

CITY OF PACIFIC GROVE
DEPARTMENT OF COMMUNITY DEVELOPMENT
HOUSING DIVISION

NOTICE INVITING SEALED PROPOSALS FOR
PROPERTY MANAGEMENT SERVICES

The City of Pacific Grove (City) invites sealed proposals for Property Management of the City owned Poet's Perch also known as 140 18th Street. All proposals submitted shall meet the following terms and conditions:

1. Proposals shall be delivered to the office of the City Clerk at City Hall, 300 Forest Avenue, Pacific Grove, CA 93950, not later than 2:00 PM on June 21, 2019, at which hour and date all proposals will be publicly opened. Proposals shall be submitted in a sealed envelope, and the outside of the envelope shall be clearly marked, "PROPERTY MANAGEMENT SERVICES: POET'S PERCH". It is sole responsibility of the bidder to see that the bid is received in proper time. Any proposals received after the scheduled closing time shall be rejected.

2. Any bidder may withdraw his or her bid, either personally or by written request at any time prior to the scheduled closing time for receipt of proposal, but no bidder may withdraw his or her bid for a period of thirty (30) days after the opening thereof.

3. All proposals submitted shall include a completed "Proposal", identifying unit costs and qualifications to do the work. The work performed under this contract must conform to requirements of the specifications, which are included in the bidder package.

4. The contract will be awarded to the bidder whose work, in the opinion of the City will best meet the requirements of the City. It is clearly understood by all bidders that the City reserves the right to reject any and all proposal and to waive informalities in said proposal.

5. A Bidder's Package, including bidder specifications, special requirements and sample contract and forms may be viewed and an electronic copy can be obtained at the City Clerk's Office, located at 300 Forest Avenue, Pacific Grove, CA, 93950, (831) 648- 3181.

6. The contact person for technical questions concerning project specifications, the bid process and general project information should be directed to Terri Schaeffer, Senior Program Manager, City of Pacific Grove, via e-mail at tschaeffer@cityofpacificgrove.org or by phone at (831) 648-3182.

Dated: May 31, 2019


Sandra Kandell, City Clerk



**CITY OF PACIFIC GROVE
HOUSING DIVISION
REQUEST FOR PROPOSAL
FOR PROFESSIONAL SERVICES**

PROPERTY MANAGEMENT SERVICES FOR THE POET'S PERCH

PROPOSAL SUBMITTAL DEADLINE:

DATE: June 21, 2019

TIME: 2:00 PM

LOCATION: CITY OF PACIFIC GROVE

**PROJECT MANAGER: TERRI SCHAEFFER, CITY OF PACIFIC
GROVE, SENIOR PROGRAM MANAGER**

**CITY OF PACIFIC GROVE
COMMUNITY DEVELOPMENT DEPARTMENT
300 FOREST AVENUE
PACIFIC GROVE, CA 93950
(831) 648-3183**

REQUEST FOR PROFESSIONAL SERVICES

TITLE: Professional services for Property Management of the Poet's Perch

I. General Information

Information about City of Pacific Grove

The City of Pacific Grove (City) has a population of 15,545 and offers an unparalleled quality of life. Sharing borders with the Monterey Bay, City of Monterey, Pacific Ocean, and the Del Monte Forest, Pacific Grove is approximately 2.86 square miles and 55.2 miles in streets length.

We are known for our small-town hospitality and friendliness in a place we simply call "PG" The City website is www.cityofpacificgrove.org.

II. INTRODUCTION

The City is seeking proposals from qualified individuals or firms to provide Property Management Services for the city-owned property known as the Poet's Perch at 140 18th Street in Pacific Grove. These services are based on rent receivables. The contractor must be able to provide these services in a timely manner when tenants are qualified and the property is occupied.

III. Objective

The City is soliciting proposals for a full service property management company to manage the city-owned property located at 140 18th Street, a 2 bedroom, 2 bathroom single family dwelling unit also known as the Poet's Perch. The City intends to rent the residence as a full-market rental to fund the City's Poetry Program administered by Pacific Grove Public Library. Proposals are for a one (1) year Agreement, with an option to extend up to an additional four (4) years.

IV. Scope of services

A. Project Description

This project involves experienced property management to screen and select potential tenants, to respond to tenant inquiries, to prepare and administer lease agreements, collect security deposit and rent.

The bidder shall thoroughly examine and become familiar with all parts of this Request for Proposal (RFP) requirements and specifications, the nature and scope of the work detailed, and all local, state and federal regulations, as it pertains to this RFP.

Professional services are required and the City is not precluded from considering price once satisfied the bidder has the demonstrated competence and necessary qualifications. The selection for professional services will be based on the contractor's demonstrated competence and the professional qualifications necessary for the satisfactory performance of the services required.

B. Description of Required Services

1. Establish fair market rent value during each rental period.
2. Advertise for lease of the property, screen and select tenants using at minimum, credit application, personal and business reference checks and personal interviews.
3. Provide an affirmative marketing plan and tenant selection procedure that ensures that prospective tenants are not discriminated against due to race, religion, national origin, familial status, etc., in compliance with the Fair Housing Act.
4. Execute, administer and enforce terms of all rental agreements, in compliance with federal, state and local laws and provide copies of executed agreement to the City.
5. Represent the City's interest in all matters involving the tenant under the lease agreement.
6. Collect rents, fees and late charges and collect and disburse security and other deposits in accordance with City Finance Department procedures.
7. Change electrical, gas, garbage, sewer and water billing as required between property occupancies.
8. Manage and resolve conflicts among tenants. Document and keep a record of communications with tenants on issues and complaints, and resolutions to such.
9. Terminate tenancies and serve notices as appropriate, recover possession of premises, recover rent and other sums due.
10. Institute legal action in the name of the City; settle, compromise or release such upon City consultation and approval; and, appear in court when necessary.
11. Provide 24-hour emergency contact for emergency repairs and report emergencies to the City by the next business day.

12. Monitor properties on a regular basis for repairs and preventive maintenance, and after conferring with the City, contracting with subcontractors to provide repair, maintenance, janitorial, landscaping and pest control services, as needed.
13. Manage and oversee any improvements or modifications made to properties. Ensure independent contractors have necessary licensing and insurance coverage.
14. Conduct a final inspection when the property is vacated, with a move out inspection report forwarded to the City.
15. Provide a monthly report/statement for the property clearly indicating the rental income received, income charged for services, what those services are, vacancies, turnover schedule and budget for unit/property maintenance. The City reserves the right to request further information from the chosen property management professional.
16. Perform and record an annual inspection of property in compliance with Housing Quality Standards and the California Building Code.
17. Have access to skilled specialists for repair and maintenance work and have ability to address property maintenance in a timely manner and property related emergencies on a 24-hour a day basis.

V. Requirements

The submitted proposal should include qualifications for facilitating the Scope of Work and experience along with the BID PROPOSAL FORM

a. The proposal must include detailed description of the following:

- Qualifications and Experience – summarize your firm’s qualifications, experience and special expertise in providing the type of services identified in the project description, include resumes of key personnel.
- Project Approach – provide a brief overview of your property management philosophy, methods and practices and how they would meet the needs identified in the requested services section.
- Describe how communication and reporting would occur between your firm, the tenants and the City.
- Pricing Methodology – provide base property management fees expressed as a fixed monthly fee for property management services. Any additional fees (above the fixed fee) should be itemized as a separate line item and priced as a

cost reimbursement plus administrative markup with the markup clearly identified.

- References: include a list of references (including contact names, telephone numbers and email addresses) of at least three (3) recent or current properties managed by your firm within the last four years of the same size and nature. The City reserves the right to contact references without prior notification.
- Proposals must be made in the official name of the firm or individual under which the business is conducted (showing official business address) and **MUST BE SIGNED** by a person duly authorized to legally bind the person, partnership, company or corporation submitting the proposal. A corporation must indicate place and date of incorporation.
 - The successful bidder must possess the following:
 - Valid California Driver's License
 - Valid real estate broker's license with CA Department of Consumer Affairs, Bureau of Real Estate, desired.

b. Proposal Content Requirements

- Title Page
- Narrative about why your company is uniquely qualified for selection
- Experience and Qualifications
- Cost of service

c. Expected Timeline

- RFP issued- May 31, 2019
- RFP closes- June 21, 2019

VI. Addenda to the Request for Proposals

In the event that it becomes necessary to revise any part of this RFP, addenda will be provided to all those invited to respond.

VII. Submission of Proposals

Sealed proposals are being requested for PROPERTY MANAGEMENT SERVICES, to the City of Pacific Grove, in accordance with all terms and specifications contained herein.

One (1) hard paper copy of sealed Proposals must be received by June 21, 2019 to the address below by 2:00 PM.

All sealed Proposals must be plainly marked in the lower left-hand corner, "Property Management Services for the Poet's Perch" and sent to the following address:

City of Pacific Grove City Clerk's Office
Attn: Sandra Kandell
300 Forest Avenue
Pacific Grove, CA 93950

Questions concerning the RFP or contract related questions can be addressed to Terri Schaeffer, Senior Program Manager. Ms. Schaeffer can be reached at tschaeffer@cityofpacificgrove.org or by phone at 831-648-3182. Clarifying questions are encouraged as we believe these will add to the quality of the proposals. All additional questions received, and the City's response will be posted on the City website at www.cityofpacificgrove.org

VIII. Late Proposals

Late proposals will not be accepted.

IX. Evaluation and Selection Process

The City will make every attempt to evaluate the proposals quickly.

X. Contract

The contracted firm or individual will be required to sign a contract with the City relating to the work to be performed. Sample contract available in the City Clerk's office.

XI. Response Material Ownership

The material submitted in response to the RFP becomes the property of the City and will be returned to the Contractor only at the City's option. Responses may be reviewed by any person after the final selection has been made. The City has the right to use any or all ideas presented in reply to this request. Disqualification of a Contractor does not eliminate this right.

XII. Acceptance of Proposal Content

The contents of the proposal of the successful Contractor may become contractual obligations if the City wishes to execute a contract based on the submitted proposal. Failure of the successful Contractor to accept these obligations in a contract may result in cancellation of the award and such Contractor may be removed from future solicitations.

XIII. Reference Checks

The City reserves the right to contact any reference or any client listed in the documents for information which may be helpful to the City in evaluating the Contractor's performance on previous assignments.

XIV. General Conditions of RFP

- a. The City reserves the right to reject any and all proposals, to waive any informality, to request interviews of Contractor prior to award and to select and negotiate the professional services in the best interest of the City.
- b. The Contractor shall guarantee to perform the services offered and the total price of the proposal for a period of not less than 60 days from the deadline for submission of proposals.
- c. The City reserves the right to accept all or part of any proposal, and to negotiate a contract for services and cost with the selected Contractor.
- d. The Contractor shall provide all necessary personnel, materials and equipment to perform and complete all work under this proposal.
- e. The Contractor shall be unbiased and vendor neutral.
- f. The City intends to award a contract for the requested services within one (1) month of receipt of the proposals. The Contractor shall be prepared to commence work immediately upon execution of a contract with the City.
- g. Unless otherwise stated, Contractor invoices are to be submitted to the Housing Division upon delivery of service to the City. The invoice must include an itemization of all services provided, including unit list price, net price, extensions total amount(s) due, and amounts previously paid.
- h. Unless otherwise stated, payment will be made within thirty (30) days of the completion of the service, in an acceptable fashion, to the City and receipt of invoice, whichever is later.
- i. This contract will be for the services described in the RFP response; however, this agreement should not be considered exclusive. As deemed necessary, the City reserves the right to obtain these services from any other vendor.
- j. Unless otherwise specified all costs listed are firm for the term of the contract.
- k. Neither party shall be liable for any inability to perform its obligations under any subsequent agreement due to war, riot, insurrection, civil commotion, fire, flood, earthquake, storm or other act of nature.

- l. Notification of the parties shall be considered to have been constructively received when it is mailed via the United States Postal Service, delivered in hand or by email to the parties as stated in the contract.
- m. Proposal shall also mean quotation, bid, offer, qualification/experience statement, and services. Proposers shall also mean vendors, proposers, or any person or firm responding to a Request for Information.
- n. All contracts entered into by the City shall be governed by the Laws of the State of California. Venue shall be in Monterey County, City of Pacific Grove.

BID PROPOSAL FORM

FOR PROPERTY MANAGEMENT OF CITY-OWNED PROPERTY

Date: _____

I/We _____ the undersigned, do hereby propose to furnish the City of Pacific Grove, California, a PROPERTY MANAGEMENT Proposal, in accordance with all terms and specifications contained herein:

Attach one (1) copy of your proposal package.

Name of Firm: _____

Signature & Title: _____

Address: _____

Phone Number: _____

Email Address: _____

Contractor shall answer to the following questions by circling the appropriate response or completing the blank provided:

Company Profile:

Is your firm? (Please circle one)

- | | | | |
|----|---------------------|-----|----|
| A. | SOLE PROPRIETORSHIP | YES | NO |
| B. | PARTNERSHIP | YES | NO |
| C. | CORPORATION | YES | NO |

List Legal Names of Company:

References: List **at least three** (3) recent or current properties managed by your firm within the last four years and billing numbers and frequency where the **same/similar services**, as stated **herein**, have been **provided**. (Note: lack of three comparable projects will not disqualify proposer.)

OWNER NAME

Contact Person		Title		
Address	P.O. Box	City	State	Zip
Phone Number		Fax Number		

OWNER NAME

Contact Person		Title		
Address	P.O. Box	City	State	Zip
Phone Number		Fax Number		

OWNER NAME

Contact Person		Title		
Address	P.O. Box	City	State	Zip
Phone Number		Fax Number		

PROPOSAL FORMAT GUIDELINES

In order to maintain uniformity with all proposals submitted, it is requested that the Bidder's proposal includes the following information. Proposal content, completeness, clarity and conciseness are essential and will be considered when assessing the proposer's capabilities.

1. Cover – to clearly display the title of the RRP “Property Management Services for the Poet’s Perch”
2. Executive Summary - Provide a cover letter that serves as the executive summary of the proposal limited to no more than two (2) pages. This letter should include the firm’s understanding of the work to be performed. In addition, state why the firm believes it to be the best qualified to perform the services requested. Also, state the Management contact (Name and title of the representative authorized to sign an agreement for the firm) and Project Manager (Name and title of the person responsible for day-to-day management of the project).
3. Overview – Provide general information about the firm including size, scope of practice, years in business, number of employees, and office location. Include the legal name, address, and legal structure of the firm. Description of relevant experience including the location, size, and duration of properties managed and a description of the role of management.
4. Reports – Copies of sample typical monthly/annual reports.
5. Lease Agreement – A copy of a sample lease agreement with all addenda.
6. Approach to Scope of Services - Provide a detailed overview of how your company, if selected, would address all items set forth in the “Scope of Services” section of this RFP. Additional information must be clearly identified. The items must be addressed in the order in which they appear in the “Scope of Services” section.
7. Program team and management – Listing of the staff and management proposed for the Services to be provided. Experience of and resumes of proposed personnel to be assigned.
8. References - Provide the name/names, email addresses, and telephone numbers of person(s) who can be contacted with regard to the services that were provided.
9. Cost Proposal - Provide a monthly property management service fee offered to fulfill the Scope of Services as outlined in “Section 2” of the proposal document.

If there is a specific service that the company provides that has not been called out in the Scope of Service, but will be included as a service in the specified fee; or if there is a service within the scope service that will not be covered by the monthly service fee proposal. Attach additional sheets if needed. Costs shall include any and all incidental expenses related to completing the Scope of Services outlined in this RFP. Proposed fee structure must be broken down by each potential year that the contract may be extended (initial one (1) year term and optional four (4) year extensions).

AWARD CRITERIA

General Provision – The award of contracts shall be at the sole discretion of the City. It is the intent to make an award to one Consultant for all items. The City may accept or reject any or all proposals in whole or in parts and may waive informalities in the process. The contents of the proposal from the selected Consultant will become the basis for a contractual obligation when the award is made.

Professional Services – Award will be made to the most qualified Consultant that is determined to be the most advantageous to the City at a reasonable price.

Selection – Award will be in accordance with the provisions of the City of Pacific Grove Municipal Code. The proposals may be reviewed individually by an ad hoc committee to assist in the selection process. The finalists may be invited to conduct a presentation and/or oral interview in order to further evaluate the Proposer's capability.

Public Information – After the date specified for the opening of the RFP, all materials received relative to general service proposals become public information and are available for inspection. Professional service proposals become public upon award of contract. The City reserves the right to retain all proposals submitted, whether or not the proposal was selected or judged to be responsive.

Rejection of Proposals – This RFP does not commit the City to award any contract. The City reserves the right, at its sole discretion, to reject any or all proposals without penalty, to waive irregularities in any proposal response or in the proposal procedures, and to be the final judge is determining a responsive and responsible bid. The City reserves the right, at its sole discretion, to reject any or all proposals that contain items not specified, items that are incorrect, that does not complete all the items scheduled, or does not respond to items published specifications or scope of services. Proposals received by telephone or facsimile will be considered non-responsive and will be rejected. Proposals offering less than 90 days for acceptance from the published closing date may be considered non-responsive and may be rejected.

**Attachment B
CERTIFICATE OF INSURANCE**

This is to certify that the following endorsement is part of the policy(ies) described below:
 NAMED INSURED (CONTRACTOR) COMPANIES AFFORDING
 COVERAGE

ADDRESS:

- A.
- B.
- C.

COMPANY (A. B. C.)	COVERAGE	POLICY NUMBE R	EXPIRATION DATE	LIMITS		
				B.I.	P.D.	AGGREGATE
	AUTOMOBILE LIABILITY <input type="checkbox"/> GENERAL LIABILITY <input type="checkbox"/> PRODUCTS /COMPLETED <input type="checkbox"/> OPERATIONS <input type="checkbox"/> BLANKET CONTRACTUAL <input type="checkbox"/> CONTRACTOR'S <input type="checkbox"/> PROTECTIVE <input type="checkbox"/> PERSONAL INJURY <input type="checkbox"/> OTHER <input type="checkbox"/> EXCESS LIABILITY <input type="checkbox"/> WORKERS' COMPENSATION <input type="checkbox"/>					

It is hereby understood and agreed that the City of Pacific Grove, its City Council and each member thereof and every officer and employee of the City shall be named as joint and several assureds with respect to claims arising out of the following project:

It is further agreed that the following indemnity agreement between the City of Pacific Grove and the named insured is covered under the policy: CONTRACTOR agrees to indemnify, hold harmless and defend City, its City Council and each member thereof and every officer and employee of City from any and all liability or financial loss resulting from any suits, claims, losses or actions brought against and from all costs and expenses of litigation brought against City, its City Council and each member thereof and any officer or employee of City which results directly or indirectly from the wrongful or negligent actions of CONTRACTOR's officers, employees, agents or others employed by CONTRACTOR while engaged by CONTRACTOR in the (performance of this agreement) construction of this project.

It is further agreed that the inclusion of more than one assured shall not operate to increase the limit of the company's liability and that insurer waives any right on contribution with insurance which may be available to the City of Pacific Grove.

In the event of cancellation or material change in the above coverage, the company will give 30 days' written notice of cancellation or material change to the certificate holder.

Except to certify that the policy(ies) described above have the above endorsement attached, this certificate or verification of insurance is not an insurance policy and does not amend, extend or alter the coverage afforded by the policies listed herein. Notwithstanding any requirement, term, or condition of any contract or other document with respect to which this certificate or verification of insurance may be issued or may pertain, the insurance afforded by the policies described herein is subject to all the terms, exclusions and conditions of such policies.

DATE: _____ BY: _____
Authorized Insurance Representative

AGENCY: _____ TITLE: _____
 _____ ADDRESS: _____