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2015 Request for Proposal Real Estate Services

Date Issued: October 16, 2015 Due Date: November 16, 2015 4:00 p.m.

Contact Information: Heather Thomson, Manager Legislative Services

Email: heathert@turnervalley.ca

Part 1 – General Information

Please read all documentation included in this package carefully prior to submitting a proposal.

Introduction and Background

The Town of Turner Valley invites your firm to submit a proposal to provide real estate services. Town Council has recently declared 211 Dunham Lane N.W. (Lot 7 Block 20 Plan 8110560 and all that portion of the 16 meter street widening that lies to the north of Lot 7 Block 20 Plan 8110560) surplus to the needs of the Town. This is a 2.2 acre partially serviced lot, zoned residential of which the Town would like to sell in the 2016 calendar year. The Town wishes to engage an experienced real estate service provider in an effort to maximize potential profits. Other parcels of Town owned property may also be reviewed and discussed with the proponent.

Term of Engagement

The contract will be in effect for a six (6) month period, commencing at or around the time of awarding to the successful proponent. In addition to the initial contract, the Town reserves the right to extend the contract for a period of up to six (6) additional months (twelve months total).

Prior to the expiration of the original agreement, the Town and the successful service provider will, at the Town's discretion, negotiate the terms of the extension. Should both parties mutually agree to the terms of the extension then the town and the service provider will formalize and execute the contract extension. Should the parties fail to reach agreement before 60 days from the end of the original term, the Town retains the right to not extend the contract.

The Town of Turner Valley reserves the right to cancel the agreement at any time on sixty (60) days written notice.

Approximate Timelines

The approximate proposal, award and implementation timelines are as follows:

Issuance of RFP	October 16, 2015
Close of RFP	November 16 at 4:00 p.m.
Shortlist of Proposals	November 20, 2015
Presentations (if necessary)	November 23 – 27, 2015
Contract Award	December 1, 2015
Commencement of Service Provision	January 1, 2016



Part 2 – Description of Services

Scope of Services

To provide real estate management services to the Town of Turner Valley. This will specifically involve the selling of surplus lands within the Town. The successful proponent may also be engaged to advise the Town regarding other real estate owned by the Town.

It is anticipated that this will include the need to work with the Town to understand its goals and objectives in this area.

The service provider will provide ongoing advice related to real estate management.

Deliverables

The custodian will be responsible for the provision of the following:

- Any and all real estate services that are considered to be industry standard. This includes but is not limited to print advertising, web presence (MLS listing) and signage.
- Accurate and complete reports regarding real estate transactions and development in the region.
- Establishing relationships with the Town's administrative team and providing sound real estate analysis, consulting advice and opinion.

Part 3 – Terms and Conditions (General)

General

An authorized representative of the firm shall sign the proposal.

Electronic copies of the proposals are preferred. If this is not possible, three (3) printed hard-copies of the proposal are required.

Quotations may be withdrawn at any time prior to the closing date by written request to the Legislative Services Manager.

Costs quoted will be in Canadian dollars.

Costs quoted will be firm and unchangeable after the time and date of the bid closure. Pricing will be guaranteed for a period of at least six months.

All prices quoted shall be exclusive of the Goods and Services Tax.



There is no expressed or implied obligation for the Town of Turner Valley to reimburse responding vendors for any expenses incurred in the preparation of proposals or attendance at interviews/presentations in response to this Request for Proposal.

If, by legal requirement, the proponent requires the Town to enter any real estate contractual arrangements, these shall be provided & form part of the proposal. The Town reserves the right to review and alter any contractual arrangement put forth by the successful proponent.

Acceptance of Submissions

Proposals shall be submitted to the Town of Turner Valley Administrative Office, 514 Windsor Avenue N.W., by 4:00 pm Mountain Standard Time (MST) on November 16, 2015. Late submissions will not be accepted.

Unless explicitly stated otherwise, submission of a proposal indicates acceptance by the vendor of the terms and conditions contained in the Request for Proposal.

The Town reserves the right to withdraw, at its discretion and at any time, this Request for Proposal. The Town will not be held liable for any expenses, costs, loss or damage incurred or suffered by any Proponent as a result of such withdrawal.

The Town reserves the right, without prejudice, to reject any or all proposals.

Accuracy, Confidentiality and Release of Information

All information contained in this document with respect to operations, qualities, quantities, values, description of properties, losses, etc., are reasonably and realistically accurate to the best of the Town's knowledge, however, is not guaranteed by the Town. It is each vendor's responsibility to obtain and verify to the best of their ability the information required to respond accurately to this RFP.

All proposals submitted to the Town become the property of the Town in their entirety. Quotations and the information contained within will be held in confidence as much as is reasonably possible and subject to the disclosure provisions contained in the Freedom of Information and Protection of Privacy Act.

Any information or knowledge gained or obtained by the Vendor as a result of this process will be maintained in confidentiality and will not be sold, distributed or in any way used for profit.



Negotiation and Termination of Contract

To a reasonable degree, the Town reserves the right to negotiate the final contract with the successful vendor outside of the defined scope of services indicated in the RFP.

At any time and at the sole discretion of the Town, the Town reserves the right to terminate any and/or all services provided by the successful vendor should the services provided be deemed to be unsatisfactory. In this event, the Town will provide written notice to the vendor of the unsatisfactory condition and if the vendor does not remedy the unsatisfactory condition within 30 days of the date of written notice, the Town will terminate the service on 30 days written notice.

Conflict of Interest

All vendors are required to disclose to the Town any direct or potential conflict of interest in their RFP submission. The disclosure will detail the nature and degree of the direct or potential conflict. The Town reserves the right to reject a proposal and/or to cancel the award of contract if, in the Town's sole opinion, any interest disclosed from any source could give the appearance of a conflict of interest or cause speculation as to the objectivity of the awarding of the contract.

Part 4 – Terms and Conditions (Special), Instructions to Bidders

General

Notwithstanding the information contained in this Proposal Package, it is your sole responsibility to:

- Review and become familiar with this Request for Proposal Package and any associated documents Investigate the operations, facilities and determine work conditions, and potential problems and difficulties
- Determine costs, equipment needs, personnel needs and product requirements.

Prior to the submission of proposals, each vendor shall satisfy themselves that they are fully conversant with the requirements and any other conditions which may affect the execution of the contract.

Account Management

The successful firm will not change or replace its Account Manager for this agreement without written notice to the Town. The Account manager appointed to the Town's account must be fully qualified and experienced to the Town's satisfaction. As the working relationship between the Account Manager and the Town's finance team is of the utmost importance, the broker will replace the Account Manager on the Town's request if necessary.

Vendor Qualifications/Mandatory Requirements

In order to qualify for consideration, real estate firms must meet the following mandatory requirements:

- Commercially licensed to practice in Alberta for the lead account manager
- No conflict of interest with regard to any other work performed by the firm for



the Town.

- Demonstrated experience by both your firm and the proposed team in the provision of real estate management services within Alberta.
- Proof of applicable insurance.

Proposal Submission Content and Format

Your firm's proposal will address the following points in sequence. Each section is to be clearly titled and separated from the other sections. Failure to follow the required content and format may result in the disqualification of your firm's proposal.

Proposals will include the following:

- Proposal Submission Form -a completed and appropriately authorized copy of the attached 'Proposal Submission Form' – see attached document.
- Mandatory Requirements -one page indicating the following:
 - confirmation that your firm is independent of the Town and licensed to practice in the Province of Alberta confirmation that there is no conflict of interest with regards to any other work performed by your firm for the Town of Turner Valley
 - address/location and a brief description of the resources of the local office.
- Corporate Profile, Head Office and Local Office – brief description of your firm's history, size, locations, number of employees and practice make-up (by percentage of total volume).
- Experience and Expertise, Head Office and Local Office – provide a brief explanation detailing your firm's ability to provide the services including a comprehensive list of clients (preferably municipal or public-sector) to which your firm has provided real estate services.
- Proposed Marketing, Services and Fees – provide a summary of services and fees
- Project Team – provide a list of the key members of the team that would be assigned to provide the services, including name, location, qualifications, related experience, role/involvement



All questions and concerns regarding this proposal process or detailed questions regarding the requirements shall be submitted to:

Heather Thomson
P.O. Box 330
514 Windsor Avenue
Turner Valley, AB T0L 2A0
Phone (403) 933-4494
Email: heather@turnervalley.ca

Any and all new information made available prior to the submission deadline will be released to all known vendors.



Proposal Review and Evaluation

The intent of the evaluation process is to select the firm best suited to provide comprehensive investment management services to the Town of Turner Valley.

Proposals will be opened in private immediately following the proposal submission deadline. The final results will not be released until a contract has been awarded by the Town.

Following the initial proposal review and evaluation, the Town may elect to shortlist the highest evaluated vendors and request presentations to a committee of Town staff. Although the Town will endeavor to provide as much advance notice as possible, it is expected that these presentations (if required) will occur during the first week of March 2014 and all firms should be prepared to provide a presentation, which includes the members of your project team, on short notice.

Proposals will be evaluated based on the following criteria:

- 50% - Proposed marketing services and fees
- 40% - Demonstrated Experience and Qualifications of Firm and Team, Past performance
- 10% - Fit/Ability to work with the Town

Following the submission of proposals, the Town reserves the right to contact vendors for the purpose of clarification of proposal content or to seek further related information.

The Town reserves the right to contact any current or previous client, whether referenced or not, to obtain information required regarding the quality of service provision and to use this information in its sole discretion in the evaluation of the submissions.

The Town reserves the right to reject any and all proposals and need not accept the lowest, or any proposal.



Appendix 1

PROPOSAL SUBMISSION FORM

The undersigned agrees that:

- 1 They have reviewed and are familiar with the relevant Request for Proposal documentation and all associated documents.
- 2 They are familiar with the various terms and conditions of the proposal process and that the attached proposal submission is fully compliant with the requirements stated in the Request for Proposal documentation.
- 3 They are fully conversant with the requirements and any other conditions which may affect the execution of the contract; and
- 4 They have the authority to commit their firm to this agreement with the Town of Turner Valley

RFP TITLE: _____

DATE: _____

FIRM NAME: _____

MAILING ADDRESS: _____

PHONE/FAX NUMBERS: _____

NAME OF AUTHORIZED SIGNEE: _____

SIGNATURE _____

In the event that it is necessary for the Town of Turner Valley to contact your firm for clarifications or further information regarding your proposal submission, please provide the full contact information for that person:

NAME _____

POSITION _____

LOCATION _____

PHONE NUMBER _____

CELL NUMBER _____

EMAIL ADDRESS _____