

**TOWN OF TRUMBULL
REQUEST FOR QUALIFICATIONS AND PROPOSAL FOR
COMMERCIAL AND RESIDENTIAL BROKER SERVICES
TOWN PROPERTY SALES**

RFP: # 6232

DUE: APRIL 28, 2017 @ 2:00 PM

GENERAL INFORMATION

The Town of Trumbull (hereinafter referred to as Town) invites interested and qualified parties (hereinafter referred to as Contractor, Respondent, or Proposer) to submit qualifications and fees based on the requirements and work scope detailed in this request. The information contained herein outlines the intent and scope of this request and the guidelines governing the submission and evaluation process.

The Town of Trumbull is seeking proposals for the services of a Commercial and Residential Real Estate Broker (Broker) to provide Commercial Real Property Services for selected Town of Trumbull properties that are available for sale. The Broker must be a member of National Association of Realtors, Connecticut Association of Realtors (CAR) and demonstrate the ability to provide professional means to market the Town properties both locally and nationally. The Broker will list and market Town of Trumbull properties as the listing Broker for the Town of Trumbull.

As the listing Broker, the Broker will receive a commission for each sale based on a percentage of the sale price. No commission will be paid in such instances.

A. PREPARATION OF PROPOSALS

1. One (1) ORIGINAL and two (2) EXACT COPY of your proposal shall be submitted using the forms contained herein. All proposals shall be submitted in a clear, concise and legible manner to permit proper evaluation.
2. Brokers may also submit, under separate cover with their proposal, any additional reports and documents that are necessary to meet the requirements of this request.

B. PROPOSAL SUBMISSION

1. Proposals are to be submitted in a sealed envelope and addressed as follows:

**RFP # 6232 - REAL ESTATE BROKER SERVICES
Due: APRIL 28, 2017
Attention: Kevin J Bova
Purchasing Agent
Town of Trumbull
5866 Main Street, Trumbull, CT 06611**
2. Proposals must be signed by an authorized principal or agent and the person signing the proposal form must be authorized by the organization to contractually bind that organization with regard to price and related contractual obligations. Unsigned proposals shall not be considered.
3. A proposal may be withdrawn at any time prior to the above scheduled date. A proposal received after the above scheduled date and time shall not be considered or opened.

C. TOWN OPTIONS

The Town reserves the right to reject any or all proposals and to waive any requirements, irregularities, technical defects or service therein when it is deemed to be in the best interest of the Town.

D. TAXES

All purchases made by the Town, and associated with the award of this requirement shall be tax exempt. Any taxes must not be included in proposal prices. A Town Tax Exemption Certificate shall be furnished upon request.

E. INQUIRIES

1. General questions concerning this request and submission requirements may be directed to **Rina Bakalar Director of Economic and Development 203-452-5047 rbakalar@trumbull-ct.gov** . To ensure consistent interpretation of certain items, answers to questions the Town deems to be in the interest of all proposers will be made available in writing, Email or by Fax as appropriate to all proposers.
2. Additionally, after proposals are received, the Town reserves the right to communicate with any or all of the proposers to clarify the provisions of this request. The Town further reserves the right to request additional information at any time after proposals are opened from any one or all of the Brokers.

F. AWARD AND AUTHORITY

The purchasing authority of the Town shall issue notification of award in writing. The Town may choose more than one broker for this project and may award To more than one "ON CALL" Broker(s) for future sales.

G. AWARD AND PRICING

Individual requirements and or assignments shall be awarded to the successful respondent to this request on an as needed basis for specific properties designated by the Town. The Real Estate Company(s) will be selected based on qualifications, marketing ability, past experience's in the sale of properties and references guided by the rates and pricing structure identified in the proposal form contained herein PRIOR to the commencement of any work assignments. The Town reserves the right to request firm price quotations for individual projects from the successful respondent or from any other contractor if the dollar limits exceed certain Town Charter provisions as related to sealed bid proposals.

1. All pricing quoted shall remain firm fixed for a period of one (1) year from date of proposal opening. Special consideration will be given to responses with extended firm price dates.
2. The duration of the contract shall be for one (1) year and may be renewed for Two (2) additional years at the commission for each sale based on a percentage of the sale price stated in the Proposal Form by giving the vendor / Broker at least thirty (30) days written notice and upon mutual consent of both parties. Not withstanding the foregoing the Town may cancel the contract at any time.

H. ASSIGNMENT OF RIGHTS, TITLES, AND INTERESTS AND SUBCONTRACTING

Any assignment or subcontracting for work to be performed related to this request, in whole or in part, and any other interest in conjunction with Town procurement shall not be permitted without the express written consent of the Town.

I. HOLD HARMLESS CLAUSE

Any Agency / Broker of the Town agrees to indemnify, hold harmless and defend the Town from and against any and all liability for loss, damage or expense which the Town may suffer or for which the Town may be held liable by reason of injury, including death, to any person or damage to any property arising out of or in any manner connected with the operations to be performed under this request and subsequent Contract, whether or not due in whole or in part of any act, omission or negligence of the Town or any of its representatives or employees. The Real Estate Company, its agents and assigns shall indemnify and hold harmless the Town of Trumbull, including but not limited to, its elected officials, its officers, and agents, ("the Town") from any and all claims made against the Town of Trumbull, including but not limited to, damages, awards, costs and reasonable attorney's fees, to the extent any such claim directly and proximately results from the wrongful willful or negligent performance of services by the Real Estate Company during the Real Estate Company's performance of this Agreement or any other Agreements of the Real Estate Company entered into by reason thereof. The Town of Trumbull agrees to give the Real Estate Company prompt notice of any such claim and absent a conflict of interest, an opportunity to control the defense thereof.

J. WORK REGULATIONS AND STANDARDS

All work activities performed in association with this request must be performed and completed for the Town in accordance with current Federal, State and Local regulations.

K. INSURANCE

The selected firm is required to furnish a Certificate of Insurance naming the Town of Trumbull as the additional insured. The Real Estate Agency selected shall procure and maintain for the duration of the contract period insurance against claims for injuries to persons or damages to property which may arise from, or be in connection with the performance of the work hereunder by the Real Estate Agency, their agent's representatives or employees.

The Real Estate Agency shall agree to maintain in force at all times during which services are to be performed the following coverages placed with company(ies) licensed by the State of Connecticut which have at least an "A-" VIII policyholders rating according to Best Publication's latest edition Key Rating Guide

If any policy is written on a "Claims Made" basis, the policy must be continually renewed for a minimum of two (2) years from the completion date of this contract. If the policy is replaced and/or the retroactive date is changed, then the expiring policy must be endorsed to extend the reporting period for claims for the policy in effect during the contract for two (2) years from the completion date.

A. Minimum Scope and Limits of Insurance

1. General Liability

\$1,000,000 combined single limit per occurrence for bodily injury, personal Injury, and property damage.
\$2,000,000 General Aggregate.
\$2,000,000 Product/Completed Operations Aggregate.

2. Automobile Liability

\$1,000,000 combined single limit per occurrence for bodily injury and Property damage/each accident

3. Umbrella Liability

\$1,000,000 per occurrence, following form.
\$1,000,000 Aggregate

4. Workers' Compensation and Employer's Liability

Limits as required by Connecticut State Law

\$500,000 EL Each Accident
\$500,000 EL Disease Each Employee
\$500,000 EL Disease Policy Limit

5. Professional Liability (if used on a claims-made basis, insurance coverage shall be Maintained for the duration of the contract and for two (2) years following contract Completion.)

\$1,000,000 per Occurrence
\$1,000,000 Aggregate (Excess Liability)

Such notice shall be made by registered mail; postage prepaid, to the Purchasing Agent, Town of Trumbull, Town Hall, Trumbull, Connecticut 06611. In the event of cancellation, the contractor shall cease all operations on or before the effective date of said cancellation and he shall not commence work again until he has obtained replacement insurance and has delivered a Certificate of Insurance to the office of the Owner's Purchasing Department.

L. ADDENDUMS

It is the responsibility of all proposal submitters to verify with the Town if any addendums or changes to this have been. All and any addendums will be posted on the Town of Trumbull – Purchasing department website. www.trumbull-ct.gov .

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Instructions- Qualifications - Scope of services

Instructions-Qualifications-Scope of Services

Preparation of Proposal

- Submit an original and two (2) copies of the proposal.
- Make proposal in name of principal and if co-partnership, give names of all parties. Give complete address and primary contact person.
- Clearly identify which property or properties you are interested in representing.
- Proposals must be received prior to due date and time. Late proposals will **not** be accepted.
- Submit W9 Form

Qualifications

Proposers must have:

- Minimum of 5 years' experience working in the sale of Commercial and Residential Real property.
- Valid Broker's License and proper insurance.
- Successfully completed Appraisal 1 Course or its equivalent.
- REO Certification, REO Continuing Education or equivalent.
- Membership in at least Fairfield and New Haven County Multiple Listing Services or other professional listing services generally listing commercial and mixed-use properties.
- Demonstrated ability to sell Real Property in and around Fairfield and New Haven Counties.
- Familiarity with Trumbull's Plan of Conservation and Development.

Scope of Services

The Town of Trumbull has identified six municipally owned properties that are underutilized at current, which the Town seeks to sell in order to reduce unnecessary expenses, and grow Trumbull's grand list in accordance with the Trumbull Plan of Conservation and Development and the Town may place restrictions on the redevelopment of the subject properties in order to ensure that any development is in

accordance with the Town's existing zoning regulations. The Town has recent appraisals, title searches and Phase I environmental reviews completed for each property. Properties addresses are listed below:

- 45 Berkshire Avenue
- 23 Pricilla Place
- 6254 Main Street
- 5892 Main Street
- 7115 Main Street
- 1 Veterans Circle

The Town of Trumbull reserves the right, in its sole discretion, to remove any of the above listings from consideration in the future. Several properties will require relocation of existing services. The Town will work with selected brokers on a case-by-case basis to define timelines associated with relocation needs. The Town may pursue a zone change on at least one property prior to sale. Details of the disposition of each property will occur during selection interviews.

The Town invites qualified Brokers or Broker teams to propose services for one or more of the properties listed. The Town reserves the right to award contracts to multiple brokers given the diversity of properties.

Required Services:

- Market analysis and pricing guidance for each property.
- Review conditions of properties.
- Establish a marketing strategy for each property that employs multiple types of advertising including but not limited to, internet, signs, trade publications etc...
- Listings in MLS or other professional listing services.
- Advertisement in local newspapers and real estate publications.
- Technical assistance on presentation of property.
- Meet with potential buyers, coordinate/show property, and receive proposals from buyers.
- Presentation of offers to Town staff and officials for consideration of sale.
- Assist Town with the close of accepted sales offers
- Attendance at Town meetings related to sale of property.
- Assist Town Attorney and staff in transaction/completion of the property sale.
- Other related services in order to realize the best outcome for Trumbull.

Please respond to all items below fully:

1. Please discuss your qualifications or the qualifications of your team in selling residential and commercial property in the Fairfield and New Haven County areas. Give specific information to document your successful history. Document any experience selling municipal property.

2. Provide background on your firm including the year your firm was founded, where you are located, and any specific experience you have had working with properties in Trumbull. Proposers and firms must have at least five (5) years of business experience selling Real Estate.
3. Confirm that your firm or team is licensed by the State of Connecticut to sell Real Estate.
4. Identify by address which properties you are proposing to sell. Discuss why your firm or team is best suited to sell each property.
5. Discuss your understanding of some of the goals of Trumbull's Plan of Conservation and Development and how those goals may in part be met by the sale of the property you would like to list.
6. Highlight available sources and strategies you will use to promote the sale of the property.
7. Describe in detail your proposed fee structure to provide the full array of services required to sell each property. Include details of all fees, expenses, commissions or other items requiring reimbursement. Note payment terms from the Town in connection to services provided.
8. Provide a brief cover letter with the Proposal submission and highlight any omissions or additional information you deem necessary to fully represent the capacity of your firm or the work to be performed. The letter shall clearly indicate that the respondent has carefully read all the provisions of the RFP. Please clearly note any confidential sections of the proposal.

During the evaluation of proposals, the Town of Trumbull reserves the right, where it may serve the Town's best interest, to request additional information or clarification from the Real Estate Agency submitting the RFP. There is no expressed or implied obligations for the Town of Trumbull to award this RFP. The Town reserves the right to reject any or all RFP proposals submitted or to award in full or part the property sales noted in the RFP. The Town of Trumbull is not obligated to award work to the lowest cost/fee proposer under this RFP. The Town reserves the right to award the RFP to multiple Real Estate firms or teams.

Proposals meeting the full proposal criteria will be evaluated by the First Selectman, an appointed committee of staff and officials, and the Purchasing Agent. Any acceptance of an offer to purchase Town owned property shall be subject to approvals by the Town and its governing bodies as required by Town Charter, Ordinances and Connecticut General Statutes.

Proposers may be requested to make oral presentations as part of the evaluation process. The evaluation committee will recommend contract award and the Town of Trumbull Purchasing Agent will issue and Award Letter for "Commercial and Residential Broker Services for Town Property Sales". Any award will be limited to the properties explicitly listed in this RFP. Upon acceptance of a recommendation, a contract will be negotiated respective to specific property sales (all or part) within this RFP.

Evaluation Criteria

It is the intent of the Town of Trumbull to conduct a fair and comprehensive evaluation of all proposals received. The contract (s) will be awarded to the proposer (s) who submit a proposal that is most advantageous to the Town of Trumbull as it relates to each specific property. All proposals will be evaluated based on the criteria listed below. Maximum points are specified for each criteria.

1. Suitability of the proposers plan for the specified property or properties.
(20 points)
2. Ability to satisfy the full Scope of Services for each property specified.
(20 points)
3. Demonstrated ability to sell Real Property in Fairfield and New Haven Counties.
(20 points)
4. Professional Qualifications of individuals assigned to project.
(10 points)
5. Responsiveness of Proposal.
(5 points)
6. Fee and Commission structure.
(5 points)
7. References.
(5 points)
8. Stability of Company.
(5 points)
9. Previous experience with the Town of Trumbull or sales in Trumbull.
(5 points)

Total Maximum point score = 100 for each property identified by proposer. The committee will seek to award each property to the most appropriate firm or team via the proposal evaluation process. Highest scoring proposers may be required to make oral presentations as part of the selection process.

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REFERENCES

(To be submitted with proposal – attach additional pages as necessary)

List references for similar services provided for at least four (4) clients in the past Three (3) years (attach any other client references if desired). PLEASE NOTE IT IS THE TOWN'S INTENT TO COMMUNICATE WITH THE REFERENCES LISTED HEREIN.

CLIENT 1:

Organization Name: _____

Contact Name: _____ Phone: _____

Service Dates: _____

Project(s): _____

CLIENT 2:

Organization Name: _____

Contact Name: _____ Phone: _____

Service Dates: _____

Project(s): _____

CLIENT 3:

Organization Name: _____

Contact Name: _____ Phone: _____

Service Dates: _____

Project(s): _____

CLIENT 4:

Organization Name: _____

Contact Name: _____ Phone: _____

Service Dates: _____

Project(s): _____

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The undersigned, in compliance with this RFP affirms, that it has examined the specifications and related documents contained herein and proposes to provide this service in accordance with this RFP and any contract documents within the periods set forth herein and at the prices agreed to.

The undersigned certifies that this proposal meets all the specifications, requirements and conditions requested herein. Any substitutions to the specifications requested are clearly and completely noted and attached. Any alternate proposals are presented in similar format as requested and are attached herein. It is understood that the Town reserves the right to reject any or all proposals.

)

PROPOSAL FEE STRUCTURE:

% _____

Please describe on a separate sheet of paper the proposed fee structure for the Real Estate Services your company will provide to the Town of Trumbull. It should describe all fees, expenses including but not limited to commissions and or any other expenses, which are considered reimbursed by your firm.

Company Name

by (Signature)

Address

Print Name (A Duly Authorized Representative)

State, Town, Zip

Title

Date

Telephone/Fax

Email

Website

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NON COLLUSIVE AFFIDAVIT OF BIDDERS

**- PROFESSIONAL SERVICES RELATED TO THE SALE OF TOWN
PROPERTIES**

State of (_____);

County of (_____).

I state that I am the _____ of _____
(Title) (Name of firm)

And that I am authorized to make this affidavit on behalf of my firm, and its owners, directors, and officers. I am the person responsible in my firm for the price(s) and the amount of this Bid.

I certify that:

- (1) The price and amount on this Bid has been arrived at independently and without consultation, communication, or agreement with any other bidder.
- (2) Neither the price(s) nor the amount of this Bid and approximate price(s) nor approximate amount of this Bid has been disclosed to any other firm or person who is a Bidder and that no disclosure of these items will be made prior to the Bid opening.
- (3) No attempt has been or will be made to induce any firm or person to refrain from proposing on this Bid, or to submit a Bid higher than this Bid, or to submit any intentionally higher or non-competitive Bid.
- (4) Neither the said Bidder nor any of its officers, partners, owners, representatives, employees or parties in interest, including this affidavit, has in any way colluded, conspired, connived or agreed, directly or indirectly with any other Bidder, firm or person to submit a collusive or sham Bid in connection with the Contract for which the attached Bid has been submitted or to refrain from Bidding in connection with such Contract, or has in any manner, directly or indirectly, sought by agreement or collusion or communication or conference with any other Bidder, firm or person to fix the price or prices in the attached Bid or of any other Bidder, or to fix any overhead, profit or cost element of the Bid price or the Bid price of any Bidder, or to secure through any collusion, conspiracy, connivance or unlawful agreement any advantage against the Town of Trumbull owner, or any person interested in the proposed Contract.
- (5) The Bid of my firm is made in good faith and not pursuant to any agreement or discussion with, or inducement from, any firm or person to submit a complementary or other non-competitive proposal.
- (6) I state that _____ understands and acknowledges that all
(Name of my firm)

Representations of this affidavit are material and important, and will be relied on by the Town of Trumbull in awarding a contract for which this is submitted. I understand and my firm understands that any misstatement in this affidavit is and shall be treated as fraudulent concealment from the Town of Trumbull of the true facts relating to the submission of Bids for this contract. That the Town of Trumbull also reserves the right to reject our Bid if failure to complete this document, have it notarized and submitted with our Bid documents.

The undersigned Bidder further certifies that this statement is executed for the purpose of including the Town of Trumbull to consider the Bid and make an award in accordance therewith.

Subscribe and Sworn to me this

_____ day of _____,
2017

Notary Public
My Commission Expires

Legal Name of Bidder

Business Address

Signature and Title of Person

Date

END OF BID