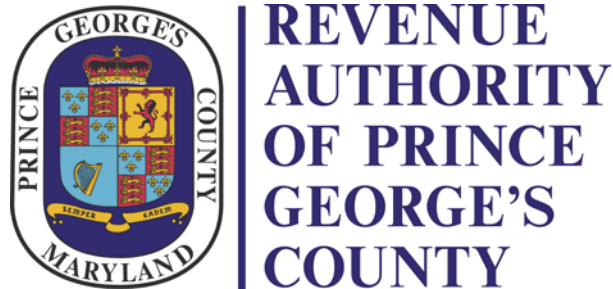


Revenue Authority of Prince George's County



Request for Proposal (RFP) No. 2020-REAS for Real Estate Advisory Services

Issue Date: August 28, 2020

**Deadline for Questions: September 18, 2020 at 3PM
EST**

Proposal Due Date: October 26, 2020 at 3PM EST

WARNING: Vendors who have received this document from a source other than the Issuing Office should immediately contact the Issuing Office and provide their name and mailing address in order that amendments to the RFP or other communications can be sent to them. Vendors who fail to notify the Issuing Office with this information assume complete responsibility in the event that they do not receive communications from the Issuing Office prior to the closing date.

Offerors, referred to herein as Offeror or Proposer, are cautioned not to make changes to any of the terms and conditions in this solicitation. Doing so may render an Offeror's proposal unacceptable and subject to rejection. Questions and comments must be addressed to the point of contact identified in Section A-1, Item 9 of this document.

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1. SECTION I: INTRODUCTION

1.1. Summary Statement

The Revenue Authority of Prince George's County ("RAPGC") is seeking real estate advisory services for initiatives such as, but not limited to: acquisition, disposition, and development of real properties; privatization of existing RAPGC assets to increase revenues through creative and cooperative arrangements with the private sector; selective engagement of private developers to assume risk and provide financing and management capabilities for capital projects; and support to the RAPGC in negotiating and documenting agreements and in providing on-going advice and assistance in such other matters that may require real estate advisory services.

1.2. Proposal Closing Date

The proposer must submit via email to:

REDevelopment@co.pg.md.us

Proposals must be received, by the Revenue Authority
no later than October 26, 2020 at 3:00 PM EST.

Late proposals will not be considered.

1.3. Questions and Inquiries

Questions and inquiries must be submitted via email no later than twelve business days prior to the Request for Proposals closing date to: REDevelopment@co.pg.md.us. Phone calls or faxed questions will not be accepted. All questions and answers will be posted to the RAPGC website no later than ten business days prior to the closing date. All potential respondents are responsible for checking the RAPGC website for any addendums. Proposal Acceptance RAPGC reserves the right to accept or reject any and all proposals, in whole or in part, received as a result of the solicitation and to waive minor irregularities.

1.4. Proposal Acceptance

RAPGC reserves the right to accept or reject any and all proposals, in whole or in part, received as a result of the solicitation and to waive minor irregularities. Further, the RAPGC reserves the right to make a whole award, partial award or no award at all.

1.5. Duration of Proposal Offer

Proposals are held valid for six (6) months following the closing date for this RFP. This period may be extended by mutual written agreement between the Respondents and the RAPGC.

1.6. Notice to Respondents

Before submitting a proposal, Respondents are to completely familiarize themselves with the requirements of the solicitation. Failure to do so will not relieve the Respondent of responsibility to fully perform in accordance therewith. No consideration will be granted for any alleged misunderstanding of the material to be furnished or work to be done; it being fully understood that the submission of a proposal is an agreement with all the items and conditions referred to herein.

2. SECTION II: GENERAL INFORMATION

2.1. Economy of Preparation/Incurred Expenses

Proposals should be prepared simply and economically, providing a straightforward, concise delineation of the Respondent's capabilities and description of the offer to meet the requirements of this RFP. RAPGC will not be responsible for any costs incurred by any Respondent in preparing and submitting a response to this solicitation.

2.2. Addenda to the Request for Qualifications

If it becomes necessary to revise any part of this RFP, Addenda will be provided on the RAPGC website before the closing date of this RFP. It is the responsibility of all potential respondents to regularly check the RAPGC website for any Addenda.

2.3. Interviews

RAPGC reserves the right to conduct individual interviews with finalists and to request best and final offers from any or all finalists. Those Respondents may be required to provide oral presentations to discuss their proposal, answer questions from the RAPGC's Proposal Analysis Group, and/or clarify their technical submittal.

2.4. Confidentiality/Proprietary Information

Respondents must specifically identify those portions of their proposals, if any, which they deem to contain confidential, proprietary information or trade secrets and must provide justification why such material should not, upon request, be disclosed by the Revenue Authority in accordance with the Maryland Freedom of Information Act, 10-601 et. seq., State Government Article, Maryland Annotated Code. Respondents must clearly indicate each and every page that is deemed to be confidential/proprietary or a trade secret (it IS NOT sufficient to preface your proposal with a proprietary statement).

2.5. Allowance of In-Housework

No section or portion of this RFP or the Contract shall be construed or interpreted to preclude the Revenue Authority from accomplishing any task or undertaking of any operation or project utilizing its own work force.

2.6. Formation of Agreement/Contract with Successful Contractor

The Contract to be negotiated as a result of this RFP (the "Contract") shall be by and between the Respondent as Contractor and RAPGC and shall contain provisions included in this RFP. By submitting a proposal in response to the RFP, the Respondent accepts the terms and conditions set forth herein.

2.7. Affidavits, Certifications, and Affirmations

Respondents are required to submit with their proposal certain certifications, affirmations and affidavits. These forms, which should be completed by all Respondents, are included as Appendices of this RFP.

3. SECTION III: CONTRACT SCOPE

3.1. Background

RAPGC is seeking real estate advisory services for initiatives such as, but not limited to: acquisition, disposition, and development of real properties; privatization of existing RAPGC assets to increase revenues through creative and cooperative arrangements with the private sector; selective engagement of private developers to assume risk and provide financing and management capabilities for capital projects; and support to the RAPGC in negotiating and documenting agreements and in providing on-going advice and assistance in such other matters that may require real estate advisory services. Real estate projects may, for example, be related to multi-family housing, office/commercial development, and guest services.

Offerors must demonstrate a clear understanding that the above initiatives will be undertaken only in support of the RAPGC's real estate development mission. The driving factor is not to use development or revenues for their own sake but rather to use RAPGC assets and resources in ways, which can most effectively address current and future needs, opportunities to enhance the community, and opportunities to expand the tax base while advancing local government interests.

While a local presence is not required, Offerors must demonstrate readiness and accessibility, as the selected firm(s) will be considered a vital part of RAPGC's real estate team and, as such, is expected to be available for short turnaround on various items as well as for regular briefings, meeting updates, conference calls and/or phone inquiries. To assist in identifying opportunities and in framing such arrangements, offerors must demonstrate experience and expertise in the field of real estate development, facilities operation and public finance. Services will be largely contracted on an as-needed, task order basis and will require some ad hoc activities.

Offerors must include sufficient documentation of an array of previous projects or tasks that conveys the proposer's strengths, ability and experience in providing effective advisory services in such areas.

3.2. Sample Tasks

The following are illustrative examples of potential work programs or task orders:

- A. Act as Owner's agent on behalf of the RAPGC for leasing/out leasing of properties and acquisition/disposition of properties.
- B. Negotiate on behalf of the RAPGC to leverage real property assets as part of development proposals and/or land transactions involving both the public and private sector.
- C. Act as an advisor to the owner in order to provide recommendations on real estate transactions including, but not limited to acquisition/disposition investment, development and land deals.

- D. Evaluate market conditions and financing strategies for various land use and development opportunities including but not limited to the multi-family rental market, office, hospitality and retail.
- E. Inform the RAPGC regarding local real estate market conditions, activities and development plans, which may impact the RAPGC and its local environment. This may be accomplished through periodic briefings, written reports, and telephone contacts as appropriate.
- F. Provide strategic review, analysis and recommendations regarding the availability of leased space, property acquisitions/dispositions and related reporting.
- G. Identify and advise on priorities for real estate development opportunities in which the RAPGC might appropriately participate.
- H. Assess the financial impact and/or economic feasibility of selected initiatives, which may be identified by the RAPGC or its advisor.
- I. Consider the opportunities and impacts of the RAPGC and County plans / programs in relation to existing and planned surrounding area transportation infrastructure and means for accommodating planned growth.
- J. Prepare offering memoranda and other documents necessary to the conduct of development projects and other real estate transactions.
- K. Advise the RAPGC on sources of public and private capital, how they can be most efficiently accessed, and the terms and conditions appropriate to specific public-private relationships.
- L. Establish strategies and criteria for evaluating real property development proposals and assist in developer review and selection processes..
- M. Assist the RAPGC in monitoring the performance of selected real estate developers and firms providing facility management and related services.
- N. Provide valuation and appraisal services for specific properties, as required.
- O. Prepare and make presentations to RAPGC Board of Directors, County officials and to any other external bodies upon request.

- P. Assist RAPGC staff in coordinating among local, county, state, and federal agencies as applicable to establish the feasibility of potential development opportunities.
- Q. Evaluation of innovative financing strategies, such as Tax Increment Financing, Bond Revenue and financing, and Special Tax Districts.
- R. Evaluation of public/private partnerships, redevelopment authorities, parking districts and other entities to achieve land use or development objectives.

4. SECTION IV: PROPOSAL SUBMITTALS

4.1. Submission Outline

Each response shall have the following sections prominently displayed:

1. Title Page
2. Table of Contents
3. Advisory Team Corporate Structure & Capacity
4. Previous Experience Working with Local and MBEs
5. Personnel with Professional Real Estate Certifications
6. Previous Experience with Community Engagement
7. Statement of No Conflict of Interest
8. Statement of No Pending or Threatening Litigation
9. Certificate of Good Standing
10. Exceptions or Restrictions

4.2. Outline Description

Transmittal Letter: The proposal shall include a transmittal letter prepared on the Respondent's business stationery. The purpose is to transmit the proposal; therefore, it should be brief. An individual who is authorized to bind the firm to all statements, including services and prices, contained in the proposal, must sign the letter in ink.

Title Page: Each response shall begin with a Title Page. It should display the words "RFP No. 2020-REAS." It should also have the name of the company, and name, title, business address and telephone number of the person authorized to obligate the company.

Table of Contents: The response should contain a "TABLE OF CONTENTS" with page numbers indicated.

Response: The Respondent shall present their offer on double spaced typed pages. Respondent must address each of the areas covered under the evaluation criteria in the order as provided below:

The Development Team and Capacity: Respondents must submit the key members of the proposed advisory team including the lead advisor, proposed partners, if any, and legal counsel. Resumes for each key member of the team should be submitted and shall be limited to two pages each. Descriptions of successfully completed projects by the team members of similar scope to the one proposed shall be included. The

proposed corporate structure of the advisory team must also be described. The lead advisor must submit evidence of expert knowledge

Experience working with Local and Minority Business

Enterprises: RAPGC seeks to have County-based local and minority participation at all levels of the contract. Respondents should provide examples of percentages of previous contracts completed by local and minority-owned businesses.

No Conflicts of Interest: The Respondent is required to make a statement of known knowledge of any potential conflicts of interest with RAPGC or Prince George's County.

No Pending Litigation: The Respondent must affirm that they are not party to any pending litigation against RAPGC or Prince George's County.

Exceptions or Restrictions: Should the Respondent take exception to any provision or requirement of the RFP; it must be indicated in this section.

¹ A minority-owned business is defined as a business which is at least 51% owned by one or more minority group members; or, in the case of publicly owned business, on in which at least 51% of its voting stock is owned by one or more minority group members, whose general management and daily business operations are controlled by one or more such individuals and which has been certified by the Supplier Development and Diversity Division as a Minority Business Enterprise pursuant to Division 6 of this Subtitle. Minority group members include, but are not limited to, Black Americans, Hispanic Americans, Native Americans, Asian Pacific Americans and Asian Indian Americans, and Hasidic Jewish Americans.

5. SECTION V: EVALUATION AND SELECTION PROCESS

5.1. Selection Process

The Respondent that best meets with RAPGC requirements in this solicitation, including the Advisory Objectives, will be selected.

5.2. Evaluation and Selection Committee

A Proposal Analysis Group (PAG) will evaluate all proposals received by the closing deadline. The PAG may request additional technical assistance from any resource at its discretion.

5.3. Qualifying Proposals

The PAG shall review each Proposal for compliance with the requirements of this RFP as set forth in Section IV. Failure to comply with any requirements of this procurement may disqualify a Respondent's Proposal. RAPGC reserves the right to waive a requirement and/or minor irregularities when it is in RAPGC's best interest to do so. Proposals will not be opened publicly. RAPGC also reserves the right to request supplemental information from Respondents during the evaluation period.

5.4. Evaluation Criteria

Each proposal received as a result of this RFP shall be subject to the same review and evaluation process. The following criteria will be used in the evaluation of submitted proposals:

Experience, Qualification and Capability of Firm	45 Points
Personnel	25 Points
Local and MBE Experience	15 Points
Professional Certifications	10 Points
Community Engagement Experience	5 Points

Experience, Qualification and Capability of Firm (45 Points)

- How substantial is the firm's recent experience in the design of projects of comparable size and complexity?
- How substantial is the firm's experience in developing mix-used projects?
- What is the extent of projects designed and completed over the last five (5) years?
- Was the work finished within budget and on time? Does the firm have the ability to control project cost through design and effectively participate in continuous value engineering process with the construction manager?
- Is the firm knowledgeable regarding Prince George's County code and regulations governing construction?
- Projects currently under construction and/or recently completed projects of comparable scope and any projects that were a public/private partnership.
- Provide a list of completed retail or restaurant projects
- Firm has the ability to secure project funding, including current relationship with major lenders and exhibits a history of successfully securing funding for previous projects.
- Ability to provide sufficient project equity to demonstrate commitment to the success of the project and to satisfy conventional lender requirements
- Ability to provide sufficient project equity to demonstrate commitment to the success of the project and to satisfy conventional lender requirements

Personnel (25 Points)

- Do the proposed personnel have the appropriate experience and capabilities to develop this project?
- Is the firm organized to work and communicate efficiently and to stay on schedule?
- Does the firm's organizational structure appear to be strong?
- What is the principal's level of involvement in the project?
- Does the proposed development firm demonstrate experience in retail projects or restaurant park-project?

Professional Certifications (10 points)

- Does the firm have team members whom hold the CCIM, or other professional real estate designation?
- Is the advisement manager or any other members of the advisory team (excludes consultants) hold the CCIM, or other professional real estate, designation?

Local and MBE Experience (15 Points)

- **Minority Business Enterprise** means any business enterprise:
 - Which is at least fifty-one percent (51%) owned by one or more minority individuals, or, in the case of any publicly owned corporation, at least fifty-one percent (51%) of the stock of which is owned by one or more minority individuals; and
 - Whose general management and daily business affairs and essential productive operations are controlled by one or more minority individuals; and
 - Which has been certified by the Supplier Development and Diversity Division as a Minority Business enterprise pursuant to Division 6 of this Subtitle.
- **Local**
 - County-based business means a business whose principal place of operation is located within Prince George's County that meets the requirements of Section 10A-163(a), of the Prince George's County Code and whose application for certification as a County-based business the Purchasing Agent approves.
 - County-based small business means a business that meets the requirements of Section 10A-161(b) of the Prince George's County Code and whose application for certification as a County-based small business is approved by the Purchasing Agent.

Community Engagement (5 Points)

- The respondent should describe previous engagement in working with the local community stakeholders and soliciting their input on the development project and making them feel part of the process.

5.5. Final Ranking and Selection

The evaluation criteria contained herein shall be scored by the PAG based upon the stated weight factors for each evaluation criteria. The PAG will make recommendations to the Executive Director for award of the exclusive right to negotiate a Development Agreement with the RAPGC. Based on the PAG's initial review of proposals, RAPGC may invite, without cost to itself, ranking finalists to make a presentation to the PAG of their proposal and their capabilities as a further consideration in the selection process. RAPGC reserves the right to make an award with or without negotiations or to request best and final offers. Only those Respondents who are deemed to be reasonably susceptible of being selected for award shall be offered the opportunity to participate in this process. RAPGC also reserves the right to request supplemental information including, but not limited to, audited and unaudited financial statements of all equity partners.

5.6. Property of RAPGC

All proposals submitted in response to the Request for Qualifications become property of the RAPGC and may be appended to any formal documentation, which would further define or expand the contractual relationship between the RAPGC and the successful Respondent.

APPENDIX A-1

VENDORS OATH AND CERTIFICATION

Pursuant to Subtitle 10, Section 10A-110 of the Prince George's County Code, the Purchasing Agent requests as a matter of law that any contractor receiving a contract or award from Prince George's County, Maryland, shall affirm under oath as below. Receipt of such certification, under oath, shall be a prerequisite to the award of contract and payment thereof.

"I (We) hereby declare and affirm under oath and the penalty of making a false statement that if the contract is awarded to our firm, partnership or corporation that no officer or employee of the County whether elected or appointed, is in any manner whatsoever interested in, or will receive or has been promised any benefit from, the profits or emoluments of this contract, unless such interest, ownership or benefit has been specifically authorized by resolution of the Board of Ethics pursuant to Section 1002 of the Charter of Prince George's County, Maryland; and

I (We) hereby declare and affirm under oath and the penalty of making a false statement that if the contract is awarded to our firm, partnership or corporation that no member of the elected governing body of Prince George's County, Maryland, or members of his or her immediate family, including spouse, parents or children, or any person representing or purporting to represent any member or members of the elected governing body has received or has been promised, directly or indirectly, any financial benefit, by way of fee, commission, finder's fee, political contribution, or any other similar form of remuneration and/or on account of the acts of awarding and/or executing this contract, unless such officer or employee has been exempted by Section 1002 of the Charter of Prince George's County, Maryland.

Handwritten Signature of Authorized Principal(s):

Name: _____ Title: _____

APPENDIX A-2

STATEMENT OF OWNERSHIP AND BIDDER QUALIFICATION AFFIDAVIT

Part A below requires a business entity, when responding to a bid or proposal solicitation, to provide a statement

Of ownership as a condition of eligibility to receive a contract from Prince George's County.

Part B is an affidavit of "No Conviction" for bribery, attempted bribery, or conspiracy to bribe, and is required under Section 16-311 of the Maryland State Finance and Procurement Article.

NOTE: Submission of completed document is prerequisite to award.

PART "A" - OWNERSHIP Data

1. Full name and address of business

City and State _____ Zip _____ Bus. Phone w/area code _____

2. Is the business incorporated? _____ Yes _____ No

3. Other names used by business i.e., T/A _____

Non-Corporate Business

If response to Item #2 above is No, list the name and business and residence address of each individual having a ten percent (10%) or greater financial interest in the business.

Name _____ Business Address _____

Corporate Business Entities

Is the corporation listed on a National Securities Exchange? _____ Yes _____ No

4. List the names of all officers of the corporation, their business and residence addresses and the date they assumed their respective offices.

Residence	Date	Office
Name	Office	Business/Address
		Assumed

5. List the names of all members of the current Board of Directors, their business and residence addresses, the date each member assumed office and the date his/her term as a Director shall expire (if any).

Date	Date Term of	Office Assumed	Office Expires
Name	Business/Address		

6. List the names and residence addresses of all individuals owning at least ten percent (10%) of the shares of any class of corporate security, including but not limited to stocks of any type or class and serial maturity bonds of any type or class.

Name	Residence Address
------	-------------------

APPENDIX A-2

This Financial Disclosure Statement has been prepared by _____

_____ on this _____ day of _____,
20_____.

Signed by Preparer

PART "B" - AFFIDAVIT (BIDDER'S QUALIFICATION STATEMENT)

1. I am the _____ of _____
a party interested in obtaining a contract with Prince George's County under conditions set forth in documents for Bid No. _____.
2. Upon examination of relevant records and to the best of my knowledge, no officer, director, partner or employees of the aforementioned business entity has on the basis of acts committed after July 1, 1977, been convicted of, or entered a plea of nolo contendere to, a charge of bribery, attempted bribery or conspiracy to bribe under the laws of the State of Maryland, any other state, or the federal government other than those listed on the attachment to this affidavit (attachment should list name, title, offense, place and date of conviction or plea);
3. I have been authorized to make this statement on behalf of the aforementioned party.

(Signature)

ACKNOWLEDGMENT (Corporate)

I, _____
certify that

Name (Printed)

I am the _____ of

_____ and that

Title and Business Entity

_____ who signed the above
Affidavit

Name (Printed)

is _____ of said entity;
that

Title

I know his/her signature, and his/her signature thereto is genuine; and that the above Affidavit/Statement of Ownership was duly signed, sealed, and attested for in behalf of said entity by authority of its governing body.

Further, under penalty of perjury I solemnly affirm that the contents of the foregoing Affidavit and Statement of Ownership are true to the best of my knowledge, information and belief.

(Name Printed) (SEAL)

(Signature) (SEAL)

Corporate Seal (as applicable) (SEAL)