

For more than 20 years Interact for Health has served as a catalyst to improve health by promoting health equity in Greater Cincinnati through community engagement, grants, research, education and policy. Interact is an independent nonprofit foundation that serves 20 counties in Ohio, Kentucky and Indiana.

Interact for Health is currently a tenant in Rookwood Tower, 3805 Edwards Road Suite 500, Cincinnati, OH 45209, leasing 27,490 square feet of office space on the fifth floor of the building. (Approximately 25% of this space is sublet.) Interact for Health's lease for this space is due to expire June 30, 2021.

Interact for Health is committed to a transparent process of **selection of an independent commercial real estate advisor or consultant**, with the intention to secure the best possible real estate solution for Interact for Health's long-term needs, while ensuring an optimal financial and operational outcome.

Interact for Health values diversity and this will be one of the criteria used to evaluate and contract with consultants.

SERVICES TO BE PERFORMED

The chosen firm must be an independent consultant that will act as a liaison with real estate brokers in the area and evaluate possibilities for leasing, building, or buying and renovating.

The chosen firm must provide integrated real estate consultant services, including the following:

1. *A strategic planning and needs analysis, including:*
 - A review of business needs with respect to space, including workplace assessment, review of current space standards and staffing

(current and future) as well as planned operational or strategic changes that may affect future space needs.

- Criteria development defining the requirements, as well as evaluation tools with which to assess alternative properties.
 - Development of strategic options and associated business case, describing risks, costs and benefits.
 - Strategies for current space.
2. *Site search, brokerage and negotiation services, which include:*
 - Market research and site searches, and creation of market reports that support the business case of strategic options.
 - Identification of all suitable available sites that meet the needs identified during the strategic planning process.
 - Implementation of the broker RFP process, analysis of proposals and offers and recommendations through each stage of the process.

Interact for Health prefers, but does not require, that its selected independent consultant act as its representative through the life of the project and to provide comprehensive services including transaction support, consulting team assembly, oversight of design and specifications, and construction and move management, as applicable. Additional services beyond site selection may be included as part of an add-on contract.

Presentations to the entire Board of Directors or its committees may be required throughout the selection process.

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PROPOSAL REQUIREMENTS

Proposals must include the following:

- A project plan that provides an outline of the proponent's understanding of the scope of work included in this RFP and the proposed plan to undertake and execute the work contemplated. Please detail any assumptions that you are making.
- Description of proposed method, tools and approach to meet above requirements.
- The proposed fee structure or methods of pricing; provide the basis upon which compensation is received.
- Description of the firm, showing structure, size, locations, annual revenue volumes and financial strength, corporate structure and years in business.
- Description of service lines offered, and number of personnel in each service line including: strategic planning, brokerage and advisory services, project management, and move management.
- A description of the proposed real estate advisory team providing services, describing roles, with detailed résumés.
- An explanation of why Interact for Health should choose your firm for providing real estate advisory services.
- References and contact information from at least two clients.
- A statement of the firm's independence from Interact for Health and InterAct for Change.

Note: The real estate advisory team shall maintain the following insurance policies, covering the activities of its services in response to this RFP:

- Commercial general liability of \$2 million combined single limit per occurrence and annual aggregate; and umbrella form excess liability insurance in excess of the limits provided by the commercial general liability policy with limits of \$3 million per occurrence and annual aggregate.
- Interact for Health will be additionally insured under the real estate advisory team's

commercial general liability policy described above to the extent of loss attributable to the real estate advisory team's negligence. The real estate advisory team's insurance will not be called upon to respond to or cover Interact for Health's negligence or willful misconduct.

SUBMITTING A PROPOSAL

Proposals must be received by **5 p.m. Tuesday, July 16, 2019.**

Proposals can be emailed to pruwe@interactforhealth.org or sent to

Interact for Health
Rookwood Tower
3805 Edwards Road, Suite 500
Cincinnati, OH 45209-1948
Attn: Patti Ruwe

Email submissions are preferred.

If you have questions, please contact Interact for Health Board Member Chris Makaroff at makaroca@miamioh.edu or 513-529-1234, or Patti Ruwe, Interact for Health Vice President, Finance and Investments, at 513-458-6603 or pruwe@interactforhealth.org.