

## **REQUEST FOR PROPOSAL**

The Norfolk County Retirement System (“NCRS”) and the members of its Retirement Board (hereinafter “Board”) are seeking proposals from qualified property owners to lease office space, within Norfolk County, to use for the administrative offices of the NCRS. The Board has determined that this lease is subject to M.G.L. Chapter 30B, and Commonwealth of Massachusetts Regulations 840 C.M.R. - Public Employee Retirement Administration Commission.

All bidders are hereby advised that any proposal selected shall be subject to: (1) approval of the Board per the specified evaluation criteria, including but not limited to, the best interests of the NCRS and (2) a written contract/lease.

The Request For Proposals (“RFP”) will be available on Monday, November 13, 2023. A completed original, hard copy and an electronic copy by way of thumb/zip drive of the bidder’s RFP response, as well as separate Cost/Fee Proposal must be received no later than 12:00 P.M. EST on Friday, December 22, 2023. The NCRS will open any submitted proposals on Thursday, December 28, 2023, at 12:00 P.M. EST. The Board reserves the right to reject any or all bids. The Board further reserves the right to cancel or reject, in whole or in part, any or all proposals in the best interest of the NCRS.

The RFP will be posted on the NCRS’ website at <https://www.norfolkcountyretirement.org>.

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## PROCUREMENT CALENDAR

<u>Event</u>	<u>Date</u>	<u>Time</u>
RFP Released	November 13, 2023	N/A
Written Inquiries Due	November 22, 2023	12:00 P.M.
Proposals Due	December 22, 2023	12:00 P.M.
Opening of Proposals	December 28, 2023	12:00 P.M.

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## INTRODUCTION

The NCRS and its Board are seeking proposals from qualified property owners to lease office space with associated parking, within a specific geographic area in Norfolk County, to use for the administrative offices of the NCRS. The Board has determined that this lease is subject to M.G.L. Chapter 30B, and Commonwealth of Massachusetts Regulations 840 CMR - Public Employee Retirement Administration Commission.

Notice of this RFP is published in The Central Register of the Commonwealth of Massachusetts and The Patriot Ledger which is a daily morning newspaper published in Quincy, MA. All publications are in general circulation sufficient to inform the people of Norfolk County. Additionally, this RFP is posted on the Board's website located at <https://www.norfolkcountyretirement.org>.

The Board has not yet authorized the leasing of any property or appropriated funds. As such, any lease entered into pursuant to this RFP will be subject to the Board's authorization and appropriation at a duly noticed public meeting.

The successful bidder/property owner must be prepared to enter into a lease within sixty (60) days from the selection of the successful bid.

Any questions pertaining to this RFP are to be emailed directly to NCRS Compliance Officer Matthew L. Feeney, Esq. at [mfeeney@norfolkcrs.com](mailto:mfeeney@norfolkcrs.com). **It is required that "RFP Question(s)" is in the subject line of the email.**

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## INSTRUCTIONS TO BIDDERS

*Please read instructions before completing this questionnaire.*

1. Questions or inquiries requesting additional information must be in writing and sent via email to [mfeeney@norfolkcrs.com](mailto:mfeeney@norfolkcrs.com) with the subject “RFP Question(s)” before Wednesday, November 22, 2023, at 12:00 P.M.

*No responses will be made to inquiries received after that date and time.*

2. Proposals must be received by the NCRS in hand no later than 12:00 PM (EST) on Friday, December 22, 2023 (“closing date”).

*Proposals or unsolicited amendments will not be accepted after the closing date and time.*

3. Bidders may only correct, modify, or withdraw their proposals prior to the deadline stated in paragraph no. 2 above. Correction or modification must be in writing and must be admitted and received in the same manner as the original proposal. Requests to correct, modify or withdraw proposals must be in writing, and in terms of correction and modification, a complete corrected or modified RFP response should be submitted. Bidders may correct or modify or withdraw a proposal by written notice to the NCRS’ Compliance Officer at the email address specified above. After the opening of proposals, a bidder may not correct or modify the price or any other provisions of its proposal in a manner prejudicial to the interests of the NCRS, its Board, or fair competition, as determined by the Inspector General of the Commonwealth of Massachusetts

4. All questions and all blank spaces in the RFP must be completed in precise detail. Blank or incomplete responses to applicable RFP questions may preclude the proposal from consideration.

5. Bidders shall respond by providing one (1) hard copy of the RFP response by the closing date to NCRS Compliance Officer Matthew L. Feeney, Esq. at the address below.  
**“NCRS Real Property RFP.”**

Matthew. L. Feeney, Esq.  
Compliance Officer  
Norfolk County Retirement System  
480 Neponset Street, Building #15  
Canton, MA 02021

The response should be in a sealed envelope, and, on the envelope, it must clearly state **“NCRS Real Property RFP Response.”** Failure to do so shall result in the response not being considered by the NCRS. In this same envelope, the bidder should provide a

thumb/zip drive with an electronic copy of the bidder's RFP response. As will be discussed further below, each bidder must also provide a separate, sealed envelope containing the bidder's Cost/Fee Proposal. This Cost/Fee proposal shall also be provided in an electronic format by way of a thumb/zip drive. While the RFP response and the Cost/Fee Proposal must be submitted separately, the electronic versions of each may be provided on the same thumb/zip drive.

6. The Cost/Fee Proposal, submitted in a separate, sealed envelope shall be addressed to NCRS Compliance Officer Matthew Feeney, Esq. and shall clearly state **“NCRS Real Property RFP Response Cost/Fee Proposal.”** Failure to do so shall result in the Proposal not being considered by the NCRS. Further, it shall list the complete pricing proposal from the respondent and shall include the type of lease proposed (gross, triple-net, etc...), price proposed, any additional costs or services that are not covered by the Cost/Fee Proposal, any proposed rent abatement, and the length of proposed lease. Multiple offers may be included within one Cost/Fee Proposal should the bidder make offers that vary based on the length of the proposed lease. The Cost/Fee proposal shall also be provided in electronic format by means of a thumb/zip drive. Failure to do so shall result in the Proposal not being considered by the NCRS. As noted above, while the RFP response and the Cost/Fee Proposal must be submitted separately, the electronic versions of each may be provided on the same thumb/zip drive.

7. If deemed necessary by the Board, bidders may be selected for interview. Each bidder selected for an interview will be allotted sufficient time to orally present its proposal and to answer any questions that may be posed by the Board or person(s) appointed by the Board to interview bidders. The bidders will be evaluated on the basis of the criteria set forth in this RFP.

8. The Board reserves the right to make an award without interviews of any or all of the bidders. Therefore, the response proposals should be submitted initially on the most favorable and aggressive terms of both price and specification that the bidder can propose to the Board. The Board also reserves the right to reject, in its sole discretion, any and all proposals received, whether prior to or after any bidders' interviews. The Board shall have sole discretion in deciding which bidders, if any, will be considered and/or interviewed.

9. All bidders are hereby advised that any proposal selected shall be subject to (1) approval of the Board, per the specified evaluation criteria, including but not limited to, the best interests of the NCRS and (2) a written contract/lease. Failure to agree on mutually acceptable contract language for the lease will void the award of the proposed engagement to the selected bidder. In that event, the NCRS and its Board may re-consider other bidder submissions properly and timely filed per this RFP.

10. The Board shall have sole discretion in determining whether the parties are unable to reach agreement on acceptable language in the proposed lease.

11. All proposals must be signed by the owner of the property offered in the RFP Response Proposal. A proposal must be signed as follows:

- If the bidder is an individual, by him/her personally, or
  - If the bidder is a partnership, by the name of the partnership, followed by the signature of each general partner, or
  - If the bidder is a real estate nominee trust, by the name of the trust, followed by the signature of the trustee of the trust; or
  - If the bidder is a limited liability company, by the name of the limited liability company, followed by the signature of the managing member(s) of the limited liability company; or
  - If the bidder is a corporation, by the president/vice-president and the treasurer/assistant treasurer or any other authorized officers, whose signature must be attested to by the clerk/secretary of the corporation and the corporate seal affixed (see Attachment E)
12. The Board reserves the right to waive certain requirements or other protections in the event that the Board deems it to be in its best interest and that of the NCRS.
  13. The proposal shall contain a bidder certification that the RFP response proposal has been submitted in good faith and without collusion or fraud with any other person.
  14. The Board reserves the right to waive any minor errors or informalities in an RFP response proposal.
  15. With respect to the RFP, all answers should be in specific reference to the subject property.
  16. All questions and all blank spaces must be completed in precise detail. Blank or incomplete responses to applicable questions may preclude the RFP response proposal from Board consideration.
  17. Please answer as “N/A,” should any question not be applicable.
  18. Failure to submit required forms will result in the rejection of the RFP response proposal.
  19. An RFP response proposal must include all of the following attachments:
    - a. Certificate of Non-Collusion (Attachment A) properly completed and executed
    - b. Certificate of Tax Compliance (Attachment B)
    - c. Disclosure of Beneficial Interest Form (Attachment C) properly completed and executed.
    - d. Certificate of Vote (for corporate owned property only) (Attachment D)
    - e. Proposed Lease (*excluding any pricing/cost information*)
  20. All terms of the RFP response proposals submitted in response to this RFP, including the price stated therein, must remain firm for one year (or 365 days) following the

proposal opening date.

21. The Board reserves the right to reject any and all RFP response proposals in its sole discretion.
22. All proposals will be date/time stamped as they are received, and the NCRS' date/time stamp will be controlling. No proposals will be accepted after the time and date noted. Late delivery of materials due to any type of delivery system shall be cause for rejection.
23. Faxed proposals will be deemed non-responsive and will be rejected, regardless of the date/time received.
24. The Board will not accept any information or materials submitted after the Submission Deadline, unless said information or materials are provided in response to the Board's written request for such information or materials.
25. These requirements will be strictly enforced. Bidders are cautioned to hand deliver their proposals or to allow sufficient time for their proposals to be received by mail or other delivery service.
26. All proposals shall be unconditional according to their terms.
27. The Board reserves the right to request additional information from any and all Bidders if it is deemed necessary in order to identify the most advantageous proposal in the best interests of the NCRS.
28. This RFP is issued pursuant to G.L. c. 30B, § 16. The Board is interested in securing the specified property/office space at the lowest responsible price. However, the Board reserves the right to award the lease to the bidder offering the most advantageous combination of building facility characteristics, location, and lease price deemed to serve the NCRS' best interests and shall not be required to award the lease to the bidder offering simply the lowest price. The Board reserves the right to negotiate the lease price and other terms with the selected bidder in a manner not prejudicial to fair competition. Any award is subject to obtaining the proper zoning and regulatory approvals, to the extent any may be necessary to carry out the purposes of this RFP in the best interests of the NCRS. Any award is also subject to Board authorization and appropriation at a duly noticed public Board meeting.
29. The Board reserves the right to conduct site visits to verify the information provided in the RFP response proposals and to perform detailed evaluations of any property proposed prior to award. The bidder's failure to cooperate with the Board in terms of interviews, site visits and evaluations in this regard may result in rejection of the RFP response proposal.



## **SPECIFICATIONS OF DESIRED PROPERTY**

The Board will consider the suitability of the proposed property, including but not limited to: geographic location which the Board deems desirable and most accessible by NCRB members, employer units, Board Trustees, NCRS staff, and vendors/suppliers; factors relating to size of the available space; site access for vehicles and pedestrians; availability of and proximity to the building entrance for ordinary parking and handicapped parking; availability of minimum lease term; particular office build-out availability; security of the surrounding area; type of lease offered; proximity of office space to main lobby of building; and the overall condition and habitability of the property.

At a minimum, the property must satisfy certain geographic and other property criteria as set forth below in the Minimum Criteria section. The RFP response must indicate compliance with these specifications in order for the NCRS to consider the proposal response. Should the proposal satisfy the terms listed in the Minimum Criteria Section, the Board will then consider terms listed in the Comparative Criteria section below.

### **RFP COMMUNICATIONS:**

It is the sole responsibility of the bidder to ascertain the existence of any addenda and/or modifications disseminated by the NCRS or its Board, whether or not the same are mailed to, or received by, bidder. As this RFP has been published on the NCRS' website <https://www.norfolkcountyretirement.org>, all bidders are responsible for checking the NCRS' website for any addenda and/or modifications that are subsequently made to this RFP or the attachments.

The NCRS and its Board accept no liability for, and will provide no accommodation to bidders, who fail to check for amendments and/or modifications to this RFP and subsequently submit inadequate or incorrect responses. Bidders may contact the Board's Compliance Officer in the event this RFP is incomplete, or the bidder is having trouble obtaining any part of the RFP electronically through the Board's website <https://www.norfolkcountyretirement.org> including, and without limitation, the RFP, required forms and attachments.

Bidders with disabilities or hardships that seek reasonable accommodations, which may include the receipt of RFP information and/or addenda and/or modifications in an alternative format, must communicate such requests in writing and accommodation will be made by agreement.

All questions or inquiries concerning this RFP must be made in writing and sent by email to the Board's Compliance Officer. All inquiries received by 12:00 P.M. on November 22, 2023, will be considered. All answers to questions/inquiries will be posted on the Board's website <https://www.norfolkcountyretirement.org> and/or sent directly to the inquiring party.

## EVALUATION CRITERIA

Evaluation of proposals will be based upon information provided in the proposals, obtained from interviews, and/or on-site visits and from other generally available and verifiable information. The Board reserves the right to request clarification of proposal terms or additional information after the Submission Deadline.

Proposals will be evaluated based upon both minimum and comparative criteria. The Board will offer to lease the property/office space from the bidder who submits the most advantageous proposal based on consideration of specified minimum and comparative criteria deemed most advantageous and in the best interests of the NCRS.

**Minimum Criteria:** Each proposal must meet all of the following criteria in order to be considered for further evaluation:

- The property must be located entirely within one of the following zip codes:
  - 02062, 02021, 02090
- The property must have ample parking available such that at least once per month, the property can accommodate twenty-five (25) cars in addition to any other tenant parking needs.
- The property must have handicapped parking in close proximity to the main entrance of the building.
- The property must have between 6000 and 9500 square feet of usable office space.
- Any lease must be a for minimum of seven (7) years.
- Any lease must allow for an office build-out, at the cost of the owner.
- The building, parking areas and sidewalks must comply with the access requirements of the Massachusetts Architectural Access Board and applicable federal requirements;
- The property must comply with the zoning and building code requirements of the municipality in which the property is located;
- There are to be no restrictions in the deed already encumbering the property that will interfere with the intended use of the property; and
- If there are any easements, right-of-way privileges, restrictions or liens encumbering the property, they must be clearly stated on the Information Form or an attachment thereto.
- The office space must be accessible to employees twenty-four (24) hours a day and seven (7) days per week and the front doors of the building shall remain unlocked during normal business hours.

Proposals that do not meet the Minimum Criteria will be judged non-responsive and will not be reviewed further.

**Comparative Criteria:** The following Comparative Criteria will be applied to those RFP response proposals that meet the Minimum Criteria listed above. Given the scoring definitions provided below for each of the six (6) comparative criteria categories, a respondent shall provide as detailed of an answer as possible to each category listed in order to most fully inform the NCRS as to potential compatibility of a given property to the NCRS’s needs.

### 1) Geography of Location

Highly Advantageous	<b>The office space, located in one of the required zip codes, is in direct proximity to a major highway/interstate.</b>
Advantageous	<b>The office space, located in one of the required zip codes, is in close proximity to a major road.</b>
Not Advantageous	<b>The office space, located in one of the required zip codes, is not in close proximity to a major highway, interstate, or road.</b>
Unacceptable	<b>The office space falls outside one of the required zip codes.</b>

### 2) Build-Out Requirements

Highly Advantageous	<b>At the owner’s expense, the build-out shall include, but is not limited to, architectural design, updated carpeting, updated lighting, updated painting (as need be), eleven (11) offices, a large conference room, a reception area, copy room, multiple cubicles, a file storage area, an office supply storage area, kitchenette, and the structural/plumbing ability to add an internal bathroom or two.</b>
Advantageous	<b>At the owner’s expense, the build-out shall include, but is not limited to, architectural design, updated carpeting, updated lighting, updated painting (as need be), eleven (11) offices, a large conference room, a reception area, copy room, multiple cubicles, a file storage area, an office supply storage area, and a kitchenette.</b>
Not Advantageous	<b>The response does not satisfy the requirements as listed in the “Advantageous” description.</b>
Unacceptable	<b>Any build-out will be at the NCRS’ expense.</b>

### 3) Location of Space

Highly Advantageous	<b>The office space is on the first floor of the building and immediately off of the main lobby of the building.</b>
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Advantageous                    **The office space is on the first floor of the building, but is not immediately off of the main lobby, or is not on the first floor, but is immediately accessible off of an elevator from the lobby.**

Not Advantageous            **The office space requires an elevator and is not immediately accessible off of an elevator from the lobby.**

Unacceptable                **The office space is not on the first floor and only accessible by stairs.**

#### **4) Signage**

Highly Advantageous        **The respondent offers clear signage indicating that the NCRS is a tenant both on the street/entryway and in the building's lobby.**

Advantageous                **The respondent offers clear signage indicating that the NCRS is a tenant on the street/entryway or in the building's lobby.**

Not Advantageous            **The respondent does not offer clear signage indicating that the NCRS is a tenant both on the street/entryway and in the building's lobby.**

Unacceptable                **No signage is offered.**

#### **5) Size of Office Space**

Highly Advantageous        **Square footage of at least 7,000 but not greater than 8,000.**

Advantageous                **Square footage of at least 8,000, but not greater than 9,500.**

Not Advantageous            **Square footage of less than 7000 square feet.**

Unacceptable                **Square footage of less than 6000 square feet.**

#### **6) Type of Lease**

Highly Advantageous        **The respondent offers a gross lease that provides a fixed monthly cost to the NCRS.**

Advantageous                **The respondent offers a modified gross lease.**

Not Advantageous            **The respondent offers a triple-net lease.**

Unacceptable                **The respondent offers a lease less than (7) years.**

## **EVALUATION AND SELECTION PROCESS**

The Board may conduct site visits of properties offered for lease pursuant to this RFP. The bidder agrees to provide access to the Board and its consultants, contractors, agents and representatives to the entire property during the site visit(s) and have someone present with knowledge of the site conditions to answer questions. The Board will consider information obtained from site visits in the selection process.

The Board will evaluate proposals in accordance with the evaluation criteria set forth in this RFP. The NCRS and its Board are the awarding authority, and will select the most advantageous proposal, taking into consideration the evaluation criteria above, the price, and the best interests of the NCRS.

Any lease entered into pursuant to this RFP will be subject to NCRS Board Meeting authorization and appropriation.

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**PROPOSAL TO LEASE REAL PROPERTY TO THE NORFOLK COUNTY  
RETIREMENT SYSTEM**

**ATTACHMENT A**

**CERTIFICATIONS**

**CERTIFICATE OF NON-COLLUSION**

The undersigned certifies under penalties of perjury that this bid or proposal has been made and submitted in good faith and without collusion or fraud with any other person. As used in this certification, the word "person" shall mean natural person, business, partnership, corporation, committee, union, club or other organization, entity, or group of individuals.

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

\_\_\_\_\_  
Print Name & Title

\_\_\_\_\_  
Company Name

**(Note: This page must be included in the proposal submission)**

**PROPOSAL TO LEASE REAL PROPERTY TO THE NORFOLK COUNTY  
RETIREMENT SYSTEM**

**ATTACHMENT B**

**CERTIFICATIONS**

**CERTIFICATE OF TAX COMPLIANCE**

Pursuant to Chapter 62C of the Massachusetts General Laws, Section 49A (b), I

\_\_\_\_\_, authorized signatory for \_\_\_\_\_  
*Name of individual* *Name of owner*

Do hereby certify under the pains and penalties of perjury that said owner has complied with all laws of the Commonwealth of Massachusetts, relating to taxes, permit or other fees, reporting of employees and contractors, and withholding and remitting child support.

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

**(Note: This page must be included in the proposal submission)**

**PROPOSAL TO LEASE REAL PROPERTY TO THE NORFOLK COUNTY  
RETIREMENT SYSTEM**

**ATTACHMENT C**

DISCLOSURE OF BENEFICIAL INTERESTS IN REAL PROPERTY TRANSACTION

This form contains a disclosure of the names and addresses of all persons with a direct or indirect beneficial interest in the real estate transaction described below. This form must be filed with the Massachusetts Division of Capital Planning and Operations, as required by M.G.L. c. 7, § 40J, prior to the conveyance of or execution of a lease for the real property described below. Attach additional sheets if necessary.

1. Public agency involved in this transaction: Norfolk County Retirement System  
(Name of jurisdiction)

2. Complete legal description of the property:

3. Type of transaction:        Lease

4. Lessor(s):

Lessee(s): Norfolk County Retirement Board

5. Names and addresses of all persons who have or will have a direct or indirect beneficial interest in the real property described above. Note: *If a corporation has, or will have a direct, or indirect beneficial interest in the real property, the names of all stock holders must also be listed except that, if the stock of the corporation is for sale to the general public, the name of any person holding less than ten percent of the outstanding voting shares need not be disclosed.*

Name	Address
_____	_____
_____	_____
_____	_____
_____	_____



**PROPOSAL TO LEASE REAL PROPERTY TO NORFOLK COUNTY RETIREMENT SYSTEM**

5. (Continued)

None of the persons listed in this section is an official elected to public office in the Commonwealth of Massachusetts or is an employee of the Division of Capital Asset Management and Maintenance, except as noted below:

Name	Title or position
_____	_____
_____	_____

6. This section must be signed by the individuals (s) or organization (s) entering into this real property transaction with the public agency named in item 1. If this form is signed on behalf of a corporation, it must be signed by a duly authorized officer of that corporation.

The undersigned acknowledges that any changes or additions to item 4 of this form during the term of any lease or rental will require filing a new disclosure with the Division of Capital Asset Management and Maintenance within 30 days following the change or addition.

The undersigned swears under the pains and penalties of perjury that this form is complete and accurate in all respects.

Signature: \_\_\_\_\_

Printed name: \_\_\_\_\_

Title: \_\_\_\_\_

Date: \_\_\_\_\_

**(Note: This page must be included in the proposal submission)**

**PROPOSAL TO LEASE REAL PROPERTY TO THE NORFOLK COUNTY  
RETIREMENT SYSTEM (Corporate ownership only)**

**ATTACHMENT D**

**CERTIFICATE OF VOTE**

At a duly authorized meeting, held on \_\_\_\_\_ the Board of Directors

of the \_\_\_\_\_ it was VOTED, THAT

\_\_\_\_\_  
Name

\_\_\_\_\_  
Title/Office

of \_\_\_\_\_ be, and hereby is, authorized to execute contracts and bonds in the name, and on behalf of, said \_\_\_\_\_, and affix its corporate seal hereto; and such execution of any contract or obligation in the name of \_\_\_\_\_ on its behalf by such officer under seal of \_\_\_\_\_, shall be valid and binding upon.

I hereby certify that I am the clerk of the above named \_\_\_\_\_ and that \_\_\_\_\_ is the duly elected officer as above of said \_\_\_\_\_, and that the above vote has not been amended or rescinded and remains in full force and effect as of the date of this contract.

\_\_\_\_\_  
(Clerk)

\_\_\_\_\_  
(Date)

**(Note: This page must be included in the proposal submission)**

**PROPOSAL TO LEASE REAL PROPERTY TO THE NORFOLK COUNTY  
RETIREMENT SYSTEM**

**ATTACHMENT E**

**PROPOSED LEASE**

- Please attach a copy of a proposed lease document; however, PLEASE DO NOT INCLUDE in this document any reference to the fee proposal. Inclusion of such information may result in the Board excluding the entirety of the response.

**(Note: This page must be included in the proposal submission)**