully completed, which means transaction outcomes have been completed and accepted by client.   The City reserves the right to contact the client to confirm the level of transaction completeness and acceptance.  If more than four (4) Prior Project Descriptions are submitted, only the first four (4) will be reviewed for consideration. |  |
| **Staffing:**  The lead staff, including the Respondent’s Project Manager and technical lead(s), proposed to be assigned to the City’s project(s) must individually have had a similar lead role in a minimum of two (2) of the Prior Project Descriptions submitted. The Respondents shall identify functional and technical leads and include their resumes. Respondents may also include resumes for supporting principal and senior consultants. |  |

## Client List

Attach or insert a client list that illustrates the breadth and depth of your firm’s experience in residential real estate brokerage services.

Insert Response Here.

## Staff Qualifications

Describe proposed staff’s direct experience with providing residential real estate brokerage services for San Francisco properties.

Insert Response Here

Use the following table or alternative format to indicate firm principals and key staff members, including Local Business Enterprise and other subconsultant staff proposed to perform residential real estate brokerage services for the City. Include years of experience for the proposed individuals in residential real estate brokerage services (or related services for subconsultant). Respondents are encouraged to include resumes or curriculum vitae (“CV”) in lieu of providing a narrative. Include as many rows as necessary.

|  |  |
| --- | --- |
| **Name and Title** | **Experience and Qualification** |
| Name  Title and/or Role | Insert narrative here, or indicate if resume or CV is attached. |
| Name  Title and/or Role | Insert narrative here, or indicate if resume or CV is attached. |
| Name  Title and/or Role | Insert narrative here, or indicate if resume or CV is attached. |

## Prior Project Descriptions

Using the following template, Respondents must provide detailed information on a minimum of two (2), maximum of four (4) successfully completed Prior Project Descriptions in accordance with the Minimum Qualifications stated above. Copy and attach additional template pages as necessary.

Select the projects that best demonstrate your experience and that are the most applicable to the City’s needs described in the RFQ Scope of Work. Projects may be no more than three (3) years old, and should demonstrate that the Respondent meets the Experience Minimum Qualification.

Contacts for each project are required, and may serve as references for the Respondent. The City will not inform Respondent when references will be contacted. The Respondent should ensure that client contact information listed in the Response is up-to-date and should notify references that the City may be contacting them. See RFQ Attachment I, Section 14.

## Failure to provide the information as requested will result in rejection of your proposal.

PRIOR PROJECT DESCRIPTION #X

|  |  |
| --- | --- |
| Project | Project Name |
| Client | Client Name (City, County, etc.) |
| Client Unit | Client Agency, Department, or Unit Name |
| Client Contact Name and Title |  |
| Client Contact Phone |  |
| Client Contact E-mail |  |
| Timeline | Month/Year to Month/Year; Length of project beginning to end  (Project must be within five (5) years from the date of this RFQ) |
| Consultant Firm Name |  |
| Consultant Lead(s) | Staff Lead Name(s) – same as lead proposed to City? |
| Fee | $00,000.00 |
| Number of Hours | XX hours |
| Service Area(s) covered by this Prior Project Description | 🞏 SA1  🞏 SA2 |
|  |  |
| Project Background Include background information regarding the client and/or program, as applicable. What were the project goals and desired outcomes? If different, what were the goals and desired outcomes of your services?  Insert Response Here.  Project Scope What were the project activities your firm completed? Provide sufficient information to give the City insight into the size/complexity and scope of the project.  Insert Response Here.  Project Approach How did you approach the project? What methodologies were used, and how did those address the project goals? Describe any challenges you have faced, including strategies you used to address them.  Insert Response Here.  Project Staffing Identify each key person on the project team with titles and roles and hourly rate, including all subcontractors. Include brief narrative descriptions of the responsibilities each person had on the project.  Insert Response Here.  Involvement of Client and/or Stakeholders Discuss how client and any stakeholders were involved in the project, major opportunities for input, client staff contributions, etc.  Insert Response Here.  Project Outcomes What, if any, measurable service deliverables or outcomes can be attributed to your services? How did you add value to the client? Examples include but are not limited to the amount of cost savings as a result of services provided, legislative or policy changes, organizational changes, or other measurable indicators of successful implementation of findings from your services.  Insert Response Here. | |

**III. Approach**

1. Describe your firm’s proposed approach to services and activities described in the Section 2, Scope of Work of the RFQ.

Insert Response Here.

1. What makes your firm’s approach to providing residential real estate brokerage services different or more effective than other firms providing the same services? Include differences in methodology, staff roles and responsibilities, and documentation processes, as applicable.

Insert Response Here.

1. Describe your firm’s approach to residential real estate brokerage services, including data used and how department staff are involved in the process.

Insert Response Here.

1. What can your firm do to ensure a successful engagement with the City? What project performance outcomes do you expect to provide to the City?

Insert Response Here.

1. Describe any other asset, expertise, experience, data and technology that provides your firm with a competitive edge or advantage.

Insert Response Here.

**IV. Sample Products**

Please attach up to two (2) project product examples that demonstrate your experience providing the services specified or similar to those listed in this RFQ for which your firm would like to be pre-qualified. These sample products are not to be used by the Respondent as a substitute for providing all requested information in this attachment.

Note that all documents under this RFQ process are subject to public disclosure. Please redact confidential or proprietary information as appropriate.

**II. Evaluation Criteria 100 points**

***Evaluation Team***

***City staff and representatives with expertise in residential real estate transactions will serve as the Evaluation Team responsible for evaluating Respondents. Specifically, the team will be responsible for the evaluation and rating of the responses for prequalification, for conducting reference checks, and for interviews, if desired by the City.***

***Each RFQ response that meets the Minimum Qualifications will be evaluated in accordance with the criteria below. A Respondent must receive a score of 70 points or above out of the 100 total possible points to be prequalified. There is no numerical limit to the number of firms that may be prequalified.***

* + 1. ***Demonstrated Experience of Respondent - (45 points)***

1. ***Demonstrated and verifiable experience of providing residential real estate brokerage services, substantially similar to what is requested in this RFQ.***
2. ***Proven ability to successfully meet the proposed scope of work outlined in this RFQ.***
3. ***Organization, clarity, cohesiveness, quality and completeness of response.***
   * 1. ***Expertise/Skills of Assigned Staff - (45 points)***
4. ***Experience of staff to be assigned to this contract.***
5. ***Professional qualifications, education and skill set of assigned staff.***
6. ***Staff availability, accessibility and workload.***
7. ***Expectations of client involvement or level of effort are appropriate; the proposed approach and questions demonstrate experience with providing services to comparable clients***
8. ***Sufficient expertise and methodology to create competitive differences that will be beneficial to the City is demonstrated***
9. ***Cost response is sufficiently detailed, reasonable and appropriate***
   * 1. ***Completeness of Response Submission – (10 points)***
10. ***Response conforms with RFQ requirements and concisely but comprehensively addresses RFQ requirements;***
11. ***Response is professionally presented and contains organized content and format.***