



Opportunities For Learning

Public Charter Schools

320 North Halstead Street
Pasadena, California 91107
(626) 921-8200
www.emsofl.com

Property Management

REQUEST FOR PROPOSAL

Dr. Richard Rundhaug
Opportunities for Learning
schan@emsofl.com
(626) 921-8246

Table of Contents

INTRODUCTION

- Company Background & Objective
- Learning Center Locations

REQUEST FOR PROPOSAL

- Purpose
- Objective
- Scope of Service
- Calendar of Events
- Limitation of Liability

RFP RESPONSES

- Notice of Intent to Bid
- Formal Bid Proposal Submission

RFP FORMAT

ATTACHMENTS

- Attachment A: Scope of Service Detail
- Attachment B: Pricing Matrix

Introduction

Company Background & Objective

Opportunities for Learning (OFL) is a FREE public charter school, serving students grades 7-12 who have fallen behind in school, are looking to get ahead and graduate early, or simply crave a non-traditional learning environment.

OFL was established in 1999 by a family genuinely and profoundly interested in the well-being of California young people. They saw potential that struggling students couldn't see in themselves. For over 16 years, OFL and its founders have helped more than 140,000 students find their passion and equip themselves with the knowledge to pursue their dreams.

At OFL, inspiring students inspires us. We believe the student-teacher relationship is critical to a young person's social, emotional, and academic success. When you visit our locations, you'll find students working one-on-one with highly qualified, passionate teachers and advisors. We take endless pride in the quality of our staff and the deep connection that each of them share with every OFL student.

Today, OFL offers different methods of instruction, creating what we call a 'blended' learning model. This innovative approach to education allows students to learn with great flexibility through:

- Independent study
- Small group (SGI) classes
- Online courses
- One-on-one, single-subject tutoring
- Hands-on, experiential activities, trips, and cultural excursions

For many students, OFL has been a beacon of hope after years of academic struggle, and we're eternally grateful to have been a part of their success.

Learning Center Locations

Pasadena Corporate Office | 320 N. Halstead Street, Pasadena, CA 91107

OFL Baldwin Park Charter

- *Arleta* | 9700 Woodman Ave, A-23, Arleta CA 91331
- *Bellflower* | 10058-64 Rosecrans Blvd, Bellflower CA 90706
- *Bixby* | 3501 Atlantic Ave, Long Beach CA 90807
- *Encino* | 17953 Ventura Blvd, Encino CA 91316
- *Oxnard* | 1731 E Ventura Blvd, Oxnard CA 93036
- *Ramona* | 12731 Ramona Blvd, 201-203, Baldwin Park CA 91706
- *Reseda* | 8911 Reseda Blvd, Northridge CA 91324
- *Wilson* | 3842 3844 3850 E Anaheim St, Long Beach CA 90804

OFL Baldwin Park II Charter

- *Chatsworth* | 20553 Devonshire St, Chatsworth CA 91311
- *Compton* | 1301 E Rosecrans Ave, 105, Compton CA 90221
- *Cudahy* | 7995 S Atlantic Ave, Cudahy CA 90201
- *East LA* | 5301 Whittier Blvd, J, Los Angeles CA 90022
- *Hawthorne* | 13613 Hawthorne Blvd, Hawthorne CA 90250
- *Huntington Park* | 5949 S State Street, Huntington Park CA 90255
- *Long Beach/Jordan* | 6604 Cherry Ave, Long Beach CA 90805
- *Simi Valley* | 2585 Cochran St, H, Simi Valley CA 93065
- *Signal Hill/Willow* | 400 E Willow St, Long Beach CA 90806
- *Studio City* | 12029 Ventura Blvd, Studio City CA 91604
- *Vermont* | 8219 S Vermont Ave, Los Angeles CA 90044
- *Watts* | 638 E El Segundo Blvd, Los Angeles CA 90059
- *West Covina* | 711 N Azusa Ave, West Covina CA 91791

OFL Fresno Charter

- *Fresno* | 1603 East E St, Fresno CA 93706

OFL Duarte Charter

- *City of Industry* | 16030 Amar Rd, City of Industry CA 91744
- *Duarte/Monrovia* | 806 E Huntington Dr, Monrovia CA 91016
- *Pasadena* | 3130 E Colorado Blvd, Pasadena CA 91107

OFL Capistrano Charter

- *Dana Point* | 33621 Del Obispo, E, Dana Point CA 92629

OFL Santa Clarita Charter

- *Canyon Country* | 18824-18830 Soledad Canyon Rd, Canyon Country CA 91351
- *Lancaster 1* | 1160 Commerce Center Dr, Lancaster CA 93534
- *Lancaster 2* | 2701 West Ave, L, Lancaster CA 93536
- *Palmdale 1* | 2140 E Palmdale Blvd, C-J, Palmdale CA 93550
- *Palmdale 2* | 533 E Palmdale Blvd, H, Palmdale CA 93550
- *Ridgecrest* | 900 N Norma St, Ridgecrest CA 93555
- *Santa Clarita* | 27010 Newhall Ranch Rd, A10-15, 25, Santa Clarita CA 91355

Request for Proposal

Purpose

OFL is requesting proposals from Property Management Companies (“Vendors”) who handle both brokerage services and property management services in order to develop a three to five year agreement with a single property management company.

Objective

OFL is looking for a comprehensive solution for brokerage and property management for a more strategic, holistic, cost-efficient and consistent approach to manage its lease administration and facilities management needs. Due to the increasing number and numerous relocations of learning centers, OFL no longer has the capacity or expertise to effectively manage its various learning centers. OFL is looking to hire a Vendor to manage all brokerage and property management services for a three to five year period.

OFL centers are located in Santa Clarita, Los Angeles, Orange and Fresno counties. The Vendor must be willing to travel to all regions to service and support the various learning center locations.

Scope of Service

All responses should be structured to address how the organization will meet the following objectives and scope:

OFL is looking for a Vendor to provide a comprehensive property management services for all of its learning centers. Brokerage services include but are not limited to:

- Market analysis/study
- Recommendations of locations for leasing
- Negotiation and execution of leases

Property management services include but are not limited to:

- Lease administration and audit
- Location planning and research
- Financial analysis and budgeting
- Communication with landlords

Property management also includes coordination with outside vendors for the following:

- On-demand maintenance at every center
- Furniture (ordering and moving)
- Cleaning
- Decals
- Window wraps and tints
- Signage
- Anti-graffiti
- Flooring
- Paint
- Pest Control
- Shades
- Plumbing
- Roof
- Locksmith
- Landscaping
- Security
- Electrical
- HVAC

For more detail regarding the scope of services, please see Attachment A.

Calendar of Events

The following calendar of events is our best guess as to the timeline and milestones for the appropriate actions and decisions. OFL reserves the right to alter or modify this calendar without cause or notice.

Distribution of RFP	Tuesday, May 23, 2017
Confirmation of Intent to Bid email	Friday, May 26, 2017
Question Deadline	Monday, May 29, 2017
Completed RFP submission	Wednesday, May 31, 2017
Identification of 3 to 4 final vendors	Friday, June 2, 2017
Written recommendation submitted to Board	Tuesday, June 6, 2017
Board Presentations and Vendor Selection	Late June 2017

Limitation of Liability

OFL shall not be liable or responsible for any and all expenses incurred by any vendor in response to this RFP. This RFP does not constitute a billable engagement or a valid contract. This RFP shall be solely an invitation to participate in this evaluation of Property Management for OFL Learning Centers. Each OFL Charter School reserves the right to reject any and all proposals without liability.

RFP Responses

OFL's objective in receiving a response to this RFP from each Vendor is to evaluate the compatibility between OFL and the Vendor. OFL will evaluate each response it receives based on criteria it finds important and relevant to the request. Those criteria could range from cost, overall comprehensive solution, experience, key personnel, technical approach, efficacy, efficiency, or any other criteria the review staff deems important. OFL will be placing significant emphasis upon the proposal response format and content as well as the total cost summary.

Please use this as your overview and roadmap through the RFP process.

Notice of Intent to Bid

If there is an intent to bid after reviewing the RFP, please notify OFL's Superintendent Dr. Richard Rundhaug via email to formally notifying OFL of your intention to bid. The intent to bid must be received no later than 5:00pm (PST) on Friday, May 26, 2017.

Formal Bid Proposal Submittal

All proposals must be submitted no later than 5:00pm (PST) on Wednesday, May 31, 2017 to the office of Dr. Richard Rundhaug. Electronic copies must be sent via email to schan@emsofl.com. Hard copies can be mailed to:

Attn: Richard Rundhaug
320 N. Halstead St., Ste 220
Pasadena, California 91107

If additional information is needed, please submit all inquiries via email to Dr. Richard Rundhaug at schan@emsofl.com. Please include the subject line of "OFL Property Management RFP". All questions will be compiled and answers to all questions will be sent out to all bidders. All materials provided to OFL become the property of OFL and may be returned at its sole discretion. OFL reserves the right to disqualify or reject any proposal that does not completely fulfill the submission requirements. Acceptance of any proposal will be at OFL's sole discretion, with or without cause. Furthermore, OFL reserves the right to negotiate all terms, conditions and compensation under this RFP.

The contract, if any, shall be awarded to the Vendor whose proposal is most advantageous to OFL. OFL may at its sole discretion select the response that best fits its needs and may choose to cancel the RFP.

RFP Format

Vendors must submit formal bid proposals in strict conformance with the format, headings and procedure as stated below:

1.1 Overall Goals and Objectives	Provides a chance for the vendor to acknowledge OFL's goals and objectives of the RFP
1.2 Background	Provides a summary of the vendor's background
1.3 Terms and Conditions	Provides a high-level summary of the proposed terms and conditions for executing a contract (May include a copy of a proposed three to five year contract for consideration)
2.1 Pricing	Provides pricing per service or lease (Please use Attachment B for submittal if desired)
3.1 Vendor Capabilities	Provides a discussion of the vendor's capabilities and indicates intention to sub-contract for various services
3.2 Delivery of Products and Services as Contracted	Vendor describes how it will fulfill the requirements as stated in the RFP
3.3 Industry Experience	Vendor describes its experience with similar customer requirements and provides examples if possible
4.1 Project Team	Vendor provides names and biographies about the project team members
4.2 Management Personnel	Vendor provides names and biographies about project leadership, as well as company leadership
4.3 Cultural Compatibility	Vendor states how it will accommodate to customer cultural issues, such as dress codes and working hours
4.4 Special Requirements	Vendor provides any additional information regarding special situations such as emergencies or if a situation arises that is outside of the scope of the contract.

Attachment A

Detailed information regarding Scope of Service

LEASE ADMINISTRATION & AUDIT | This would include the procurement of long-term (3-5 years) and short-term (5 months) leases as well as open communication with landlords to negotiate terms beneficial to OFL. Long-term leases would be needed for new learning centers or relocation of existing learning centers. Short-term leases would be needed for temporary summer school locations. The creation and maintenance of an organized lease database to track rent, rent increases and abatement, tenant improvement allotment, etc. This database is extremely important as there is an external audit conducted at the end of every fiscal year. To ensure that all information is true and accurate, the Vendor must be able to conduct an internal audit to provide to OFL prior to the external audit.

LOCATION PLANNING & RESEARCH | OFL mainly serves an at-risk demographic. Therefore, market studies and obtaining community information must be done prior to the signing of a lease in order to ensure that the center will effectively be able to serve its target population. Generally centers are 4,000-7,000 square feet and are located in shopping centers and strip malls that are easily accessed via public transportation. In addition to market studies, the Vendor must verify that the proposed center location is within the boundaries of the Charter's authorizing district. After successful execution of a lease, the Vendor is expected to prepare the property for use as a learning center. This includes coordinating and collaborating with the contracted construction company and landlords for any design build that needs to occur as well as ordering furniture and making sure everything is up to code. It is imperative that the Vendor plans, schedules and coordinates the opening and closing of all centers. Vendor will be responsible for working with the contracted construction company to ensure timeline adherence. Vendor will be expected to obtain all necessary documents for operation which include but are not limited to CUPs, Business Licenses, and fire inspection certificates.

FINANCIAL ANALYSIS & BUDGETING | Each charter is given a specific budget for operating expenses. This aspect also applies to the Property Management facet of the services needed. The Vendor must be able to look at the charter as a whole to effectively budget and make assumptions for that charter. It will be the Vendor's duty to keep a detailed record of all services rendered and costs associated with those services. Vendor will be expected to give bi-weekly updates to OFL on to-date spending. If a service or purchase outside of the scope of the contract arises, the Vendor must request approval from OFL prior to purchasing.

Attachment B

Please provide approximate costs for the services listed and indicate if the cost is a flat fee or hourly charge. Feel free to add additional services you feel we may have missed.

Property Management Services			
*Please indicate whether your company can provide these services with a "yes" or "no" and state the fees associated for each item			
Brokerage Services	Service Provided?	Fee Type % or \$	Fee
Evaluate Property			
Property Budget Projection			
Property Checklist for Client			
Determine Market Rate for Property			
Negotiate Contracts			
Final Acceptance Walkthrough			
Monitor contract vendors like landscapers and custodial services			
Inspect and Maintain building elements			
Communication			
Handling Complaints/Emergencies			
Maintain Relationships- including fee retrieval, documentation of incidents, assigning responsibility for maintenance tasks			
Point of contract for school emergencies			
Record Keeping			
Maintain Paperwork			
File and Maintain Business License			
Inspections			
Alarm Permits			
Maintain Building Permits			
Fiscal Management			
Ensure bills are paid			
Ensure tax forms are completed and paid			
Advice and Consultation			
Information on Landlord-Tenant Law			
Lease Administration			
Track All Lease Information for All Centers			
Tracking Critical Dates			
Communication with Landlords			

Lease Auditing			
Property Management			
Facilities Management			
Coordination with Outside Vendors			

Please indicate pricing of any additional services Vendor provides that are not listed in scope, if any.

Service	Price