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 RFQ – Real Estate Advisory Services

Questions & Answers
May 27, 2015

1. The RFP states the winner will be an advisor and not an agent or broker for the ultimate transaction of
any property. Does this mean whoever wins this advisory contract cannot also win a future contract for
brokerage services?

 The selected firm/individual cannot benefit financially from any subsequent transaction;
therefore, the selected firm/individual cannot be the broker on any transaction that they have
provided “advisory services” for. The firm/individual will be paid an agreed upon “fee” for
assistance with any transaction identified by the Board of Education. The firm/individual will
not receive a “commission” on property sold, bought, etc.

2. If the answer to the first question is yes, is a subsidiary corporation of the advisor allowed to perform the
brokerage services for the property?

 Please see answer #1 above

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broker/agent?

 Please see answer #1 above

4. Why is the advisor role designed to be separate and apart from the ultimate broker/agent?

The advisory role is designed to be separate and apart from the broker role to promote
transparency of the process and to avoid any appearance of a conflict of interest.

5. If selected, what is the anticipated duration of the engagement for the services outlined in the RFP/RFQ?

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6. Has SCUSD sold or leased any other facilities in the last 5 years, and if so, was an advisor used for those
transactions?

 There has not been a real estate advisory firm utilized in the last five years besides in-house legal
counsel.

7. Is there a specific number of properties (disposition and/or acquisition transactions) that the District
anticipates the selected consultant be involved with for the District during the initial year of the subject
contract for real estate advisory services.

 There is not a specific number of properties identified at this time. However, SCUSD currently
has approximately seven to ten surplus properties.

Proposals are due no later than 4:30 p.m., June 9, 2015