

**REQUEST FOR PROPOSALS (RFP):
COMMERCIAL LEASE BROKER**

A. Introduction and Purpose

The Public Health Institute (PHI) is a global leader in public health, dedicated to promoting health, well-being, and quality of life for people around the world through innovative solutions and collaborative partnerships. Additional information regarding PHI, PHI's programs and funders may be found at <https://www.phi.org/>.

PHI is seeking proposals in response to this RFP from qualified firms or individuals to provide a full range of tenant broker services to support in the selection of leased office space for PHI and its many programs in the San Francisco Bay Area, greater California, Washington D.C. metro area, and other domestic and international locations.

B. Scope of Work

PHI is dedicated to improving health and wellness by discovering new research, strengthening key partnerships and programs, and advancing sound health policies. During its more than 50 years as an independent nonprofit, PHI has led and managed hundreds of projects and programs ranging from small task order contracts to large, multi-site research programs with national and international significance. PHI partners with foundations, federal and state agencies, and other non-profit organizations to implement a diverse array of public health programs in California, the United States, and globally.

PHI has more than 200 programs which are funded by various donors. Office space needs for PHI are always very much in flux and changing on a regular basis as the result of programs ending, expanding, or new awards being administered.

PHI is currently a tenant at 555 12th Street in Oakland CA 94607, occupying the 2nd and 10th floors of office space in the 555 City Center building. Further, PHI is a tenant to additional office space throughout the San Francisco Bay area, greater California, Washington DC, as well as other domestic and international locations.

PHI is seeking commercial real estate brokerage leasing services for our headquarters office in Oakland California, as well as our programs in the surrounding SF Bay Area, greater California, Washington DC, and other locations as needed. The real estate broker and/or firm must be able to support PHI to identify and recommend appropriate office space as the need(s) arise in a timely fashion, negotiate lease terms and conditions, negotiate renewal terms and conditions, coordinate lease preparation and execution, review lease templates, work directly with PHI's Department of Operations and Office of General Counsel, develop regular market reports and analysis (e.g. traffic flow data, utilities information, zoning details) as needed, and provide other related services as required in the normal course of business.

C. Eligibility

Minimum Requirements and Qualifications for Participation in the RFP Process

PHI will accept and evaluate proposals only from bidders which meet all of the following criteria and requirements:

- 1.) Brokers should have a primary headquarters office located in the San Francisco / Oakland Bay Area.
- 2.) Within the last 12 months, has completed a minimum of 10 (ten) leasing transactions, of at least 2,000 rentable square feet each for Class A or B commercial office space.
- 3.) Significant experience working with nonprofits and/or fiscal sponsors. Additionally PHI would consider it a plus if bidder's portfolio of experience includes working with federally funded nonprofits. This is not a requirement for participation in the proposal process, but will be a factor in PHI's evaluation.
- 4.) Strong knowledge and understanding of the San Francisco / Oakland Bay Area and Washington D.C. real estate markets.

D. Submission Requirements

The bidder's proposal must provide a detailed response and supporting documentation, where requested, to each of the following areas:

A. Cover page

- Please include the name of your organization, address, and contact information.
- Please include the name, title, and contact information for an authorizing official.

B. Table of Contents

C. Company Information and Past Experience

- Provide a brief summary of your firm and its culture and a description of key staff proposed to be assigned to PHI's account (brochures and marketing materials may be included as an appendix, but should not take the place of a brief written response). Include your experience and expertise serving clients in the non-profit arena, and a summary of what differentiates your firm from your competitors.
- Indicate the primary physical location from which you will be providing your services.
- Provide a summary of your experience within the last 12 months with leasing transactions for Class A or B commercial office space.
- Provide a description of the techniques, approaches, strategies, and methods you or your firm uses, including any unique qualifications or capabilities with regard to negotiating lease terms and conditions, reviewing/preparing lease templates, coordinating lease preparation and execution, particularly where the funder of the lease is the US government or donor community.

D. Services Description

- What is included in your core benefits brokerage and consulting services?
- Are other services available? If so, please provide an overview.

E. Financial Capacity

- Provide a copy of your most recent audited financial statements. Were there any findings? If so, please explain.

F. Fee Proposal

- Describe your proposed form of compensation (i.e., commission, annual retainer, fee-for-service).
- Specify which services are included in this compensation and which services would require additional fees.

G. Credentials

- Provide copies of business licenses, professional certifications and affiliations, or other credentials, together with evidence that bidder, if a corporation is in good standing and qualified to conduct business in California and the United States.
- Provide a signed statement certifying bidder fully meets all minimum qualifications outlined in Section C Eligibility.

H. References

- Provide references with contact information from a minimum of three clients from the S.F. Bay Area, Southern California, Sacramento Region, or Washington DC Metro Area, who currently use bidder's services for leasing.

I. Sample Materials

- Include sample materials that are representative of the support you provide your clients. These might include sample listings, meeting materials, contracts, etc.

E. Proposal Format

In order for PHI to conduct the most efficient proposal evaluation, bidders are required to organize their proposals as following information in their proposals as noted below:

- A. Cover Page**
- B. Table of Contents**
- C. Company Information and Past Experience**
- D. Services Description**
- E. Financial Capacity**
- F. Fee Proposal**
- G. Credentials**
- H. References**
- I. Sample Materials**

Proposals must be organized according to the submission requirements. Proposals must not exceed 20 pages, Times New Roman Font, size 12. Cover page, table of contents and sample materials are not included in the page limitation.

Proposals which fail to address each of the submission requirements above may be deemed non-responsive and will not be further considered. Note that responses to RFP requirements must be specifically answered within the context of the submitted proposal. PHI's evaluation team will not refer to a designated website, brochure or other location for the requested information. Responses that use references to external materials as an answer will be considered non-responsive.

F. Submission of Proposals & Closing Time

Please submit proposals to: **Crystal Flexman, Special Project Manager**
Public Health Institute
1825 Bell Street, Suite 102
Sacramento, CA 95825
Email: crystal.flexman@phi.org

Proposals are due by: **Sunday June 3, 2018**
5:00pm – Pacific Standard Time

All questions pertaining to this RFP must be made via email to crystal.flexman@phi.org

G. Proposal Timeline and Evaluation

1. Proposal Timeline

PHI intends to follow the below timeline for review and award of this solicitation:

- Deadline for Submittal: June 3rd at 5:00 p.m. (PT)
- Review of Proposals: June 4-8, 2018
- Interviews or Additional Questions Conducted: June 11, 2018
- Broker Selected: June 18, 2018

2. Proposal Evaluation

PHI is committed to a transparent process of commercial real estate selection, including the selection of a commercial real estate lease broker with the intention to secure the best possible real estate solution(s) for PHI's ongoing needs while ensuring an optimal financial and operational outcome and the best value to our funders.

An evaluation team will review, in detail, all proposals that received to determine the highest scored bidder. Following the initial review and screening of the written proposals, using the selection criteria

described below, bidder(s) will be invited to participate in the final selection process, which may include participation in an oral interview and or submission of any additional information as requested by PHI.

The following evaluation criteria will be utilized to evaluate the proposals by an internal evaluation team from PHI to determine the highest scored bidder. A bidder can receive a maximum of 100pts:

- A) Company Information and Past Experience (45%)
- B) Services (20%)
- C) Financial Capacity (5%)
- D) Fees (10%)
- E) Credentials (5%)
- F) References (15%)

H. Solicitation Terms

1. Agreement

PHI intends to issue an exclusive agreement for a base period of up to five (5) years to the successful bidder from this procurement process.

2. Discretion

PHI may, at its sole discretion and after the evaluation process, choose not to issue any agreement as a result of this process. PHI may also, at its sole discretion, choose to issue as many or as few agreements as deemed necessary to meet PHI's business needs.

3. Offers/Quotations

Prices must be inclusive of all costs, including taxes and fees, in US Dollars. Quotes and prices should remain valid for ninety (90) calendar days from proposal submission.

4. Proposal Costs

There is no reimbursement for costs associated with preparing or submission of proposals in response to this RFP or costs associated with possible award negotiation.