

**North Penn School District  
401 East Hancock Street  
Lansdale, PA 19446  
www.npenn.org**

**REQUEST FOR PROPOSALS (RFP)  
REAL ESTATE BROKERAGE SERVICES**

**1. INTENT & BACKGROUND**

North Penn School District (the “District”) is soliciting proposals from qualified real estate brokerage firms (the “Broker”) to assist the District with the site selection and the lease or acquisition of land for a new Transportation Center. The District desires approximately 8-12 acres of land.

The District is located in the north-central section of Montgomery County, Pennsylvania, and a small portion of the southern central Bucks County, Pennsylvania and is comprised of the municipal subdivisions of the Boroughs of Hatfield, Lansdale, and North Wales and the Townships of Hatfield, Montgomery, Towamencin, and Upper Gwynedd, all located in Montgomery County and a small portion of the Townships of Hilltown and New Britain located in adjacent Bucks County, Pennsylvania.

The District presently owns thirteen elementary schools, three middle schools, one high school, a credit recovery school, a Support Services Center, a Transportation Center, and an Educational Service Center (administration building). Students in grades 9-12 also attend the North Montgomery County Area Vocational Technical School. The District has approximately 12,700 students. Additional information may be obtained by visiting the District’s website at [www.npenn.org](http://www.npenn.org).

The North Penn School District engaged SchraderGroup Architecture to perform a master plan for the North Penn High School located at 1340 S. Valley Forge Road in Lansdale. The master plan has concluded and the final plan includes two options. Option 1 would include performing a grade realignment to move the 9th-grade population (currently housed in the middle schools) to the North Penn High School site. The 9<sup>th</sup> grade would be housed in an addition to the North Penn High School. In an effort to support the additional student body, other areas of the North Penn High School would be expanded including a new athletic facility and the development of a new commons and cafeteria areas. In addition to the additions to the North Penn High School, Option 1 would include all new building systems, increased natural lighting, and 21st-century, flexible learning spaces. The entire building will be renovated to allow for a reimagined educational facility to meet the needs of 21st-century learning.

The North Penn Board of School Directors has decided to have the public decide if Option 1 will be the preferred option through a referendum process. The portion of the project that will be decided by referendum is the 9<sup>th</sup> grade addition. If the public votes “yes” to the referendum, agreeing to build the 9<sup>th</sup> grade addition, the entire Option 1 project will move forward. If the public votes “no” to the referendum, Option 2 will be the recommended option.

Option 2 is a scaled down project that includes renovating the existing building systems and finishes with a small addition.

Option 1 and Option 2 include the relocation of the Transportation Center from the North Penn High School site. This includes the lease or purchase of a property and the construction of a new Transportation Center elsewhere in the North Penn School District.

Information including public presentations, estimates, and more specific information regarding the North Penn High School project can be found at the [Re-Imagine North Penn High School website](https://reimaginephs.my.canva.site/#page-0) <https://reimaginephs.my.canva.site/#page-0>

Preliminary square foot cost estimates are outlined below.

### **North Penn High School Additions and Renovations – Option 1 (Referendum Passes)**

- Total Estimate (Hard & Soft Cost) - \$400.8 million
  - 9<sup>th</sup> Grade Addition (Hard & Soft Cost) - \$94.6 million
    - 9<sup>th</sup> Grade Addition (Hard Cost) - \$75.7 million
    - 9<sup>th</sup> Grade Addition (Soft Cost) - \$18.9 million
  - Existing Building Renovations & Additions (Hard & Soft Cost) - \$288.4 million
    - Existing Building Renovations & Additions (Hard Cost) - \$248.4 million
    - Existing Building Renovations & Additions (Soft Cost) - \$40.0 million
  - Transportation (Property, Hard & Soft Cost) - \$17.8 million
    - Property Acquisition - \$3.0 million
    - Transportation (Hard Cost) - \$11.8 million
    - Transportation (Soft Cost) - \$3.0 million

### **North Penn High School Additions and Renovations – Option 2 (Referendum Fails)**

- Total Estimate (Hard & Soft Cost) - \$236.8 million
  - Existing Building Renovations & Addition (Hard & Soft Cost) - \$219.0 million
    - Existing Building Renovations & Additions (Hard Cost) - \$164.0 million
    - Existing Building Renovations & Additions (Soft Cost) - \$55.0 million
  - Transportation (Property, Hard & Soft Cost) - \$17.8 million
    - Property Acquisition - \$3.0 million
    - Transportation (Hard Cost) - \$11.8 million
    - Transportation (Soft Cost) - \$3.0 million

The District is issuing this RFP for the purpose of selecting the most qualified, competent, and experienced Broker to ensure identification and subsequent lease or purchase of a new site for the Transportation Center. The Broker must demonstrate significant experience and successful outcomes in prior efforts to locate property for a similar purpose.

## **2. QUALIFICATION REQUIREMENTS**

The Broker retained by the District shall meet or exceed the following minimum qualifications:

- 2.1 The Broker retained must be properly licensed to provide real estate brokerage services in the Commonwealth of Pennsylvania.
- 2.2 The Broker must have a minimum of five (5) years prior experience.

2.3 If the Broker is unable to provide service in an area identified in this RFP, state how the Broker would provide consultative service from a secondary source.

### 3. **SCOPE OF SERVICES**

#### 3.1 **Selection and Appointment of Broker**

3.1.a The Broker may be a firm or individual practitioner.

3.1.b Prior to engagement, the prospective Broker will be required to provide documentation of credentials, including:

- expertise in the area for which engaged;
- unique accomplishments/examples of excellence;
- positions of leadership in the field of real estate;
- resumes of individuals expected to provide services to the District;
- a list of prior clients and the primary contact for each client;
- other relevant information; and
- the proposed engagement letter or contract.

3.1.c The primary criteria in selecting the Broker will be the provision of the highest quality and cost-effective services.

3.1.d In determining the provision of the highest quality services, the District will focus on documentation of credentials provided by the Broker. As a result, firms should highlight key issues, strengths, and priorities from their perspective. Further, what information should the District be aware of that it may not know now? Information may include special capabilities, firm strengths, or any other information you feel is important for us to know.

3.1.e In determining the provision of cost-effective services, the District will focus on:

- reasonableness of total fee charged in relation to services rendered and results produced; and
- efforts or procedures to minimize overall costs by providing proactive or preventive services.

3.2 Scope and requested information:

- Describe how you would assist the District with the Transportation Center relocation process;
- Create a strategy, plan, and timeline for a successful lease or site acquisition;
- Develop a strategy, approach, structure, message, and presentation materials for group presentations;
- Describe all commercial projects for which your firm is currently under contract;
- Provide School Board and community presentations as necessary; and
- If the Broker is unable to provide service in an area identified above, state how the firm would provide consultative service from a secondary source. Indicate which elements of work, if any, the firm proposed to perform with sub-Brokers and include a description of the firm's experience and capability in performing such work.

#### 4. **TIMEFRAME**

The Broker will be expected to commence the provision of services on or about September 22, 2023, and the term of the resultant contract will conclude one week after closing on the property. However, the District reserves the right to terminate the engagement at any time, without cause, with thirty (30) days prior notice.

#### 5. **PROPOSALS**

##### **Submission and Deadline**

All proposals must be e-mailed to Steve Skrocki, Chief Financial Officer, at [skrocksb@npenn.org](mailto:skrocksb@npenn.org). Questions regarding this RFP must be directed to Steve Skrocki, Chief Financial Officer, by e-mail at [skrocksb@npenn.org](mailto:skrocksb@npenn.org) by Wednesday, September 6, 2023. Please do not contact anyone else at the District regarding questions about this RFP. All questions and responses will be posted online at [www.npenn.org/bidspec](http://www.npenn.org/bidspec). An addendum will be issued should one be necessary. **Proposals are due no later than Friday, September 8, 2023, at 4:00 pm.** Interviews of selected firms will be conducted on Wednesday, September 13, 2023. The District will not be liable for any cost incurred in the preparation of proposals or attendance at an interview. Board action to accept the successful firm is expected to occur on Thursday, September 21, 2023.

All firms who are furnished a copy of this RFP, but who decide not to offer a Proposal to the District, are asked to submit a negative reply. Specific comments and observations are encouraged.

##### 5.1 **Submittal Letter**

Respondents shall submit a cover letter, addressed to the Chief Financial Officer, signed by an authorized principal or agent of the law firm, which provides an overview of the respondent's offer, as well as the name, title, email, and phone number of the person to whom the District may direct questions concerning

the proposal. The letter should also include a statement by the respondent accepting all terms and conditions contained in this RFP, signed by an officer or other individual with authority to bind the Broker.

## 5.2 **Experience**

Respondents are to provide a summary of the Broker's experience on similar types and sizes of engagements with an emphasis on school districts in the Commonwealth of Pennsylvania. This summary must include your experience in the areas of services described in Section 3, Scope of Services, provide detailed resumes of persons proposed to work directly with the District, provide an organizational chart to illustrate project organization, and indicate the level of responsibility of each person (professional staff only). Resumes are to include educational qualifications and previous work assignments that relate to this RFP.

## 5.3 **References**

Broker must have a minimum of five (5) years experience in all areas specified in the Scope of Services. Pennsylvania school district client references are preferred. The client references must include the name of the organization, address, telephone number, individual contact person, contact person's e-mail address, the dates services were performed, a description of the services provided, and the total spend for the assignment.

## 5.4 **Budget/Fee Proposal**

All respondents are required to complete and submit a detailed itemized fee schedule and expected schedule of payment to perform all services. Explain how is the suggested fee schedule the most cost-effective way to serve the District. Each response may include a schedule of all out-of-pocket disbursements which you anticipate will result in a charge to the District and the rate for each. Note that the District expects that these reimbursable charges will be charged at the Broker's actual cost, without additional mark-up. The District is exempt from payment of excise taxes, transportation, and sales taxes imposed by the Federal Government and/or State of Pennsylvania. Such taxes must not be included. The cost of the proposed services should be formatted in a "not to exceed" amount or percentage.

## 5.5 **Form of Contract**

The District intends to negotiate and enter into a contract with the most responsible Broker whose proposal is determined to be in the best interest of the District. The form of contract for any award made as a result of this proposal will be a District purchase order, referencing this RFP, which shall be considered as part of this contract. The amount will be based on the fees shown in this proposal, as modified if necessary during negotiations. If you will be requiring the District to sign an additional or separate contract, a copy of the proposed contract must be included with the proposal. In the event of a discrepancy between the Broker's proposed contract and this RFP, the terms of this RFP shall govern.

## 6. **EVALUATION AND AWARD**

The following criteria will be used, without limitation and in no particular order of importance, in evaluating proposals and determining the most responsive Broker:

- The Broker’s technical understanding of the scope of services and proposed professional services as evidenced by the proposal submitted;
- Similarity of past projects, including achieving the desired outcome;
- Program of work and overall approach to this project;
- The capacity to perform the work within the timeline contained within this proposal;
- Differentiating factors that sets the Broker apart from others;
- The background and experience of the Broker in providing similar services as well as specific background, education, qualifications and relevant experience of key personnel to be assigned to this contract;
- Location of Broker’s office;
- Proposed fees and costs, although the District is not bound to select the Broker who proposes the lowest fees. The District reserves the right to negotiate fees with the selected Broker;
- Information obtained by the District from Broker’s references or other clients; and
- Best interests of the District

Proposals in response to this RFP will be reviewed against the criteria listed above.

#### 6.1 Selection Procedures

- The District intends to enter into a contract with the most responsible responsive Broker whose proposal is determined to be in the best interest of the District.
- The District reserves the right to reject any or all proposals or part thereof for any reason, to negotiate changes to proposal terms, to waive minor inconsistencies with the RFP, and to negotiate a contract with the successful Broker.
- The District will evaluate all responsive and responsible proposals based on the criteria enumerated in Section 6 as referenced above. The District may afford the Broker the opportunity to clarify proposals for the purpose of assuring a full understanding of their responsiveness to the RFP.
- The District may conduct an interview of the Broker it judges to be the most qualified to perform the services required, based upon the criteria in this RFP. If so, the Broker will be notified in advance of the proposed interview date. Interviews may be conducted on September 13, 2023. Brokers are advised that the District reserves the right to award this contract solely on the basis of the submitted proposals.

#### 6.2 Fees and Other Charges

- Fees and other charges shall be as set forth in any engagement letter or contract approved by the District.

## 7. **GENERAL REQUIREMENTS AND CONDITIONS**

### 7.1 **Insurance**

- Professional Liability Insurance including errors and omissions with a limit of not less than \$1,000,000 per occurrence and \$2,000,000 aggregate. Any changes to the Broker's policy or carrier from year to year will include "Full Prior Acts" coverage.
- Each insurance coverage named above shall provide not less than a 30-day notice of cancellation to the District. All policies shall be on the occurrence form. Any and all exceptions shall be reviewed by the District's Chief Financial Officer.
- Insurance requirements and coverage may be reviewed from time to time during the term of this contract and all extensions and renewals hereof. The Broker agrees to comply with any and all reasonable insurance requirements or modifications made by the District's Chief Financial Officer.
- Cancellation or other termination of insurance policies required by this Agreement without immediate replacement thereof may be considered a default in the terms and conditions of this Agreement. The Broker agrees that such default may be cured by procurement of insurance on behalf of the Broker, at the Broker's expense, at District's option.

### 7.2 **Hold Harmless Agreement**

In addition to its obligation to provide insurance as specified above, the Broker, their agents and assigns shall indemnify and hold harmless the North Penn Board of Education, including but not limited to, its elected officials, its officers, and agents from any and all claims made against the District, including but not limited to, damages, awards, costs and reasonable attorney fees, to the extent any such claim directly and approximately results from the wrongful, willful or negligent performance of services by the Broker during the Broker's performance of its Agreement. The District agrees to give the Broker prompt notice of any such claim and absent a conflict of interest, an opportunity to control the defense thereof.

## 8. **CONFLICT OF INTEREST**

Respondents shall provide a statement that no conflict of interest exists in rendering service to and in representing the District.

## 9. **PRINCIPALS/COLLUSION**

By Submission of a proposal, the Broker does declare that the only person or persons interested in this proposal as principal or principals is/are named therein and that no other person other than therein mentioned has any interest in this proposal or contract to be entered into; that this proposal is made without connection with any

person, company or parties making a proposal, and that it is in all respects fair and in good faith without collusion or fraud.

10. **DISCIPLINARY/LEGAL ACTION**

Broker shall provide a statement that no employee affiliated with the respondent has, within five years from the date of submission, been disciplined by any State or Federal agency.

Broker shall answer the following questions regarding legal proceedings:

- Are there any pending legal actions alleging violations of law in connection with offering Broker or real estate services against the firm, any partner of the firm, or any employee of the firm? If yes, describe each such pending action.
- Have there been any settlements or judgements involving such actions within the past five years? If yes, describe each settlement or judgement, including the nature of the action and the amount of the recovery.
- Are there any pending legal or disciplinary matters involving such actions against the Broker, any partner of the firm, or any employee of the firm by any Federal or state regulatory agency? If yes, describe each such action.
- Provide information about any criminal indictments or convictions against the Broker, its agency, or its employees and are there any material pending action, settlement, or judgement involving a claim of fraud, whether civil or criminal.

11. **AFFIRMATIVE ACTION STATEMENT**

As a condition of doing business with the District, the Broker must comply with all Federal laws, state statutes and executive orders pertaining non-discrimination. All respondents, as part of their submission, must complete and submit the enclosed Affirmative Action Statement.

12. **ALTERNATIVES AND EXCEPTIONS**

Only slight additions or changes would be expected to be negotiated with the Broker in order to resolve any variances between the proposal and the final contract. Broker may submit alternate proposals or take exceptions to this RFP which deviate from the RFP; however, alternates and exceptions shall be clearly identified as such, and shall include a discussion of the purpose and benefits to such alternate/exception, and the District is not bound to accept them if it determines that they are not in the best interest of the District.



13. **ADDITIONAL INFORMATION AND REVISION TO PROPOSALS**

Information may be provided to potential respondents for the purpose of clarification to assure full understanding of, and responsiveness to, the solicitation requirements. Prospective respondents shall be afforded fair and equal treatment with respect to access to additional information and revision of proposals.

**North Penn School District  
401 East Hancock Street  
Lansdale, PA 19446  
www.npenn.org**

TO: All Vendors  
FROM: Chief Financial Officer  
RE: Affirmative Action

The North Penn School District is an Equal Opportunity Employer. The Board of Education has made it a matter of policy that it will not transact business with firms which are not in compliance with all Federal and State Statutes and Executive Orders pertaining to non-discrimination.

In order to have your firm listed on our acceptable vendors list and thereby be eligible for consideration as a source for goods and services, please complete and return the following Statement of Policy to us.

**STATEMENT OF POLICY**

It is the employment policy of \_\_\_\_\_ that there shall be no discrimination against anyone on the grounds of race, creed, national origin, sex or age in the hiring, upgrading, demotions, recruitment, termination and selections for training.

In addition, this firm is in full compliance with the letter and intent of the various Equal Employment Opportunities and Civil Rights Statutes noted above.

Date	Signed (Name/Title of Company Officer)
Telephone	Street Address
	City/State/Zip Code