

THE UNIVERSITY OF RHODE ISLAND

Solicitation Information

4/2/2024

RFI# 101353

TITLE: Preferred Real Estate Services

Submission Deadline: 4/30/24 at 1:00 pm (Eastern Time)

PRE-BID/ PROPOSAL CONFERENCE: NO
MANDATORY: NO

If YES, any Vendor who intends to submit a bid proposal in response to this solicitation must have its designated representative attend the mandatory Pre-Bid/ Proposal Conference. The representative must register at the Pre-Bid/ Proposal Conference and disclose the identity of the vendor whom he/she represents.

DATE:

LOCATION:

Questions concerning this solicitation must be received by the URI Purchasing Department at URIPurchasing@uri.edu no later than 4/12/24 at 12:00 pm (EST). Questions should be submitted in a *Microsoft Word attachment*. Please reference the RFP# on all correspondence. Questions received, if any, will be posted on the Division of Purchases' website (<https://purchasing.ri.gov/bidding/externalbidsearch.aspx>) as an addendum to this solicitation. It is the responsibility of all interested parties to download this information.

BID SURETY BOND REQUIRED: NO

PAYMENT AND PERFORMANCE BOND REQUIRED: NO

Kristen Bellotti, Assistant University Purchasing Agent

Respondent Information:

Company Name _____

Address _____

Contact Name _____

Contact Email _____ :

Contact Phone _____

SECTION 1: INTRODUCTION

The University of Rhode Island Board of Trustees /University of Rhode Island is soliciting Informational responses from qualified OFFERORS to offer Real Estate Services for new and prospective employees who may be relocating to Rhode Island. This request is being made in accordance with the terms of this Request for Information (“RFI”) and General Terms and Conditions of Purchase which may be obtained at: <https://web.uri.edu/strategic-procurement/purchasing/>

This is a Request for Information (“RFI”), not a Request for Proposals. Responses will be evaluated in accordance with the solicitation. There shall be no public opening and reading of responses received by the University of Rhode Island pursuant to this solicitation, other than to name those vendors who have submitted responses.

SECTION 1. INSTRUCTIONS AND NOTIFICATIONS TO VENDORS:

1.Potential vendors are advised to review all sections of this RFI solicitation carefully and to follow instructions completely, as failure to make a complete submission as described elsewhere herein may result in rejection of the response.

2.The University invites comments, suggestions and recommendations from potential vendors and other interested parties on any questions or issues raised in this RFI solicitation. Vendors are not required to answer all questions.

3.Alternative approaches and/or methodologies to accomplish the desired or intended results of this RFI solicitation are solicited.

4.This is a request for information only, not a request for proposals or price quotes. Therefore, no award shall be made as a result of this solicitation. RFI responses will be reviewed, and for procedural purposes, RFI's will be cancelled following the closing date.

5.All costs associated with developing or submitting a proposal in response to this RFI solicitation or for providing oral or written clarification of its content, shall be borne by the vendor. The University of Rhode Island assumes no responsibility for any vendor costs even if the RFI is cancelled or postponed.

6.Any and all information submitted to the University for consideration in response to this RFI solicitation shall not be considered to be public records as defined in Title 38, Chapter 2 of the General Laws of Rhode Island unless and until there is a contract award through a subsequent, related procurement.

7.Vendors are responsible for monitoring the RI Division of Purchases website on a regular basis, as additional information relating to this RFI solicitation may be released in the form of addenda, as necessary.

Restrictions on Communications – No Bidder-initiated contact, other than normal business activities not associated with this procurement, will be allowed after the issuance of this RFI between Bidders and University employees or their agents regarding this solicitation, except with express permission of the University Purchasing Department. Any such other contact may be considered improper and may disqualify a Bidder from further consideration. The appropriate

channel to direct any communications, concerns or questions regarding the RFI is through the email address provided herein.

SECTION 2: MISSION, BACKGROUND & SCOPE

URI Mission

The University of Rhode Island is the state's flagship land and sea-grant research institution, with a commitment to urban initiatives. A student-centered research institution, URI actively partners with other organizations globally and locally to advance knowledge and to develop informed residents and leaders. URI is committed to high-quality education, community engagement, and solving the world's most important challenges. Situated on the traditional land and territories of the Narragansett Nation and the Niantic People, URI strives to create a diverse and inclusive environment for researchers, teachers, learners, and community members.

Foundational Values

- Freedom to learn, teach, create, and conduct research with integrity in the pursuit and dissemination of new knowledge aimed at contributing to the public good.
- An inclusive, accessible, equitable and diverse community whereby we respect the rights and dignity of all.
- Intellectual curiosity, lifelong learning, leadership, and scholarship in creating a thriving URI community in service to Rhode Island and the world.
- Sustainability and care of our environment conducive to the physical and mental health of our community.
- Self- and institutional reflection of our values in our work, scholarship and interactions, holding ourselves, each other, and the institution accountable to uphold them to a high standard.

Background

A housing search is a time-consuming task associated with a national/global employee search, and eventually the relocation to a new job and a new community. This is a dynamic and often overwhelming task for individuals who are finishing employment in one area and moving to a new area with or without family members. The University aims to be an employer of choice and attract and retain talent. To do that, it wants to offer quality real estate services to its new employees and their families. This would provide for a personalized introduction to the Rhode Island area, allowing for a positive and enjoyable experience.

Scope: Overview and Goal

The University of Rhode Island seeks to offer customized real estate services to new faculty and staff who will have a significant transition to Rhode Island.

The University wants to offer concierge real estate services to enhance and support its faculty and staff recruiting and retention efforts. URI understands that a smooth transition, which includes the introduction and integration into a new community and surrounding area, is essential for the success of new employees. Offering a customized real estate program will focus on the relocation needs of new employees from the beginning of the search to the closing of a purchase or signing of a lease agreement, ensuring a successful experience.

For the University:

- An established relationship with the Point of Contact (POC)
 - The POC will connect the employee with the real estate professional for an introduction and Welcome Packet.
- A Welcome Packet to include information on the real estate professional/organization and include information such as maps, pamphlets, and a buyer's guide or renter's guide for the Rhode Island area.
 - The Welcome Packet will share the purpose of the service provided, information and history of neighboring towns and communities, and significant points of interest (local services, recreation and activities, dining and entertainment, elementary and secondary schools, hospitals, and medical facilities), as well as the process for moving forward with a purchase contract ~ all the requirements and steps.
- Direct communication with the employee.

For the Employee:

- A scheduled one-on-one consultation focused on lifestyle priorities to customize a tour of available housing,
- A scheduled tour of the local communities, services, and amenities,
- A scheduled tour of customized properties and potential alternative options,
- Assistance with the search from contract through the purchase or leasing agreement of real estate, and
- A personalized referral if an out-of-state home needs to be sold (if desired).

SECTION 3: QUESTIONS

Questions concerning this solicitation must be e-mailed to the URI Purchasing Department no later than the date and time indicated on page one of this solicitation. No other contact with University parties is permitted. Please reference the RFI# on all correspondence. Questions should be submitted in writing in a Microsoft Word attachment in a narrative format with no tables. Answers to questions received, if any, shall be posted on the Division of Purchases' website as an addendum to this solicitation. It is the responsibility of all interested parties to monitor the Division of Purchases website for any procurement related postings such as addenda. If technical assistance is required, call the Help Desk at (401) 874-2171.

SECTION 4: RESPONSE CONTENTS

Vendors and other interested parties should answer the following questions for their RFI response. The following outline is intended to standardize and structure responses for ease of analysis. Vendors should follow the format below and identify the Section and the question numbers for which they are responding, restating the RFI question above the response.

Please respond to the questions below as part of your submission.

Do NOT include a cost proposal with the RFI response, as cost will not be considered.

Qualifications and Requirements:

- Licensed and insured realtor/real estate organization
- Resume outlining your skills and a portfolio of your accomplishments
- Experience in tourism, hospitality management, and/or guest services
- Exceptional knowledge of the Rhode Island area
- Exceptional communication and customer service skills

Question 1: Are you a licensed and insured realtor/real estate organization?

Please provide a copy of the license with the license number and proof of insurance.

Question 2: Do you have a relationship with the University of Rhode Island?

If so, please explain.

Question 3: Do you have experience in tourism, hospitality management, and/or guest services?

If so, please elaborate on your experience.

Question 4: Do you have exceptional knowledge of the Rhode Island area, including neighborhood amenities such as public and private education entities, childcare services, sports and recreational facilities and opportunities, hospital and medical providers, financial institutions, retail businesses, churches, and other religious establishments?

If so, please identify the Rhode Island communities in which you have this knowledge, including those that may extend throughout Southern New England.

Question 5: Do you have exceptional communication and customer service skills?

If so, please share an example of your communication style and skilled services.

This RFI requires a sample Welcome Packet that would serve as part of an introduction to Rhode Island and its neighborhoods to prospective employees as part of the recruiting and retention efforts of the University.

Qualified respondents to this RFI are asked to submit the following:

- A proposed Welcome Packet offering preferred real estate services that are designed for the University's recruiting and retention needs. For example, the University is looking for the engagement of a local preferred real estate service to work with prospective and new employees from the point of introduction through the closing of a purchase or lease. This Welcome Packet will be provided at the time of introduction.

A Welcome Packet should include:

- Information on the real estate professional/organization, maps, pamphlets, and a buyer's guide or a renter's guide for the Rhode Island area and the purpose of the service provided,
- Information on neighboring towns and communities, including significant points of interest, local services, recreation and activities, dining and entertainment, elementary and secondary schools, hospitals, medical facilities, and
- The process for moving forward and closing a purchase or lease contract. For example:
 - a one-on-one consultation focused on lifestyle priorities to customize a tour of available housing,
 - a tour of the local communities, services, and amenities,
 - a tour of customized properties and potential alternative options,
 - assistance with the search from contract through the purchase or leasing agreement of real estate, and
 - a personalized referral if an out-of-state home needs to be sold.

Additional Information:

The University will review proposals and select *Preferred Real Estate Service Providers* based on the above qualifications and requirements, and the proposed concierge services as outlined above in the Welcome Packet. The selection of realtors for these services will be available on the University's Human Resources website and be available to all prospective employees. There is no commitment on the part of the University for business generated as a result of this RFI and selection of qualified firms. The University may elect to reevaluate the selection of qualified firms on an as-needed basis and update the information advertised as a result.

Applicants may be asked to meet with the University to clarify statements in their responses.

RESPONSE CONTENTS

A. Responses shall include the following:

1. One Written Copy Response - describing the requirements and concept for this potential project, and all information described earlier in this solicitation.
2. One Digital Copy Response – on CDR or USB

B. Formatting of proposal response contents shall be as follows:

1. Formatting of Files – All files submitted must be labeled with:
 1. Vendor's name
 2. RFI #

2. Formatting of written documents:

1. For clarity, response documents shall be type-written. All documents shall be formatted to single-space, with 1" margins on 8.5"x 11" paper setting using a font of 12-point Times New Roman.
2. All pages of the response are to be sequentially numbered in the footer, starting with number 1 on the first page of the narrative (this does not include the cover page or table of contents) through to the end, including all forms and attachments. The vendor's name should appear on every page, including attachments. Each

attachment should be referenced appropriately within the response section and the attachment title should reference the response section it is applicable to.

C. All responses must include the following vendor information:

- Company Name
- Company Street Address, including City, State, and Zip Code
- Contact Name
- Contact Email and Phone number

SECTION 5 RESPONSE SUBMISSION:

All responses must be physically received in a sealed envelope at the University of RI Purchasing Department.

Interested vendors must submit responses to provide information covered by this RFI on or before the date and time listed on the cover page of this solicitation. Responses received after this date and time, as registered by the official time clock in the reception area of the University of RI Purchasing Department.

MAIL TO:

UNIVERSITY OF RHODE ISLAND
PO BOX 1773
PURCHASING DEPARTMENT
KINGSTON, RI 02881

COURIER:

UNIVERSITY OF RHODE ISLAND
PURCHASING DEPARTMENT
10 TOOTELL RD.
KINGSTON, RI 02881-2010

NOTE: Proposals received after the above-referenced due date and time will not be considered. Proposals misdirected to other University locations, or which are otherwise not present in the URI Purchasing Department by the scheduled due date and time will be determined to be late and will not be considered. Proposals faxed, or emailed, to the URI Purchasing Department will not be considered. The “official” time clock is located in the reception area of the URI Purchasing Department. **(Please be advised that FedEx/UPS do not always arrive by 10:30 am, you would be smart to send your submission to arrive at least one day early)**

SECTION 6: CONCLUDING STATEMENTS

This Request for Information is solely for information and planning purposes and does not constitute a request for proposal or an invitation to bid. All information received in response to the RFI and marked as “Proprietary” shall be deemed to be confidential but may still be subject to disclosure pursuant to the Rhode Island “Access to Public Records Act (APRA), R. I. Gen. Laws § 38-2-1, et seq. Responses to the RFI will not be returned. Any APRA requests will be reviewed with the responding vendor before disclosure of any documents.