

**OFFICIAL NOTICE #57987
REQUEST FOR QUALIFICATIONS
REAL ESTATE BROKER SERVICES ON BEHALF OF THE
DEPARTMENT OF CITY DEVELOPMENT**

The Department of City Development of the City of Milwaukee is seeking the services of qualified Real Estate Brokers to serve as listing agents for City-owned properties

The RFQ can be found on DCD's web site at the following link:

city.milwaukee.gov/DCD/RFPs

Questions regarding this Request for Qualifications (RFQ) should be addressed to Celeste Jantz in writing via email at: cejantz@milwaukee.gov. Deadline for questions regarding the RFQ are due by **October 17, 2023**. Any additional information and/or clarification(s) regarding this RFQ will be posted in the form of an addendum by **October 19, 2023**. It is the responsibility of the Proposer, prior to submitting a proposal, to determine whether all addendums have been received and are included in the RFQ response.

Proposals are due October 26, 2023, by 11:00 a.m. CDT

*****VIA E-MAIL – to DCDPurchasing@milwaukee.gov*****
(additional info in the RFP document)

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**Department of City Development
809 N. Broadway
Milwaukee, Wisconsin 53202**

September 15, 2023

I. Introduction

The Department of City Development (DCD) is seeking the services of licensed and qualified Real Estate Brokers to list City-owned, tax-foreclosed residential properties for sale. The City reserves the right to award up to a maximum of ten Residential Listing Contracts (RLCs) that will begin December 15, 2023 and go through to December 14, 2026. The actual number of RLCs awarded will be determined by the City after reviewing all submittals and determining how many are needed to best meet the needs of the City.

The City's expectations are described herein.

II. Scope of Services

- A. City will select up to a maximum of ten licensed real estate brokers to list City properties for sale. City staff will select the properties to be listed by each broker.
- B. There is no defined minimum or maximum number of properties that will be listed by each broker. Listings will be assigned by City staff in a way that best meets the needs of the City (i.e. turnaround time for sale of properties, responsiveness to DCD staff, etc.)
- C. The City will prepare a scope of required repairs for each property. For 30-days prior to a property being referred for a Broker listing under an RLC, properties will be listed by the City of Milwaukee for owner occupants and eligible buyers under the 500+ program (see Milwaukee.gov/500). City staff will handle the marketing during the first 30 days. Referrals to Brokers under RLCs for listing may include restrictions on who properties may be sold to, such as owner occupants or other restrictions. Those restrictions may expire at some point during the listing, which may vary from property to property. During the listing period, the City may request the property be discontinued from marketing.
- D. Listing brokers will be required to monitor the properties every two (2) weeks and submit condition reports to DCD staff. Monitoring is to include, but not be limited to, walking around the exterior of each property and reporting conditions. Broker partners must enter the inside of the property every other inspection and report changes in condition. When a listing broker reports the need for repairs or maintenance work, City staff will arrange the work using City contractors.
- E. Commission: Broker's commission shall be the **greater of \$2,000 or 6%** of the accepted purchase price; unless the Buyer is buying the property as part of a City DCD reduced-price program, for a purchase price of \$1 or \$3,000, in which case the Broker's commission shall be **\$500** and the Offer shall provide that the commission be paid by the Buyer.
- F. Listing brokers will be responsible for the following marketing activities:
 1. Write and post an MLS listing, including interior photos in the listing
 2. List City properties on their company web site
 3. Post a company for-sale sign at the property and remove upon disposition of the property
 4. Upon City's request, open properties for inspection during special events such as a home-buyers fair.
 5. Upon City's request, schedule and open properties for Home Inspectors or Appraisers
 6. Propose reduced or alternative pricing if appropriate
 7. Notify City of aged inventory that needs to be reviewed for possible alternate dispositions (demolition or other) by the City
 8. Return lockbox/padlocks to City or the City's title company at closing
 9. Remove all City signs from property after closing

- G. City will use its standard procedures to vet buyers on offers submitted by listing brokers, including referring to the buyer policies in MCO 304-49 and other established criteria.
- H. Brokers will be required to sign a conflict of interest statement.
- I. Participating brokers will be asked to meet as a group with City staff periodically to share observations and recommendations about improving City property disposition practices.
- J. During the performance of all the services in any contract awarded as a result of this RFQ the Real Estate Broker shall ensure compliance with all recommendations and Orders from the City of Milwaukee's Health Department pertaining to COVID-19 or other public health emergencies.

III. Project Requirements

A. Time Frame and Contract Format - Services for this project will begin as soon as Residential Listing contracts with selected Real Estate Brokers can be executed and no sooner than December 15, 2023. Work will be on an as needed, as requested basis. A Residential Listing Contract will be entered into between the City and the selected Real Estate Broker (or Brokers) based upon the scope of work defined. DCD reserves the right to negotiate the terms, conditions, and price with the most responsive proposals. The term of the Contract will be three (3) years.

B. Coordination - A staff member from DCD will coordinate the project. For the purpose of efficiency, DCD requires that the assigned Real Estate Brokers be accessible to DCD on a regular and as needed basis. The Real Estate Brokers and DCD will establish a regular communication format through which DCD can be kept abreast of the progress of items in the scope of services

C. Products - The Real Estate Brokers shall provide services and deliverables as noted under the Scope of Services. All results (including work in progress) from this contract will remain the property of DCD. DCD will have access to all other working papers or information stored on a computer or computer disk of the Real Estate Broker (s) concerning this contract; the Real Estate Broker (s) should check with the DCD prior to destroying any working papers or information stored on a computer or computer disk.

D. Insurance – See Attachment A

E. Qualified Brokers and Assigned Listing Agents, as well as any LLC for which the Principal Broker and Assigned Agent are a member of must meet the following standards:

1. Principal owner(s) and assigned agents cannot be delinquent in the payment of any property tax, special assessment, special charge or special tax to the City of Milwaukee.
2. Principal owner(s) and assigned agents must not be delinquent in payments owed to other government entities (such as State of Wisconsin Unemployment or Workman's Compensation divisions) or have an unsatisfactory history or government or civil judgments which would indicate an inability to satisfactorily perform the work required under the Broker Services contract.
3. Principal owner(s) and assigned agents must not be debarred by the U.S. Dept. of Housing and Urban Development or any City of Milwaukee Department.
4. Principal owner(s) and assigned agents cannot have outstanding judgments from the City of Milwaukee

5. Principal owner(s) and assigned agents cannot have outstanding health or building code violations or orders from the City of Milwaukee's Health Department or Department of Neighborhood Services that are not actively being abated
6. Principal owner(s) and assigned agents cannot have been convicted of violating an order of the City of Milwaukee's Health Department or Department of Neighborhood Services within the past year.
7. Principal owner(s) and assigned agents cannot have owned property in the City of Milwaukee that has, at any time within the past 5 years, been acquired by the City of Milwaukee by means of property-tax foreclosure judgement. This applies to any ownership group or LLC of which any prospective buyer has been a member

The DCD reserves the right to require additional information as a prerequisite to qualification.

IV. Proposal Submission Requirements and Selection Procedures

A. Proposal Contents

DCD wishes to partner with a licensed Real Estate Broker (or Brokers) with a proven track record of successfully selling foreclosed homes. Brokers must have extensive experience including working in the City of Milwaukee.

In order to simplify the review process and to obtain the maximum degree of comparability, proposals should be organized in the following manner. Brevity is encouraged. Failure to comply with these requirements may be cause for the proposal to be considered non-responsive.

DCD reserves the right to request additional clarifying information from prospective Brokers over and above that included in the proposal submissions.

1. Title Page -The title page should include - Request for Proposal #57987, **Real Estate Broker Services on behalf of DCD**, and the name of the broker responding to the RFQ, firm with which the broker is affiliated, address, telephone number, name of contact person, e-mail address, FAX number, and date.

2. Documentation of Past Experience and Qualifications – Respond in writing to the following questions to document your experience and qualifications to list properties for sale.

Tell us about your experience in listing and selling REO properties in the city of Milwaukee. Provide information about:

- How long you have been doing REO work.
- Percentage of your business that involves REO properties.
- Clients for which you have done REO work. (e.g., Fannie Mae, Wells Fargo, etc.)
- Volume of listings you have handled during the past two years.
- Neighborhoods in which you have listed properties
- Average days on market for the REO properties you list.
- Other facts that will help reviewers understand your qualifications to list and sell City-owned foreclosed properties.

Tell us about your experience writing offers on City-owned foreclosed properties. How many offers have you written? Do you actively seek buyers for City-owned properties? If so, what strategies do you use?

Describe the marketing strategies you use for REO properties. If you emphasize sales to particular types of buyers (such as investors, young families, etc.), explain how and why you direct your marketing to them, and how successful your efforts have been.

The City of Milwaukee will set initial asking prices for each property. Brokers will have the opportunity to recommend price adjustments, based on their own Broker Price Opinion (BPO). What factors, if any, make your BPO for an REO property different from the BPO for a non-REO property?

Provide a copy of your real estate broker's license with your response as well as copies of licenses for any agents you intend to assign to list City of Milwaukee Properties.

Provide information about the real estate firm with which you are associated.

Any other unique qualifications, such as knowledge of City of Milwaukee code requirements, familiarity with rehabilitation costs, and languages written and spoken fluently in a professional capacity other than English.

Submit the names and contact information of at least two references that are familiar with your ability to carry out the services you are proposing to provide.

All Brokers/Owners must provide a list of all LLCs of which they are a member.

The RLC is with the Broker/Owner. The Broker/Owner responds to the RFQ, and can feature the work of any particular Sales Agent(s) in their response, as appropriate. The Broker/Owner will be determining which Sales Agent(s) will be assigned to City real estate, and must provide the information of the Sales Agent(s) within the RFQ response.

3. Sample of Work – A copy of a listing currently being used by the City for a typical property, and scope of work describing needed repairs, is available at the following link under the heading for this RFP city.milwaukee.gov/DCD/RFPs.

Please write an MLS listing for the property and include it with your proposal. A lockbox will be installed at the sample property. If you would like to inspect the property, please contact Deborah McCollum-Gathing, manager of in rem property disposition, at (414) 286-5738 or Deborah.McCollum-Gathing@milwaukee.gov.)

Property Address: 2310 W Keefe Avenue

4. Local Business Enterprise

RFPs that are issued on or after August 10, 2009 include a Local Business Enterprise (LBE) incentive in accordance with Section 365 of the Milwaukee Code of Ordinances. The 2 attached forms (Local Business Enterprise Program Affidavit of Compliance and the Business Property Location Form) must be filled out correctly and submitted with your proposal to be considered for LBE status. It is the Proposer's responsibility to familiarize yourself with this ordinance prior to submitting your proposal. Information regarding LBE can be found in the attached forms and by accessing the city's web site: city.milwaukee.gov/home, under "Find it Fast" click on City Charter and Code of Ordinances, click on Table of Contents, and then scroll down to Ordinance No. 365.

5. Socially Responsible Contractor

If a proposer is seeking to qualify as a Socially Responsible Contractor (SRC), in accordance with Section 310-10 of the Milwaukee Code of Ordinances, they shall submit, as part of their proposal, the attached sworn affidavit describing actions taken and programs implemented to

eliminate, or substantially reduce, the barriers to employment for current and prospective employees of the contractor, and the outcomes of these actions and programs. It is your responsibility as a proposer to familiarize yourself with this ordinance and the supporting affidavit prior to submitting your proposal. Information regarding SRC can be found in the attached forms and by accessing the city's web site: city.milwaukee.gov/home, under "Find it Fast" click on City Charter and Code of Ordinances, click on Table of Contents, and then scroll down to Ordinance No. 310.

B. Selection of Broker

After screening proposals for responsiveness; DCD staff will evaluate proposals and assign points to each proposal based on the following criteria:

- Applicant's experience in listing and selling REO real estate on behalf of banks or other foreclosed asset owners (such as the City) in the City of Milwaukee (a maximum of 20 points).
- Appropriateness of marketing strategies used to seek buyers for City-owned properties (a maximum of 10 points).
- Thoroughness of applicant's overall proposal and overall responsiveness to this RFQ (a maximum of 10 points).
- The quality of MLS listings provided with the proposal (a maximum of 5 points).
- The quality of references provided (a maximum of 5 points).

If a Local Business Enterprise (LBE) is a responsive and responsible Proposer, an additional number of points equal to 5% of the maximum number of points used in the evaluation of the RFQ shall be applied to the total score attained by the LBE.

If a Socially Responsible Contractor (SRC) is a responsive and responsible Proposer, an additional number of points equal to 5% of the maximum number of points used in the evaluation of the RFQ shall be applied to the total score attained by the SRC.

Any proposer proposing to supply goods and/or services under Ordinance 310-10 (SRC), and who demonstrates entitlement to the preference provided by that ordinance, shall not also receive the benefit of the RFP award provided under the Local Business Enterprise (LBE) program in Section 365-7-1. A proposer may apply for both preferences, but will first be considered for entitlement to the preference provided under Ordinance 365-7-1.

Should a proposer seek to qualify for all both RFP preferences (LBE and SRC) and in a situation where multiple proposers are seeking to qualify for various different RFP preferences, precedence shall be given to the proposer seeking to qualify for an RFP incentive in the following descending order: 1. LBE RFP incentive; 2. SRC RFP incentive

C. Submission Deadline

All questions and communication regarding this RFQ process and scope of services should be submitted in writing (See #1 of General RFQ Requirements) to Celeste Jantz. Questions must be sent in writing **no later than October 17, 2023, 4:45 CDT**. Questions initiated after **October 17, 2023, 4:45 CDT** will not be considered. Any additional information, clarification and answers to the questions submitted by the deadline date will be posted on the Internet on the website referred to below in the form of an addendum to this RFQ by **October 19, 2023**: milwaukee.gov/DCD/RFPs

Proponents will be responsible for keeping apprised of any addenda to this RFQ as they are posted. All such addenda shall become a part of the RFQ, and all Proponents shall be bound by terms, conditions, and additional responses required by the addenda, whether or not the addenda were received by the Proponent.

The proposal should be submitted via e-mail to DCD to the following e-mail, no later than **11:00 a.m., October 26, 2023**. Late submissions will not be accepted.

Proposals **should be e-mailed** to: DCDPurchasing@milwaukee.gov

Please note: RACM cannot and does not guarantee that emailed proposals are received. Emailed proposals must be received in their entirety before the bid closing time.

Additionally: the size of one email cannot exceed 50MB

General DCD RFQ Requirements

1. Interpretations of RFQ

Any requests for interpretation should be submitted in writing to Celeste Jantz by email to cejantz@milwaukee.gov. No oral interpretations will be made to any Real Estate Agents(s) and/or Broker(s) as to the meaning of the RFQ requirements. All interpretations will be posted and answered on the Internet. If you received your RFQ from the Internet you will be responsible for keeping abreast of the addenda as they come in. All such addenda shall become a part of the RFQ, and all Real Estate Agents(s) and/or Broker(s) shall be bound by such, whether or not received by the Real Estate Agents(s) and/or Broker(s).

2. Receipt of Proposals

Proposals received prior to the time of opening will be secure. The officer whose duty it is to open them will decide when the specified time has arrived, and no proposal received thereafter will be considered. No responsibility will be attached to an officer for the premature opening of a proposal not properly addressed and identified.

Real Estate Agents(s) and/or Broker(s) are cautioned to allow ample time for transmittal of proposals by mail or otherwise. Real Estate Agents(s) and/or Broker(s) should secure correct information relative to the probable time of arrival and distribution of mail at the place where proposals are to be forwarded.

3. Withdrawal of Proposals

Proposals may be withdrawn on written request dispatched by the Real Estate Agents(s) and/or Broker(s) in time for delivery in the normal course of business prior to the time fixed for closing. Negligence on the part of the Real Estate Agents(s) and/or Broker(s) in preparing a proposal for offer to DCD confers no right of withdrawal or modification of the proposal after such proposal has been opened. In case of withdrawal of a proposal by a Real Estate Agents(s) and/or Broker(s), the Real Estate Agents(s) and/or Broker(s) will be disqualified thereby from submitting a second proposal on the contract at hand. See Section 66.0901(5), Wisconsin Statutes.

4. Rejection of Proposals

DCD reserves the right to reject the proposal of any Real Estate Agents(s) and/or Broker(s) who has previously failed to perform properly or to complete on time contracts of a similar nature, who is not in a position to perform the contract, or who has habitually and without just cause neglected the payment of bills or otherwise disregarded his obligations to subcontractors or employees.

5. Award of Contract

The Contract Management Team (as described in the Scope of Services under Task 1, Project Initiation) will evaluate proposals. All proposals will be evaluated against the evaluation factors stated in this RFQ. While the Contract Management Team intends to select a Real Estate Agents(s) and/or Broker(s) based on the proposals received, the Contract Management Team may invite the highest ranked firm/individual(s) to participate in an interview. If one or more interviews are to be scheduled, a letter will be sent to the firm/individual(s) that is/are selected to participate, and this/these firm/individual(s) may be asked to provide more specific written information about their qualifications, methodology, and costs. Firms/individuals participating in the interviews must send the project manager and staff who will work on this project.

After the contract is awarded, all of the firms who submitted a proposal will receive a written acknowledgment of their proposals. DCD will not reimburse firms for any expenses associated with the submission of proposals or participation in the interviews.

6. Termination of Contract for Cause

If, through any cause, the Real Estate Agents(s) and/or Broker(s) shall fail to fulfill in a timely and proper manner his obligations under this contract or if the Real Estate Agents(s) and/or Broker(s) shall violate any of the covenants, agreements or stipulations of this contract, DCD shall thereupon have the right to terminate this contract by giving written notice to the Real Estate Agents(s) and/or Broker(s) of such termination and specifying the effective date thereof, at least five work days before the effective date of such termination. In such event, all finished or unfinished documents, data, studies, surveys, reports, or other material related to the services prepared by the Real Estate Agents(s) and/or Broker(s) under this contract shall, at the option of DCD, become the property of DCD. Notwithstanding the above, the Real Estate Agents(s) and/or Broker(s) shall not be relieved of liability to DCD for damages sustained by DCD by virtue of any breach of the contract by the Real Estate Agents(s) and/or Broker(s).

7. Request for Proposal

This RFQ is not an offer to buy and must not be assumed as such. However, in the event a proposal results in contractual negotiations, the Real Estate Agents(s) and/or Broker(s) has the option to not convey and/or sell if compliance with any mandated clause or provision is undesirable or impossible.

No information will be available to any Real Estate Agents(s) and/or Broker(s) regarding the status of his response. However, DCD reserves the right to enter into discussion with Real Estate Agents(s) and/or Broker(s) for purposes of clarification or further information.

8. Miscellaneous

DCD reserves the right to waive informalities in any proposals, reject any or all proposals in whole or in part, with or without cause, and to accept that proposal which in its judgment best meets its needs. DCD will require an Affidavit of No Interest, which provides that no official or employee of the Redevelopment Authority, the Contract Management Team, and/or DCD has or will receive anything of value in connection with the issuance of this contract.

9. Equal Employment Opportunity

The Real Estate Agents(s) and/or Broker(s) agrees that there will not be discrimination as to race, sex, sexual orientation, religion, color, age, creed, or national origin in regard to obligation, work, and services performed under the terms of any contract ensuing from this RFQ. Real Estate Agents(s) and/or Broker(s) must agree to comply with Executive Order No. 11246, entitled "Equal Employment Opportunity" and as amended by Executive Order No. 11375, as supplemented by the Department of Labor Regulations (41 CFR, Part 60).

10. Indemnification

The Real Estate Agents(s) and/or Broker(s) agrees that it will indemnify, save and hold harmless the DCD and the City of Milwaukee, their officers, employees, or agents, from and against all claims, demands, actions, damages, loss, costs, liabilities, expenses, judgments, and litigation costs, including reasonable attorney's fees, photocopying expenses and expert witness fees, recovered from or asserted against the DCD or the City of Milwaukee on account of injury or damage to person or property or breach of contract to the extent that such damage, injury, or breach may be incident to, arising out of, or be caused, either directly or proximately, wholly or in part, by an act or omission,

negligence or misconduct on the part of the Real Estate Agents(s) and/or Broker(s) or any of its agents, servants, employees or subcontractors.

DCD shall tender the defense of any claim or action at law or in equity, arising out of or otherwise related to an act or omission, negligence, misconduct, or breach of contract on the part of the Real Estate Agents(s) and/or Broker(s) or any of its agents, servants, employees or subcontractors, to the Real Estate Agents(s) and/or Broker(s) or its insurer and, upon such tender, it shall be the duty of the Real Estate Agents(s) and/or Broker(s) and its insurer to defend such claim or action without cost or expense to DCD.

11. Slavery Disclosure

The successful Real Estate Agents(s) and/or Broker(s) will be required to submit an affidavit of compliance of slavery disclosure before a purchase order/contract can be executed (unless you have already done so and it is on file with the Business Operations Division of the City of Milwaukee).

12. Ethics

It is the policy of the Department of City Development and DCD, that contracts shall not be awarded to any Real Estate Agents(s) and/or Broker(s) that includes individuals who have left City employment within the past 12 months, or individuals who are currently members of any City boards or commissions.

13. Wisconsin Public Records Law

Both parties understand that DCD, is bound by the Wisconsin Public Records Law, and as such, all of the terms of this Agreement are subject to and conditioned on the provisions of Wis. Stat. 19.21, *et seq.* The Contractor acknowledges that it is obligated to assist DCD, in retaining and producing records that are subject to Wisconsin Public Records Law, and that the failure to do so shall constitute a material breach of this Agreement, and that the Contractor must defend and hold DCD, harmless from liability under that law. Except as otherwise authorized, those records shall be maintained for a period of seven years after receipt of final payment under this Agreement.

Attachment A - INSURANCE REQUIREMENTS

A. General Requirements

A certificate of insurance acceptable to City evidencing the insurance requirements is to be provided. The certificate shall state that the issued insurance policies meet the requirements as outlined below. All certificates are to be provided within 30 days of final execution of this Contract. If such certificate is not received, the City of Milwaukee has the authority to declare this Contract terminated.

All policies shall state that the City shall be afforded a thirty (30) day written notice of cancellation, non-renewal or material change by any insurers providing the coverage required by City for the duration of this Contract.

Insurance companies must be acceptable to City and must have a current A.M. Best rating of A-VIII or better.

All policies shall be written on an occurrence form, other than Real Estate Errors and Omissions as noted below.

If subcontractors are used, each must meet all requirements in sections A and B.

B. The minimum insurance requirements are as follows:

(1) Workers' Compensation and Employer's Liability

Workers' Compensation Statutory Coverage
Bodily Injury by Accident \$100,000 each accident
Bodily Injury by Disease \$500,000 policy limit
Bodily Injury by Disease \$100,000 each employee

- Employer's Liability at limits noted above or higher limits if needed to meet Umbrella underlying insurance requirements.
- Coverage shall be modified to include a Waiver of Subrogation Endorsement in favor of City including its directors, officers, agents, employees and volunteers

(2) Commercial General Liability

Commercial General Liability \$1,000,000 each occurrence
General Aggregate \$2,000,000 aggregate
Personal & Advertising Injury Limit \$1,000,000 each occurrence
Products - Completed Operations Aggregate \$2,000,000 aggregate
Medical Expense \$ 5,000 each person

- Coverage must be equivalent to ISO form CG0001 or better.
- The City of Milwaukee shall be added as an additional insured using ISO form CG2026 or its equivalent.
- Coverage shall be modified to include a Waiver of Subrogation Endorsement in favor of City including its directors, officers, agents, employees and volunteers.
- The policy shall include independent contractors (owners/contractors protective) and contractual liability.
- Coverage will apply on a primary and non-contributory basis. We suggest the following wording:
"If you have agreed in a written contract that this policy will be primary and without right of contribution from any insurance in force for an Additional Insured for liability arising out of your operations, and the contract was executed prior to the bodily injury, property damage, personal injury or advertising injury, then this insurance will be primary over, and we will not seek contribution from, such insurance.
- Coverage shall apply to the risks associated with or arising out of the services provided under this contract.

Attachment A - INSURANCE REQUIREMENTS

(3) Auto Liability

Combined Single Limit \$1,000,000 each accident
Medical Expense \$ 10,000 each person

- If the Contractor owns or has any long term leased vehicles, coverage must be for Any Auto (Symbol 1). If there are no owned or long term leased vehicles, then coverage must be for Hired and Non-Owned Auto Liability (Symbols 8 and 9).
- Coverage shall be modified to include a Waiver of Subrogation Endorsement in favor of City including its directors, officers, agents, employees and volunteers.
- The City of Milwaukee shall be added as an additional insured.
- Coverage shall include contractual liability for risks assumed in this contract.
- Coverage shall apply to the risks associated with or arising out of the services provided under this contract.
- If Federal or State government(s) require a Motor Carrier filing, such filing shall be made available to City upon request.

(4) Real Estate Errors and Omissions

Combined Single Limit \$1,000,000 each accident

- Coverage must remain in effect for a period of not less than two years beyond the termination date of the contract.
- If a claims-made form is used and a change of insurer occurs during the contract period, continuity of coverage must be maintained by either retaining the original retroactive date or exercising the extended reporting period endorsement option from the expired policy for a period of not less than two years, if the replacement insurer will not preserve the original retroactive date.
- Coverage shall be modified to include a Waiver of Subrogation Endorsement in favor of City including its directors, officers, agents, employees and volunteers.

Attachment C

DESIGNATION OF CONFIDENTIAL AND PROPRIETARY INFORMATION

Material submitted in response to the DCD Request for Qualifications No. 57909 includes proprietary and confidential information that qualifies as a trade secret, as provided in Wis. Stats. §§ 19.36(5) & 134.90, or is otherwise material that can be kept confidential under the Wisconsin Public Records Law. As such, the proponent asks that certain pages, as indicated below, of this proposal be treated as confidential material and not released, to the extent allowed by Wisconsin law. Therefore, I am providing the following information with the express understanding that it is being submitted to DCD under a pledge of confidentiality. I would not have submitted this information had the DCD not pledged to keep it confidential* and request that the following pages not be released:

<u>Section</u>	<u>Page</u>	<u>Topic</u>

*NOTE: Proponents are cautioned that the ENTIRE PROPOSAL WILL NOT FALL WITHIN THE CONFINES OF THE PLEDGE OF CONFIDENTIALITY. PLEASE LIMIT DESIGNATIONS OF CONFIDENTIALITY ONLY TO PROPRIETARY OR TRADE SECRET INFORMATION, OR OTHER LIMITED INFORMATION THAT YOU PROVIDE ONLY UPON RECEIPT OF A PLEDGE OF CONFIDENTIALITY

IN THE EVENT THE DESIGNATION OF CONFIDENTIALITY OF THIS INFORMATION IS CHALLENGED, THE UNDERSIGNED HEREBY AGREES TO PROVIDE LEGAL COUNSEL OR OTHER NECESSARY ASSISTANCE TO DEFEND THE DESIGNATION OF CONFIDENTIALITY.

Failure to include this designation in the proposal response may mean that all information provided, as part of the proposal response will be open to examination and copying.

Signature (Authorized Representative)	Telephone Number
Name (Please Print)	Company Name
Title	Date

NOTE: The DCD, as custodian of these public records has the obligation, pursuant to the Public Records Law, to determine whether the above information can be kept confidential.

The DCD will notify any proponent if a determination is made that the requested information cannot be kept confidential.

PROPRIETARY INFORMATION: Proprietary information submitted in response to this request for proposal will be handled in accordance with applicable DCD procurement regulations. A proponent responding to this proposal should not include any proprietary information as part of its proposal unless the proponent 1) designates the specific information that it maintains is proprietary and the reason(s) for such designation in a separate document to the DCD, Purchasing/Contract Services Division and 2) identifies the specific information when it occurs within the proposal.

The DCD preference is for the proponent to segregate all information designated as confidential into one section of the Request for Proposal and/or a separate document for easier removal to maintain its confidential status. The response to the proposal should indicate which portion of the requested information is confidential and where this information is located within the response, i.e. under separate cover, in confidential Section No. _____, etc. Data contained in the proposal and all documentation becomes the property of the DCD, Purchasing Division.

Generally, proposals are available for public review after the Purchasing/Contract Services Division has awarded and executed a contract.



DEPARTMENT OF ADMISTRATION
PURCHASING DIVISION

Revised: July 29, 2022

**LOCAL BUSINESS ENTERPRISE (LBE) PROGRAM
BUSINESS PROPERTY LOCATION FORM**

Important Note: This form must be submitted with your bid or proposal to be considered for LBE status.

Bid / RFP # _____

Property Location 1

Name:	
Address:	
City, State, Zip	
Total Square Feet	

Property Location 2

Name:	
Address:	
City, State, Zip	
Total Square Feet	

Property Location 3

Name:	
Address:	
City, State, Zip	
Total Square Feet	

Property Location 4

Name:	
Address:	
City, State, Zip	
Total Square Feet	

**PLEASE SUBMIT THIS FORM WTH YOUR BID OR PROPOSAL SUBMISSION
AS INSTRUCTED IN THE SOLICITATION.**



DEPARTMENT OF ADMINISTRATION-PURCHASING DIVISION

**SOCIALLY-RESPONSIBLE CONTRACTORS (SRC)
AFFIDAVIT OF COMPLIANCE**

NOTE: This affidavit must be completed in its entirety and submitted with your bid or proposal to be considered for SRC bid incentive.

Bid or RFP #: _____

Company Name: _____

Address, City, State, Zip: _____

A “Socially-Responsible Contractor” or “SRC” is an entity submitting a bid as part of the City’s formal competitive bidding or Request for Proposal (RFP) process that has acted or implemented a program to eliminate, or significantly reduce, barriers to employment for current and prospective employees of the contractor. Actions or implemented programs shall include at least three (3) of the programs listed in **Section I** below. To indicate which programs you have acted or implemented, place a checkmark in the box next to each item pertaining to the business entity as a bidder or proposer for the City of Milwaukee.

I. SRC CRITERIA

- A. Hire persons with felony convictions;
- B. Assist current or prospective employees with earning their high school diploma;
- C. Underwrite or facilitate industry-linked career-assessed pre-employment services and subsidized work experience including: internships, job shadowing, on-the-job training, and summer employment;
- D. Partner with an employment service agency to monitor and track individualized employment plans;
- E. Provide, underwrite, or facilitate industry-linked career-based instruction to current or prospective employees in areas such as the following: blueprint reading, basic math and measurement, technical math, labor history, construction culture and essential skills, health and safety awareness, manufacturing processes and production, maintenance, and budgeting and financial literacy;
- F. Provide or facilitate occupational skills training and related adult mentoring and networking;
- G. Underwrite or facilitate subsidized or unsubsidized programs which provide supportive services for current or prospective employees to obtain or fund the following:
 - A valid driver’s license
 - Transportation vouchers to work and home
 - Appropriate work attire, work safety gear, and other needed equipment
 - Testing and certification fees
 - Legal aid services
 - Child care and family-related dependent care
 - Emergency housing, health care, and short-term emergency assistance
 - Career and training services
 - School supplies, books, and fees
 - Referrals for medical services and exams
 - Reasonable accommodations for persons with disabilities
- H. Partner with employment agencies to supplement subsidized wages to ensure employees receive a living wage;
- I. Provide breast feeding facilities for employees who are nursing children;
- J. Provide a minimum of 120 hours of paid sick leave;
- K. Provide a minimum of five (5) paid sick days;
- L. Provide an employer-assisted housing program providing homebuyer assistance in the form of mortgages, down payment assistance, or homebuyer education for residences within walking distance of their employer;
- M. Provide assistance to reduce fees and penalties on tardy child support payments, manage payment of child support arrears, and become current on child support obligations.

II. DISCLOSURE

The purpose of the *Socially-Responsible Contractor* Program (SRC) is to ensure contributions toward community betterment made by socially-responsible contractors are recognized and rewarded. Each bidder or proposer seeking to qualify for the SRC bid incentive shall submit, as part of its bid or proposal, this sworn affidavit describing actions taken and programs implemented to eliminate, or significantly reduce, the barriers to employment for current and prospective employees of the contractor. The outcomes of these actions and programs shall be described in verifiable detail in the section below. (Please include an attachment if additional line space is required).

This signed and notarized affidavit of compliance will be the contractor's sworn statement that the business satisfies the criteria for Socially-Responsible Contractors pursuant to Chapter 310-10 of the City of Milwaukee Code of Ordinances.

I hereby declare compliance with Chapter 310-10 of the City of Milwaukee Code of Ordinances.

Authorized Signature: _____
Printed Name: _____
Date: _____

III. NOTARIZATION

Subscribed to before me on this _____ day of _____ in the year _____, at
_____ County, _____ State.

NOTARY PUBLIC SIGNATURE: _____

(SEAL)

PRINT NAME: _____ My commission expires: _____

**PLEASE SUBMIT THIS FORM WITH YOUR BID OR PROPOSAL SUBMISSION ON BONFIRE
AS INSTRUCTED IN THE SOLICITATION.**