



April 5, 2022

Special Called Finance Committee Meeting

Bill Brittain, *County Mayor*

511 West Second North Street • Morristown, TN 37814 • *office.* 423.586.1931 • *fax.* 423.585.4699

www.HamblenCountyTN.gov • *email.* bbrittain@co.hamblen.tn.us

Request for Qualifications 2022-02Q

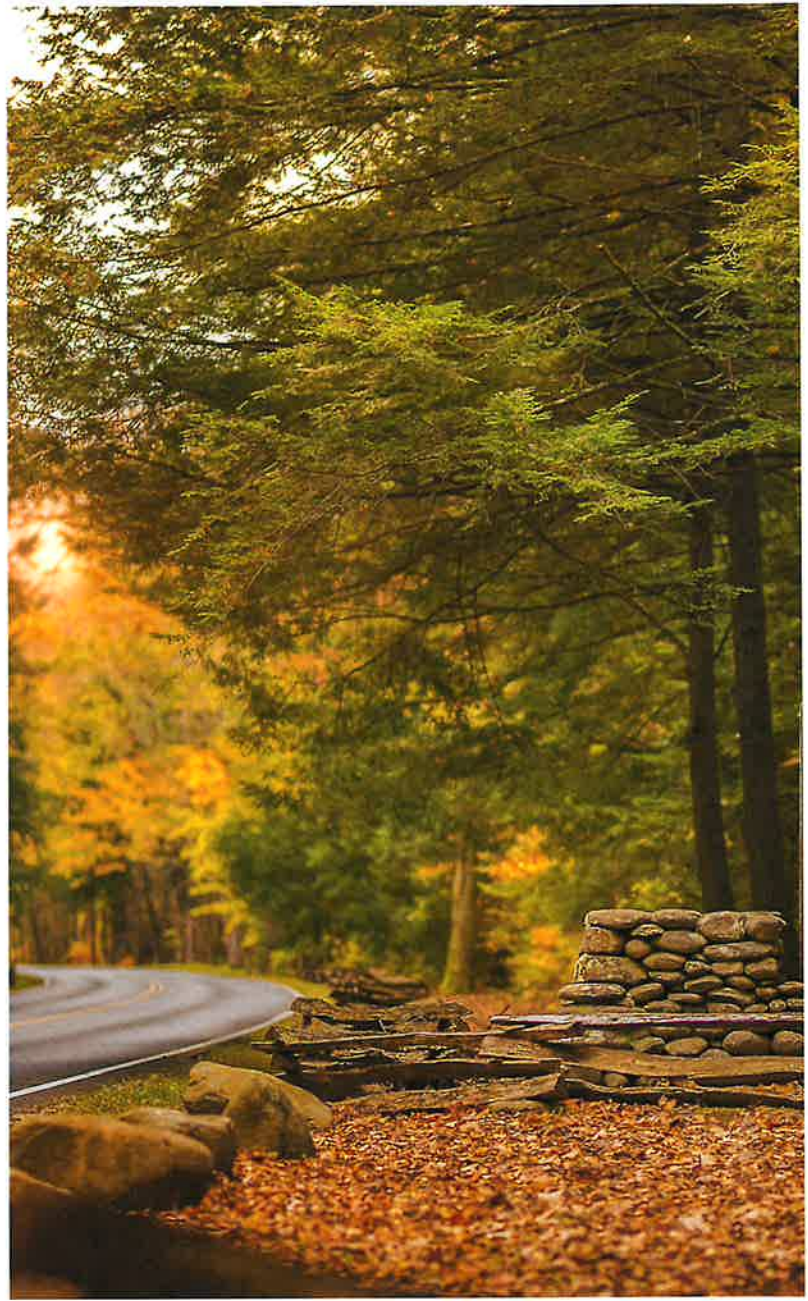
Response to Hamblen County Government

Real Estate Agent Services

March 30, 2022

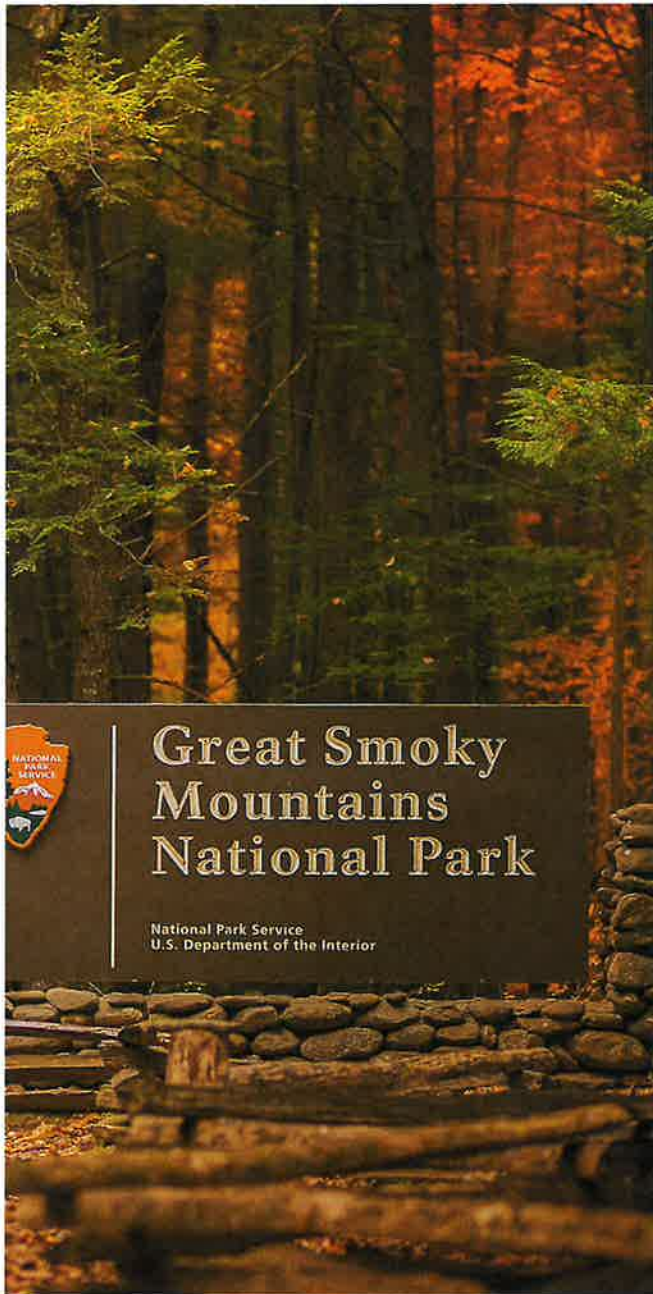
Table of Contents

1. Complete Original Signed & Initialed RFQ Packet & Any Addenda Issued
2. Statement of Qualifications
3. Exceptions Form
4. Anti-Collusion Statement
5. Certificate of Compliance with Iran Divestment Act
6. Sample Contract



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Executive Summary



YOUR GOALS

We understand that the Hamblen County is seeking world class acquisition representation services to facilitate your purchase and lease of property. The market in Hamblen County is dynamic, requiring a partner like CBRE, with the scale, market knowledge, and proven processes to help implement your vision.

OUR SOLUTIONS

CBRE offers Hamblen County the area's leading commercial real estate services platform with over \$11.4M in closed transactions in 2021 in the Knoxville and Hamblen County area and over \$3.0B in total consideration statewide. Our team of 200+ brokers, research, marketing, mapping, and other support staff represent some of the area's leading entities on their property needs. Our Public Institutions & Education Solutions (PIES) practice brings proven success representing public sector clients nationwide on their most pressing real estate projects.

One of the priorities for Hamblen County on this assignment will be an ability to access both on- and off-market opportunities to acquire land. CBRE identifies and engages owners of on- and off-market properties by leveraging our deep network in the area and the entrepreneurialism of our brokers. Our leadership in the Hamblen County area means that we have a better understanding of the competitive landscape for acquisitions and more information about acquisition targets before they even hit the market.

The CBRE team is ready to support your acquisition needs as a purchaser throughout the acquisition process. Our approach to acquisitions is grounded in careful planning and preparation to ensure that Hamblen County's operational and financial goals are met, and that the solution is executed seamlessly and with minimal risk to the organization. Our experience with similar public sector clients means we can represent Hamblen with no learning curve.

THE CBRE DIFFERENCE

- + We establish your financial, operational and qualitative criteria and build consensus on site selection needs before engaging the market.
- + We identify viable alternatives in the market and leverage them to negotiate better deal terms for the County
- + We integrate market insight from our colleagues across multiple service lines, markets and product types, as appropriate, to fully vet all opportunities and potential challenges.
- + We negotiate from a position of strength on our clients' behalf to secure superior economics, concessions and flexibility to meet their needs.

01

Completed Original RFQ Packet



REQUEST FOR QUALIFICATIONS

Office of the Hamblen County Mayor
 511 West Second North Street
 Morristown, TN 37814

RFQ TIMELINE: Times listed below are in Eastern Standard Time.

Date Issued:	Tuesday, March 8, 2022
RFQ Title:	Real Estate Agent Services for Hamblen County Government (2022-02Q)
RFQ Question Deadline:	Friday, March 18, 2022 @ 2:00p.m. <i>All correspondence and communication must be via email to the designated Hamblen County project administrator listed on page 3. Questions submitted by telephone call will <u>not</u> be answered. Questions submitted after this deadline will <u>not</u> be answered.</i>
RFQ Answer Deadline:	Tuesday, March 22, 2022 @ 4:00p.m.
RFQ Submission Deadline Date & Time:	Wednesday, March 30, 2022 @ 2:00p.m. <i>If the Hamblen County Courthouse is closed for business at the time scheduled for proposal opening, for whatever reason, proposals will be accepted and opened on the next business day of the County, at the originally scheduled hour.</i>
Presentations/Interviews:	TBA
RFQ Submission Opening Location:	Hamblen County Courthouse, West Wing Conference Room, 1 st Floor, Administrative Building



HAMBLETON COUNTY GOVERNMENT
Request for Qualifications – Real Estate Agent Services Hamblen County Government (2022-02Q)

INTRODUCTION:

Hamblen County Government (hereafter referred to as "County") is requesting qualifications for licensed real estate agents to provide specified professional services for anticipated real estate transactions during the next two (2) years.

This document is a Request for Qualifications. It differs from a Request for Bid or Proposal in that the County is seeking the most qualified respondent. Submissions will be evaluated in accordance with the requirements stated in this solicitation and any addenda issued. The County, upon review of the received submissions, may request and schedule respondents to make a presentation so as to obtain additional information and/or clarification of their submission. Once the review process is finished, the company with the highest score will be determined to be the most qualified and contract negotiations will begin at that point. In the event that a contract cannot be negotiated with the top ranked respondent, the County reserves the right to negotiate with the next qualified respondent and so forth until a contract can be secured.

TABLE OF CONTENTS:

- I. Project Overview
- II. General Information
- III. Scope of Work
- IV. Submission Requirements
- V. Award Criteria Explanation and Points
- VI. Statement of Qualifications
- VII. Forms:
 - a. Exceptions Form
 - b. Anti-Collusion Statement
 - c. Certificate of Compliance Iran Divestment Act
- VIII. Proposal Submission Checklist



HAMBLLEN COUNTY GOVERNMENT
Request for Qualifications – Real Estate Agent Services Hamblen County Government (2022-02Q)

I. PROJECT OVERVIEW:

The County is currently looking for a qualified real estate agent for specified professional services for anticipated real estate transactions as listed in the scope of services for two (2) consecutive years beginning May 1, 2022 with an option to renew two (2), 1-year extensions.

II. GENERAL INFORMATION:

Project Administrator:

The County Finance Department is the sole point-of-contact for this procurement. All communication between prospective proposers and the County upon receipt of this RFQ shall be in email form to the County Finance Department as follows:

Johnna Harrell
511 West Second North Street
Morristown, TN 37814
Telephone: 423-586-1931
Email: Johnna.harrell@co.hamblen.tn.us

Any other communication will be considered unofficial and non-binding on the County. Communication directed to parties other than the County Finance Department may result in disqualification of the prospective proposer.

RFQ Questions and Answers:

Questions regarding this RFQ will be accepted via email to the Project Administrator until 2:00p.m. Friday, March 18, 2022. Questions submitted by telephone call will not be answered. Questions submitted after this deadline will not be answered.

Questions *and* Answers will be produced in writing and submitted to all prospective respondents known to the County and will be listed on the Hamblen County Government website, www.hamblencountyttn.gov, under the Bids & Proposals Tab no later than 4:00p.m. Tuesday, March 22, 2022.

Proprietary Information and Public Disclosure:

Materials submitted in response to this competitive procurement shall become the property of Hamblen County. All submissions shall remain sealed until the deadline for submissions has expired. Once qualifications are submitted to Hamblen County Government and opened, it constitutes a public record and is subject to the open records request pursuant to the Tennessee Open Records Act.



Cost of Proposal Submission:

The County will not be liable for any costs incurred by any respondent in preparation of a response to this RFQ, in conducting of a presentation, or any other activities related to responding to this RFQ.

Revisions to the RFQ:

In the event it becomes necessary to revise any part of this RFQ, addenda will be produced in writing and submitted to all prospective respondents known to the County and will be listed on the Hamblen County website, www.hamblencountyttn.gov, under the Bids and Proposals Tab. All addenda issued are required to be signed and submitted with the proposal. Failure to submit signed addenda will result in the proposal being deemed nonresponsive and may be disqualified from review.

The County reserves the right to cancel or to reissue this RFQ in whole or in part prior to the execution of a contract.

Period of Performance:

The period of performance of any contract resulting from this RFQ is tentatively scheduled to begin on May 1, 2022 and remain effective for two (2) consecutive years with the option to renew two (2), 1-year extensions.

Contract Terms:

All contracts between parties as a result of this RFQ shall be governed by and enforced in accordance with the laws of the State of Tennessee. In the event a dispute arises, the venue shall be in Hamblen County, Tennessee. The County shall require the person with authority to bind the company to sign all agreement(s) with the County.

Contract Termination:

The County reserves the right to cancel the contract at any time for breach of contractual obligations without penalty or recourse by giving the successful firm a written notice of such termination of at least thirty (30) calendar days prior to said cancellation. Prior to issuing such a notice, the County will, if appropriate, provide the successful firm with an opportunity to cure the breach within a reasonable period of time. Should the County exercise its right to terminate the contract for such reasons, the termination shall become effective on the date as specified in the notice of termination sent to the successful firm. The successful firm shall be entitled to receive just and equitable compensation for the work provided pursuant to the contract prior to the effective date of cancellation.



HAMBLÉN COUNTY GOVERNMENT
Request for Qualifications – Real Estate Agent Services Hamblen County Government (2022-02Q)

No Obligation:

The County reserves the right to accept or reject any or all submissions at its sole discretion without penalty and to not issue a contract as a result of this RFQ. The County also has the right to waive any formal defects in submissions when deemed in the best interest of the County. Further, the County reserves the right to negotiate with any respondent concerning matters which the County determines require clarification or changes not in conformity with the specific requirements set forth herein.

Right To Withdraw:

Respondents have the right to request withdrawal of their submissions from consideration due to error by giving notice at any time before and not later than two (2) days after submissions are publicly opened.

Commitment of Funds:

The Hamblen County Legislative Body are the only individuals who may legally commit the County to the expenditures of funds for a contract resulting from this RFQ. No cost chargeable to the proposed contract may be incurred before receipt of a fully executed contract. Obligations on contracts that envision extended funding through successive fiscal periods shall be contingent upon actual appropriations for the following years.

III. SCOPE OF WORK:

- Assist the County Mayor and the County Commission with the search for property for needs that may arise;
- Assist the County Mayor and the County Commission with the negotiation for the purchase and/or lease of identified property;
- Assist the County Mayor and the County Commission with the process of closing the purchase of identified property;
- The term of the contract will be two (2) consecutive years beginning May 1, 2022 with the option to renew two (2), 1-year extensions;
- The County and successful firm awarded the contract will enter into a mutual contract and this RFQ will become part of the contract. Include the company's sample contract with your proposal for Hamblen County's consideration. The County reserves the right to negotiate terms and conditions of any contract with the proposed vendor.



HAMBLÉN COUNTY GOVERNMENT
Request for Qualifications – Real Estate Agent Services Hamblen County Government (2022-02Q)

IV. SUBMISSION REQUIREMENTS:

Respondents are required to submit one (1) complete packet either electronically or in a sealed envelope based on the instructions below. Qualifications, whether mailed, hand-delivered, or electronically submitted must arrive no later than 2:00p.m. Eastern Standard Time on Wednesday, March 30, 2022.

Instructions for Submitting Qualifications Electronically:

Electronic submissions should be sent to Johnna.harrell@co.hamblen.tn.us via WeTransfer.com, an internet-based computer file transfer service. The message line of the WeTransfer page must state: **REAL ESTATE AGENT SERVICES for HAMBLÉN COUNTY GOVERNMENT RFQ#2022-02Q, WEDNESDAY, MARCH 30, 2022 @ 2:00P.M.** Please note: Qualifications should be submitted no earlier than March 23, 2022 as the documents are only available for download for seven (7) days and we cannot access them for any reason prior to Wednesday, March 30, 2022 @ 2:00p.m.

Instructions for Submitting Hard Copies of Qualifications:

Envelopes **must** arrive **sealed** and clearly marked with **REAL ESTATE AGENT SERVICES for HAMBLÉN COUNTY GOVERNMENT RFQ#2022-02Q, MARCH 30, 2022 @ 2:00P.M.** on the outside of the envelope to the Hamblen County Mayor's Office, 511 West Second North Street, Morristown, TN 37814, Attention: Johnna Harrell.

Respondents assume the risk for the method of delivery chosen. The County assumes no responsibility for delays caused by any delivery service whether in-person or electronically. Late proposals will not be accepted.

Proposal Content:

All items listed below must be included in your submission. Failure to submit any of these documents will result in your submission being considered nonresponsive and therefore, may be disqualified from review.

1. Complete Original Signed & Initialed RFQ Packet & Any Addenda Issued
2. Statement of Qualifications (attached)
3. Exceptions Form (attached)
4. Anti-Collusion Statement (attached)
5. Certificate of Compliance with Iran Divestment Act (attached)
6. Sample Contract



Statement of Qualifications:

The respondent must complete the Statement of Qualifications on pages 9-12 of this RFQ. If additional pages are needed to complete a section, the section number **must** be listed on the page header.

Exceptions Form:

If a bidder **has** exceptions to the scope of services listed in this document, they must be listed on the exceptions form on page 13 of this document.

Anti-Collusion Statement:

The respondent certifies by signing the anti-collusion statement on page 14 of this RFQ that this submission is made without prior understanding, agreement, or accord with any other person submitting qualifications for the same service and that this submission is in all respects bona fide, fair and not the result of any act of fraud or collusion with another person engaged in the same line of business or commerce.

Iran Divestment Act:

The respondent must certify on page 15 of this RFQ that neither they nor any of their successors, parent companies, subsidiaries or companies under common ownership or control certifies, under penalty of perjury, that to the best of their knowledge and belief that they are not on the list created pursuant to Tennessee Code Annotated § 12-12-106.

Signatures:

The Statement of Qualifications, Exceptions Form, Anti-Collusion Statement, Certification of Compliance with the Iran Divestment Act, and all RFQ Amendments must be signed and dated by a person authorized to legally bind the respondent to a contractual relationship.

Presentations/Interviews:

The County, upon review of the received qualification submissions, may request and schedule a presentation for the respondents with the top three scores so as to obtain additional information and/or clarification of the submission.

Presentations/Interviews will be structured oral presentations for the top three highest scores. Presenters will be allowed 10 minutes to discuss their qualifications followed by a 20-minute Q&A session with the Finance Committee. The date, time and room location is to be announced.

HAMBLLEN COUNTY GOVERNMENT
Request for Qualifications – Real Estate Agent Services Hamblen County Government (2022-02Q)

V. AWARD CRITERIA EXPLANATION AND POINTS:

Evaluations will be based on the information submitted on the Statement of Qualifications Form (pages 9-12). An explanation of the information being requested is listed in each section along with the corresponding maximum number of points that can be awarded. Proposals will be accepted until 2:00p.m., Wednesday, March 30, 2022. The proposals will then be given to the Hamblen County's Finance Committee. The Finance Committee will evaluate and score the responses. The top three scores may be asked to make a presentation to the Finance Committee. The Finance Committee will make a recommendation to the full county commission for consideration of the contract award.

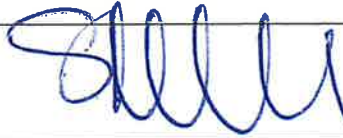
Evaluation Criteria Overview	
Criteria	Maximum Number of Points Available
Statement of Qualifications <ul style="list-style-type: none">• Professional Certifications• Experience with Commercial Real Estate	30
Business Methodology <ul style="list-style-type: none">• Demonstrate how the proposer meets the needs of its clients	30
List of Completed Projects <ul style="list-style-type: none">• A summary of the firms' relevant experience during the past five (5) years• Client Reference Feedback	40
TOTAL Points Available:	100



HAMBLLEN COUNTY GOVERNMENT
Request for Qualifications – Real Estate Agent Services Hamblen County Government (2022-02Q)

VI. STATEMENT OF QUALIFICATIONS:

If additional pages are needed to submit information, the page header should be marked with the corresponding Section number...i.e. Section I – Company Introduction.

Section I – Company Introduction (Not Scored):	
Company Legal Name:	CBRE, Inc.
Primary Point-of-Contact:	Brian Tapp
Email of Primary Point-of-Contact:	brian.tapp@cbre.com
Street Address:	4315 Kingston Pike, Suite 210 Knoxville, TN 37919
Telephone Number:	1 865 719 5703
Federal Tax ID #	95-2743174
Authorized Signature (blue ink):	
Date of Signature:	30 March 2022

Section II – Qualifications of the Firm and/or Team for this Project (30 Total Maximum Points):

NOTE: If additional pages are needed, Section II must be listed on each additional page.

Submit a copy of your real estate broker's license and the other certifications you have earned.

- a) The successful proposer must hold a real estate broker's license from the State of Tennessee.
- b) Other designations and certifications that are not required but preferred:
 - i. Certified Commercial Investment Member (CCIM)
 - ii. Certified Commercial Real Estate Advisor (CCREA)

The proposal must include an organizational chart identifying the team that will be assigned to the project and outlining the individual and/or group experience and abilities of that specific team. Submit resumes of key personnel that will be assigned to this project.

List the professional organizations of which you are a member.

See following pages



HAMBLEN COUNTY GOVERNMENT
Request for Qualifications – Real Estate Agent Services Hamblen County Government (2022-02Q)

Section III – Experience with Similar Projects including reference comments from projects listed below.(40 Total Maximum Points):

List at least 5 clients you have represented during the last 5 years.

NOTE: If additional pages are needed, Section III must be listed on each additional page.

<u>Client #1</u> Business Name: City of Maryville	<u>Client #2</u> Business Name: BHS Corrugated-North America ,Inc.
Contact Name: Greg McClain	Contact Name: Bill Wantz
Email Address: gmcclain@maryville-tn.gov	Email Address: wwantz@bhs-world.com
Phone Number: (865) 273 3401	Phone Number: (865) 828 5702
<u>Client #3</u> Business Name: State of TN	<u>Client #4</u> Business Name: City of Fort Myers
Contact Name: Stacey Nelson	Contact Name: Steven Belden
Email Address: stacey.nelson@tn.gov	Email Address: sbelden@cityftmyers.com
Phone Number: (615) 917 2890	Phone Number: (239) 321 7902
<u>Client #5</u> Division of Administrative Services Business Name: Florida Dept. of Highway Safety and Motor Vehicles Contact Name: Kevin Bailey Email Address: KevinBailey@flhsmv.gov Phone Number: (850) 617 3400	<p>List the percentage of your business over the past five (5) years that involved commercial property.</p> <p align="center">100%</p>

HAMBLETON COUNTY GOVERNMENT
Request for Qualifications – Real Estate Agent Services Hamblen County Government (2022-02Q)

Section IV – Business Methodology (30 Total Maximum Points):

Describe your methodology used to determine whether a property meets the needs of your client and how the purchase/lease amount is negotiated.

See following pages

Certificate of Insurance (Not Scored)

Proposer is willing to provide a Certificate of Insurance with Hamblen County named as additional insured.

Agree

Do Not Agree



HAMBLETON COUNTY GOVERNMENT
Request for Qualifications – Real Estate Agent Services Hambleton County Government (2022-02Q)

VII. FORMS:

a) EXCEPTIONS FORM

Proposers shall note in the space provided below any exceptions or deviations in any way from the minimum standards of any section of this RFQ. Submissions should provide complete detail of exceptions or deviations.

Proposal Exceptions

<u>Item</u>	<u>Description of Exception</u>
N/A	N/A

By signing below, proposer acknowledges any submittal to be in full compliance with all aspects of each section of this RFQ not noted above. The undersigned hereby declares that no person or party other than the undersigned has any interest whatsoever in this proposal, that it is without any connection or collusion with any person or persons making or having made any proposal for the same work and without any previous understanding with such person or persons as to relative prices, obviating competition, and that it is made in good faith.

CBRE
Company

Stephen Kulinski Managing Director
Representative Name/Title


[Signature]
Signature (blue ink)

HAMBLETON COUNTY GOVERNMENT
Request for Qualifications – Real Estate Agent Services Hambleton County Government (2022-01Q)

b) ANTI-COLLUSION STATEMENT

By signing this form the respondent agrees that he/she has not divulged to, discussed, or compared his/her submission with other respondents and has not colluded with any other respondent whatsoever. Note: no premiums, rebates or gratuities to any employee or agent are permitted with, prior to, or after any delivery of service. Any such violation will result in any contract related to this RFQ being null and void and could constitute a felony and result in a fine, imprisonment and civil damages.

The undersigned certifies that he/she has read, understands, and agrees to all terms, conditions, and requirements of this RFQ, and is authorized to enter into a contract with Hambleton County Government. This form must be signed personally by the respondent or the respondent's authorized agent. All signatures must be original and not photocopies.



Signature



Title



Printed Name



Date

By signing this form, the respondent signifies understanding and agreement with Hambleton County Government's Terms and Conditions.

HAMBLETON COUNTY GOVERNMENT
Request for Qualifications – Real Estate Agent Services Hamblen County Government (2022-02Q)

c) CERTIFICATION OF COMPLIANCE WITH IRAN DIVESTMENT ACT
Tenn. Code Ann. § 12-12-101 et seq.

Comes Stephen Kalkowski, for and on behalf of
(Printed name of Principal Officer of Company)

CBRE, (the "Company") and, after being duly
authorized by the Company so to do, makes oath that:

By submission of these qualifications, each respondent certifies, and in the case of a joint
submission each party certifies, under penalty of perjury, that to the best of their knowledge and
belief that each respondent is not on the list created pursuant to the Iran Divestment Act, Tenn.
Code Ann. § 12-12-106.

[Signature]
Signature

Managing Director
Title

30 March 2022
Date

VIII. RFQ SUBMISSION CHECKLIST:

- ☐ Submission is labeled on the outside of the envelope or in the subject line, if electronically submitted, 'Real Estate Agent Services for Hamblen County Government RFQ#2022-02Q, March 30, 2022 @ 2:00p.m. as instructed on pages 6 Section IV of this document
- ☐ Complete ORIGINAL signed and initialed RFQ packet and any addenda issued
- ☐ Statement of Qualifications Form (pages 9-12, Section VI of this document)
- ☐ Exceptions Form (page 13, Section VII.a. of this document)
- ☐ Anti-Collusion Statement Signed (page 14 Section VII.b. of this document)
- ☐ Certification of Compliance with Iran Divestment Act completed and signed (page 15 Section VII.c. of this document)
- ☐ Sample Contract
- ☐ Organizational Chart and Resumes as listed on page 10
- ☐ Copies of license(s) as listed on page 10

02

Statement of Qualifications

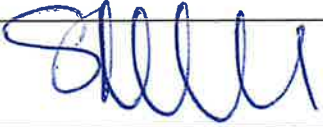


Section I: Company Introduction

HAMBLLEN COUNTY GOVERNMENT Request for Qualifications – Real Estate Agent Services Hamblen County Government (2022-02Q)

VI. STATEMENT OF QUALIFICATIONS:

If additional pages are needed to submit information, the page header should be marked with the corresponding Section number...i.e. Section I – Company Introduction.

Section I – Company Introduction (Not Scored):	
Company Legal Name:	CBRE, Inc.
Primary Point-of-Contact:	Brian Tapp
Email of Primary Point-of-Contact:	brian.tapp@cbre.com
Street Address:	4315 Kingston Pike, Suite 210 Knoxville, TN 37919
Telephone Number:	1 865 719 5703
Federal Tax ID #	95-2743174
Authorized Signature (blue ink):	
Date of Signature:	30 March 2022

Section II – Qualifications of the Firm and/or Team for this Project (30 Total Maximum Points):

NOTE: If additional pages are needed, Section II must be listed on each additional page.

Submit a copy of your real estate broker's license and the other certifications you have earned.

- a) The successful proposer must hold a real estate broker's license from the State of Tennessee.
- b) Other designations and certifications that are not required but preferred:
 - i. Certified Commercial Investment Member (CCIM)
 - ii. Certified Commercial Real Estate Advisor (CCREA)

The proposal must include an organizational chart identifying the team that will be assigned to the project and outlining the individual and/or group experience and abilities of that specific team. Submit resumes of key personnel that will be assigned to this project.

List the professional organizations of which you are a member.

See following pages



Section II: Qualifications of the Firm and/or Team for this Project

TN Verify Home

License Details	
License Status	Active
License #	296818
License ID	296818
Expiration Date	Jun 23 2022
Original Date	Feb 28 2005
Profession Code	2501
Profession Name	Real Estate Agent
First Name	BRIAN
Middle Name	HOWARD
Last Name	TAPP
City	NASHVILLE
State	TN
Zip Code	37201
Rank	Affiliate Broker
License Activity Description	Active

TN Verify Home

License Details	
License Status	Active
License #	287316
License ID	287316
Expiration Date	Aug 4 2023
Original Date	May 2 2003
Profession Code	2501
Profession Name	Real Estate Agent
First Name	JOHN
Middle Name	M.
Last Name	ADAMS
City	NASHVILLE
State	TN
Zip Code	37201
Rank	Real Estate Broker\Principal Brkr
License Activity Description	Active

TN Verify Home

License Details	
License Status	Active
License #	332873
License ID	332873
Expiration Date	Jun 28 2023
Original Date	Jun 29 2015
Profession Code	2501
Profession Name	Real Estate Agent
First Name	STEPHEN
Middle Name	EDWARD
Last Name	KULJINSKI
City	NASHVILLE
State	TN
Zip Code	37201
Rank	Affiliate Broker
License Activity Description	Active

Brian Tapp and John Adams both hold CCIM and SIOR certifications

Section II: Qualifications of the Firm and/or Team for this Project



Local Execution Team



Brian Tapp, CCIM, SIOR
First Vice President
CBRE Knoxville
*Primary Point of Contact



John Adams III, CCIM, SIOR
First Vice President
CBRE Knoxville

Public Sector Specialist



Lee Ann Korst
Southeast Regional Manager
CBRE Public Institutions & Education Solutions

Executive Oversight



Stephen Kulinski
Managing Director
CBRE Knoxville & Nashville

Platform Resources

Market Research

Property Marketing

Financial Consulting

Location Intelligence

Project Management

Valuation & Appraisal

Section II: Qualifications of the Firm and/or Team for this Project



Brian Tapp, CCIM, SIOR
First Vice President
CBRE Knoxville Advisory & Transaction Services

T +1 865 498 6500
M +1 865 719 5703
brian.tapp@cbre.com

Clients Represented

- Stock Creek Properties Partnership
- Phillips Infrastructure Holdings
- Norfolk Southern
- City of Maryville, TN
- Regal Entertainment Group

Pro Affiliations / Accreditations

- Certified Commercial Investment Member (CCIM), Designee
- Society of Industrial and Office Realtors Member (SIOR), Designee
- Knoxville Area Association of Realtors – Board of Directors – Director/Commercial Chapter Chair

Education

- Bachelors degree in Political Science from the University of Tennessee, Knoxville

Experience

Brian Tapp, CCIM, SIOR, is a First President at CBRE's Knoxville office. Brian brings over sixteen years of real estate experience in industrial sales and leasing, land assemblage for development, retail sales and leasing, tenant representation, corporate real estate services, and bank "other real estate owned" (OREO) dispositions.

Brian also serves a variety of non-profits and other organizations in various capacities, including acting as a board member for the Knoxville Chamber of Commerce, on the Government Relations Committee and Infrastructure Committee, and is an active member of the Blount Partnership. Other organizations include serving on the Executive Board of Directors for the following: Great Smoky Mountain Council for Boy Scouts of America; the City of Knoxville, Knoxville Knox County Planning Commission Public Stakeholder Advisory Committee, and United Way.

Significant Assignments

Client	Address	Type	Square footage
DDGC, LLC	3600 PAPERMILL DR, KNOXVILLE	SALE	60,344
BHS Corrugated	121 W. Centre Stage, Clinton	Sale and Lease	65,000
Durakon Industries	330 Carden Farm Dr. Clinton	Lease	86,800
Key Safety Systems	1644 Mustang Dr, Maryville	Sale	110,000
Triangle Business Park	1701 Triangle Park Dr, Maryville	Sale	123,456
Ceramaspeed	1991 McArthur Rd., Alcoa	Sale	140,260
ATCDT Corp	3015 E. Gov. John Sevier Hwy, Knoxville	Lease	171,650
City of Maryville	Robert C. Jackson Dr, Maryville	Sale	44.52 acres

Achievements

Brian has earned numerous prestigious commercial real estate awards, including East TN CCIM/Knoxville Business Journal's "Broker of the Year" award (2011 & 2012) and East TN CCIM/Knoxville Business Journal's "Deal of the Year" award in 2011 for his work in the disposition of Belle Island Village, known as "The Island in Pigeon Forge", a 280,000 sf festival themed development in Pigeon Forge, TN for Regions Bank. He won the "Deal of the Year" again in 2016 for his work on the acquisition of 1.9 acres assemblage on Cumberland Avenue at the University of Tennessee Knoxville Campus for Collegiate Development Group (CDG). CDG developed and built a \$45 million dollar, 140 unit, 268,254 square foot mixed-use community (student housing and retail space). Before beginning his practice in commercial real estate, Brian worked as a legislative aide to Congressman Van Hilleary and Congressman J. Randy Forbes in Washington, D.C.

Awards

- CoStar Power Broker Award – Top Industrial Leasing Broker 2021
- CoStar Power Broker Award – Top Industrial Leasing Broker 2020 Q4
- Avison Young Circle of Excellence – Affiliate Offices Award
- East TN CCIM/Knoxville Business Journal's "Broker of the Year" Award 2011, 2012
- East TN CCIM/Knoxville Business Journal's "Deal of the Year" Award 2011, 2016

Section II: Qualifications of the Firm and/or Team for this Project



John Adams, III, CCIM, SIOR
First Vice President
CBRE Knoxville Advisory &
Transaction Services

T: +1 865 498 5600
M +1 865 256 2719
E john.adams3@cbre.com

Clients Represented

- Geosyntec
- CRI
- Flagship Healthcare
- Dominion Development
- Lexington Trust

Experience

John M Adams III joins CBRE, a Knoxville native, joins CBRE as a First Vice President and is assisting in starting the CBRE office in Knoxville. His background is in office landlord and tenant representation and investment sales. Most recently, John was a Founding Member and Managing Broker at Avison Young and also was a Founding member and Managing Broker of Cushman & Wakefield Cornerstone in Knoxville, which later became Avison Young.

Significant Assignments

Client	Address	Type	Square footage
Stock Creek Properties	Hawks Landing & Base Point	Sale	193,000
Lexington Trust	Cherahala Blvd	Sale	59,748
Avant	Commerce Park Drive	Lease	35,100
Westminster Funds	E. Hill Ave	Sale	95,000
EPRI	Corridor Park Blvd	Lease	73,374

Achievements

Over the last 20 years, John has been involved in numerous transactions, most notably the East TN CCIM 2013 Deal of the year, when he sold the 1,000,000 sf vacant hospital for Baptist Hospital, which was later demolished for a mixed use development overlooking the Tennessee River and downtown Knoxville. In 2015 he was honored with the East TN CCIM Deal of the year by selling 100 acres to Tennova for a medical development. In 2016, 2017, & 2018 he was awarded the East TN CCIM Office Broker of the year.

Awards

- CoStar Power Broker Award – Top Office Leasing Broker 2021
- CoStar Power Broker Award – Top Sales Broker 2021
- SIOR Global Top 50 largest Office Transactions 2018 & 2020
- Avison Young Circle of Excellence – Affiliate offices Award 2019
- Knoxville Area Association of Realtors “Realtor of the Year” 2012
- Leadership Knoxville graduate 2012
- Knoxville’s “40 under 40” 2010.

Professional Affiliations and Education

- Society of Industrial and Office Realtors (SIOR) Designee
- Certified Commercial Investment Member (CCIM) Designee
- Bachelors Degree in Business and Finance from the Haslam College of Business at the University of Tennessee

Section II: Qualifications of the Firm and/or Team for this Project



Lee Ann Korst
Southeast Regional Manager
Senior Vice President
CBRE Public Institutions &
Education Solutions
T: +1 850 251 9319
leeann.korst@cbre.com

Clients Represented

- State of Tennessee
- City of Chattanooga
- State of South Carolina
 - AHCA – DOC
 - APD – DOE
 - CPIC – DOEA
 - DCF – DOR
 - DEP – DOS
 - DJJ – DOT
 - DMS – EOG
 - DOACS – FWC
 - DOAH – HSMV
- State of Florida
- City of Atlanta
- City of Bonita Springs, FL
- City of Cape Coral, FL
- City of Fort Myers, FL
- City of Hallandale Beach, FL
- City of Hollywood, FL
- City of Miami, FL
- City of Miami Beach, FL
- City of Orlando, FL
- City of Tallahassee, FL
- City of Ocala, FL
- Port Tampa Bay, FL
- Martin County, FL
- City of Mobile, AL
- Broward County, FL
- University of South Florida
- Commonwealth of Puerto Rico

Experience

Lee Ann Korst is Senior Vice President within the Public Institutions & Education Solutions (PIES) team and is responsible for the Southeast region government practice. She currently manages contracts for the States of Tennessee, South Carolina, and Florida, and the Cities of Miami, Miami Beach, Hollywood, Jacksonville, Fort Myers, and Broward County, among others. Ms. Korst has over 25 years of real estate experience.

Ms. Korst also has extensive government experience serving in high level positions at two Departments with the State of Florida. She served as the Director of Real Estate and Deputy Secretary at the Department of Management Services which included oversight and management of 7.9 MSF in the Florida Facilities Pool as well as 10 MSF of private sector leasing. Ms. Korst then served as the Deputy Executive Director, Department of Highway Safety and Motor Vehicles, with responsibility for direct management and oversight of the Division of Driver Licensing, Division of Motor Vehicles, Customer Service Center and Cabinet Affairs. She also served the Department of Highway Safety and Motor Vehicles as the Chief of Staff, a role that included overseeing administrative functions of that 4,500-employee state agency and \$280M budget.

Prior to her public service, Ms. Korst worked for Equity Office Properties for more than ten years, leasing and managing a variety of property types and ultimately serving as General Manager for One Ninety-One Peachtree Tower in Atlanta, Georgia, where she led the successful financial and operational performance of this 1.2 MSF Class A space.

Significant Assignments

- City of Chattanooga, TN – acquisitions
- State of Tennessee – lease acquisitions
- Dorchester County, SC – development advisory services
- Broward County, FL – broad services contract including acquisitions, leasing, dispositions, and development advisory services
- State of Florida – acquisitions, leasing, dispositions, consulting
- State of South Carolina – dispositions
- City of Fort Myers, FL – acquisition, development consulting

Professional Affiliations and Education

- Licensed Real Estate Sales Associate, State of Florida
- Master of Business Administration, Oglethorpe University
- Bachelor of Science in Management and Quantitative Methods, Illinois State University
- Harvard University - Strategic Negotiations: Deal Making for the Long Term



Stephen Kulinski
Managing Director
CBRE Nashville, Knoxville

T: +1 615 2481164
stephen.kulinski@cbre.com

Experience

Stephen Kulinski is Managing Director for CBRE's Tennessee Region which includes offices in Nashville, Memphis, Chattanooga and Knoxville. Mr. Kulinski adds to CBRE's ability to deliver our integrated services platform to local, national and global companies in the Nashville market. Mr. Kulinski's role is key in integrating CBRE's service lines to ensure the best team is in place to deliver results tailored to each client's specific needs.

Mr. Kulinski joined CBRE with more than 30 years of architectural experience, as well as an intimate understanding of the Nashville region. Mr. Kulinski came from Gresham, Smith and Partners, a leading design and consulting firm, where he served as Executive Vice President. There, he guided firm-wide marketing and business development efforts and provided leadership and direction for the practice.

Professional Affiliations & Accreditations

- Nashville Chamber of Commerce Board of Directors
- Nashville NAIOP Chapter President and Board Member
- ULI Nashville Board of Governance
- Frist Art Museum- Architectural Review Board
- Tennessee Chapter of CoreNet, President and Chapter Founder
- Nashville Downtown Rotary
- Williamson County CEO Organization
- USGBC Tennessee Leadership Advisory Board

Education

- University of North Florida, MBA in Economics
- University of Florida, Bachelor of Design, Architecture

Speaking Engagements

- IFMA "State of Real Estate 2016-2022"
- IREM "Annual Real Estate Forecast" 2021-2022

Professional Affiliations

CBRE actively participates in most professional real estate trade organizations and seminars to maintain our position as an industry leader, evaluate products, and share industry practices and keep our professionals well informed. Our professionals are active participants and hold local, regional, and national positions within the organizations. Our employees also frequently author white papers and lead panel discussions.

CBRE is a member of a number of organizations, including:

- Building Owners and Managers Association (BOMA)
- Building Owners and Managers Institute (BOMI)
- Business Roundtable
- Boston College Center for Corporate Citizenship (BCCCC) and its Professional Services Sustainability Roundtable (PSSR)
- Business in the Community (BITC)
- Center for Climate and Energy Solutions' Business Environmental Leadership Council (C2ES BELC)
- CoreNet
- Corporate Real Estate Women (CREW)
- Global Real Estate Sustainability Benchmark (GRESB)
- Global Reporting Initiative (GRI) GOLD Community
- Green Rating Alliance
- International Council of Shopping Centers (ICSC)
- NAIOP, the Commercial Real Estate Development Association
- Real Estate Roundtable
- U.S. Green Building Council (USGBC)

CBRE subscribes to and/or endorses a number of external initiatives, including:

- CDP
- Environmental Protection Agency (EPA) ENERGY STAR®
- Greenhouse Gas (GHG) Protocol
- International Organization for Standardization (ISO) 14001
- Leadership in Energy and Environmental Design (LEED)®
- Occupational Health and Safety Assessment Series (OHSAS) 18001
- Principles for Responsible Investment (PRI)
- Sustainability Accounting Standards Board (SASB)
- United Nations Global Compact (UNGC)
- United Nations Guiding Principles on Business and Human Rights
- WELL Building Standard (WELL)

Additional Affiliations

A more complete listing of CBRE's affiliations (corporate and individual) include the following organizations:

- American Energy Engineers
- American Institute of Architects
- American Institute of Certified Public Accountants
- American Real Estate Society
- American Society of Real Estate Counselors
- Appraisal Institute
- Appraisal Institute of Canada
- Association of Industrial Real Estate Brokers
- Australian Institute of Arbitrators
- Australian Property Institute
- Better Business Bureau
- Chamber of Commerce of the United States
- Chartered Institute of Arbitrators
- Commercial Investment Real Estate Institute
- Community Association Institute
- CoreNet Global
- Hong Kong Institute of Surveyors
- Incorporated Society of Valuers & Auctioneers
- Institute of Plant & Machinery Valuers
- Institute of Rating Revenues & Valuations
- Institute of Surveyors, Malaysia
- International Real Estate Federation
- International Real Estate Institute
- International Society of Land Economics
- Japan Association of Real Estate Appraisal
- Mortgage Bankers Association of America
- National Association of Real Estate Investment Trusts
- National Association of Realtors
- National Council of Architectural Registration Boards
- National Fire Protection Association
- National Institute of Real Estate Brokers
- National Network of Commercial Real Estate Women
- New Zealand Institute of Valuers
- Pension Real Estate Association
- Property & Land Economy Institute New Zealand
- Real Estate Institute
- Royal Institution of Chartered Surveyors
- Singapore Institute of Architects
- Singapore Institute of Planners
- Singapore Institute of Surveys & Valuers
- Society of Real Estate Appraisers
- South African Institute of Valuers
- Thai Valuers Association

HAMBLEN COUNTY GOVERNMENT

Request for Qualifications – Real Estate Agent Services Hamblen County Government (2022-02Q)

Section III – Experience with Similar Projects including reference comments from projects listed below.(40 Total Maximum Points):

List at least 5 clients you have represented during the last 5 years.

NOTE: If additional pages are needed, Section III must be listed on each additional page.

<u>Client #1</u>	<u>Client #2</u>
Business Name: City of Maryville	Business Name: BHS Corrugated-North America ,Inc.
Contact Name: Greg McClain	Contact Name: Bill Wantz
Email Address: gmcclain@maryville-tn.gov	Email Address: wwantz@bhs-world.com
Phone Number: (865) 273 3401	Phone Number: (865) 828 5702
<u>Client #3</u>	<u>Client #4</u>
Business Name: State of TN	Business Name: City of Fort Myers
Contact Name: Stacey Nelson	Contact Name: Steven Belden
Email Address: stacey.nelson@tn.gov	Email Address: sbelden@cityftmyers.com
Phone Number: (615) 917 2890	Phone Number: (239) 321 7902
<u>Client #5</u> Division of Administrative Services Business Name: Florida Dept. of Highway Safety and Motor Vehicles Contact Name: Kevin Bailey Email Address: KevinBailey@flhsmv.gov Phone Number: (850) 617 3400	List the percentage of your business over the past five (5) years that involved commercial property. <div style="text-align: center; font-size: 2em;">100%</div>



City of Maryville, TN

Land Planning & Disposition for Development

CBRE's John Adams and Brian Tapp were engaged to represent the City of Maryville in its efforts to maximize the value of its owned 80-acre business park outside of Knoxville. The City's initial requirement was to focus on retail development for Laurel Branch Business Park.

The team worked with the City to develop a land plan, dividing the property into retail, office, and other commercial lots. The team marketed the property nationally, regionally, and locally to generate maximum visibility and competition for the City.

Ultimately the final buyer for over half of the Laurel Branch Business Park was Amazon, which will build a +/- 250,000 square foot last-mile delivery facility on the property. The team also worked with the owner's representative, the City, civil engineer, traffic engineer, and buyer to develop off-site improvements.



CLIENT REFERENCE

Greg McClain, City of Maryville
1 865 273 3401

Centre Stage, Clinton, TN

Acquisition

- Tenant had their existing warehouse facility under contract and needed a new warehouse closer to their manufacturing facility in West Knoxville. We had been working with the tenant on another building, but we could not come to terms with the landlord. The industrial market was at a historic low vacancy rate of sub 2% creating a very competitive environment for tenants.
- While negotiating on the first choice, 121 W Centre Stage came on the market. We took the tenant to tour 121 W Centre Stage, and when the deal didn't work out on the first choice, we could quickly lease the subject facility.
- We helped our client evaluate multiple (but still limited) options in a short amount of time.



CLIENT REFERENCE

Bill Wantz, VP Operations
1 865 828 5702

Section III: Experience with Similar Projects

State of Tennessee Real Estate Asset Management (STREAM)

Various Real Estate Services

CBRE has provided a range of real estate services for STREAM since 2015 following competitive procurements:

- Design and implementation of Alternative Workplace Solutions (AWS) for the portfolio to increase operational efficiency, decrease portfolio square footage, equip teams with appropriate technology, provide additional training and onboarding for staff, and ensure success into a new age of workplace operations.
 - After a pilot period, AWS has been implemented by 17 of 23 State agencies allowing on average 30% reduction in square footage across the portfolio
- Tenant representation services for the State's leases in Middle and West Tennessee across 62 counties, covering over 2.2 MSF and the major metros of Memphis and Nashville. CBRE has partnered hand-in-hand with Department of General Services (DGS) to follow the State's lease process to completion for each assigned transaction, and has provided quality service and real estate expertise to deliver executed leases in a timely fashion.
 - CBRE has completed 24 transactions totalling \$1.8 million in term savings and a 12.3% reduction in footprint to the State.



"CBRE's work and efforts embodies precisely the outcomes and expectations we desire; we could not have a better partner!"

-STREAM



CLIENT REFERENCE

Stacey Nelson, Director of Leasing, Department of General Services | Real Estate and Asset Management
stacey.nelson@tn.gov | 1 615 917 2890

City of Fort Myers

In the course of the analysis, the Police Department emerged as a department in need of better operating facilities. The existing building was significantly crowded and lacked covered parking and sufficient evidence storage and processing facilities.

- In 2018, the City of Fort Myers engaged CBRE to prepare a strategic plan and assessment of the City's owned real estate to identify opportunities to solve occupancy challenges and use real estate most effectively for economic development.
- The City had identified a city-owned site that would accommodate the new PD headquarters but would require structured parking, driving the cost to an estimated \$36M.
- During the Strategic planning process, CBRE identified an alternate site comprised of 10 acres which would be suitable for adaptive reuse and had ample surface parking to accommodate the Department's fleet, impound lot and firing range.
- The result is an acquisition and estimated retrofit cost of less than \$20M instead of the previously anticipated \$36M for new construction.
- In addition, the location of the site is also a gateway to the Midtown district, which the City is seeking to redevelop into a commercial area. The Police Department will serve as an "anchor tenant" and catalyze growth in the area.



"Our officers are beyond excited at the thought of having enough space to carry out their law enforcement activities."

- Fort Myers Police Chief



CLIENT REFERENCE

Steven P. Belden
Community Development Director | City of Fort Myers
sbelden@cityftmyers.com | 1 239 321 7902

State of Florida Highway Patrol

In the spring of 2020, CBRE was engaged to represent the Department of Highway Safety and Motor Vehicles, Division of the Florida Highway Patrol (FHP). FHP was previously co-located with FDOT in an owned facility that was inadequate and no longer met their operational requirements; therefore, it needed to relocate. CBRE represented FHP in acquiring a new headquarters facility for Troop D in Orlando, FL.

- FHP had specific needs to ensure proximity to interstates and central to the Troop D geographical area. Additionally, given funding constraints, FHP required a facility that was “turnkey” ready to move in with Furniture, Fixtures, and Equipment (FF & E) included.. In this transaction, CBRE successfully facilitated decision-making and approvals between the buyer and two different state agencies (FHP and DEP, Division of State Lands) with a seller who is not accustomed to the protracted timeline and processes (e.g., two appraisals) required by the government entities.
- Despite those constraints, the CBRE identified three suitable options and negotiated the transaction terms.
- The Purchase and Sale agreement was executed and approved by the Governor and Cabinet in December 2020. The asking price of the preferred site was \$6.5 million. CBRE successfully reduced the price to \$5.2 million, including the FF & E, valued at approximately \$170,000. CBRE is proud to have assisted FHP in improving its mission-critical operations in Orlando.



CLIENT REFERENCE

Kevin Bailey, Director
Division of Administrative Services
Florida Dept. of Highway Safety and Motor Vehicles
2900 Apalachee Parkway
Tallahassee, FL 32399
kevinbailey@flhsmv.gov | 1 850 617 3400

Section IV: Business Methodology

HAMBLEN COUNTY GOVERNMENT

Request for Qualifications – Real Estate Agent Services Hamblen County Government (2022-02Q)

Section IV – Business Methodology (30 Total Maximum Points):

Describe your methodology used to determine whether a property meets the needs of your client and how the purchase/lease amount is negotiated.

See following pages

Certificate of Insurance (Not Scored)

Proposer is willing to provide a Certificate of Insurance with Hamblen County named as additional insured.

Agree

Do Not Agree

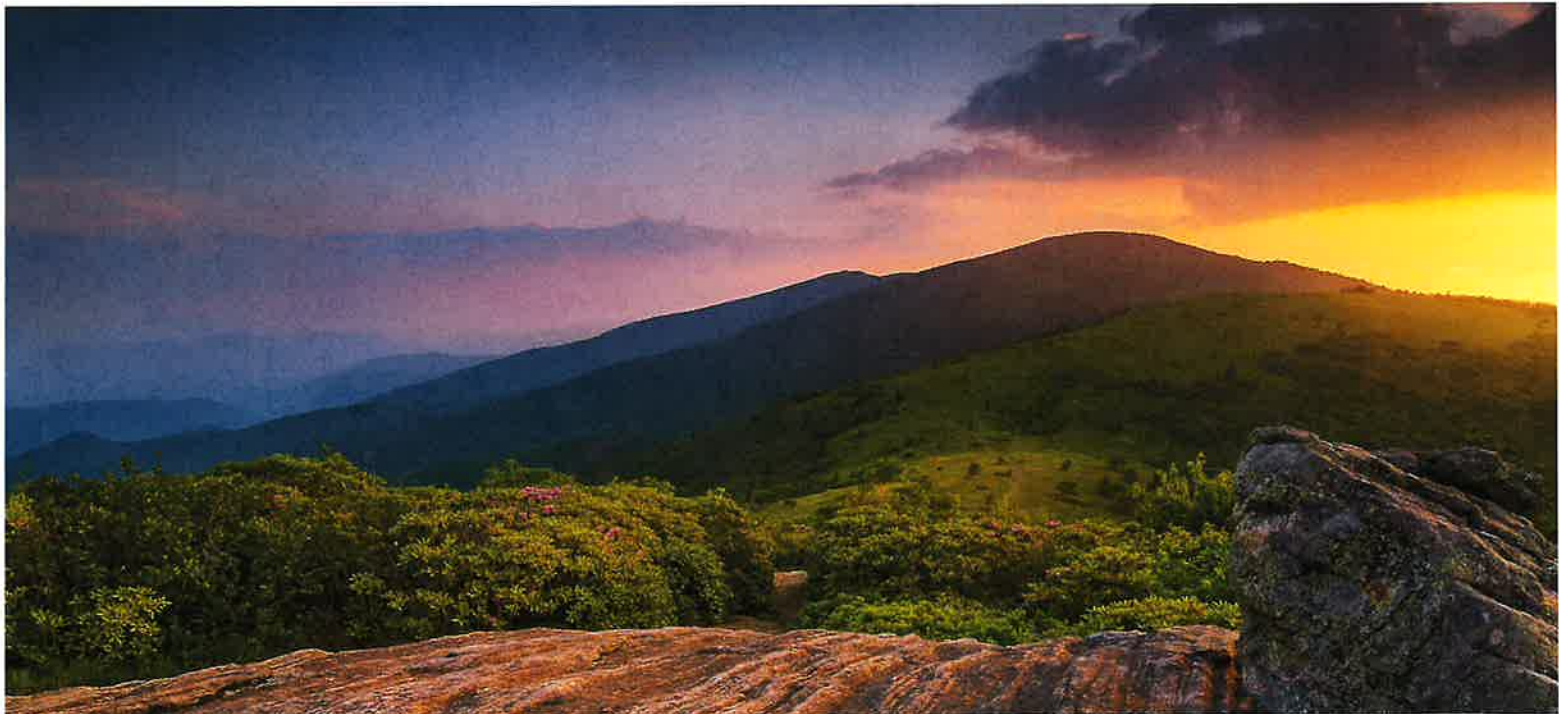


Acquisition services for government clients

CBRE provides a comprehensive approach to ensuring that properties meet our clients needs and that the purchase and /or lease amount is negotiated to ensure optimal value for the County.

Our overall approach includes the following steps:

- Review Hamblen County's desired goals for the project including ultimate purpose for acquiring property, site selection criteria, and any timing priorities or constraints
- Review Hamblen County's geographical search parameters
- Prepare a comprehensive market study of available properties (on and off-market), along with an interpretation and assessment of relevant market trends
- Recommend off-market opportunities for potential acquisition
- Conduct preliminary due diligence investigation of each potential property's suitability for the proposed use
- Analyze potential site plans and their corresponding feasibility for desired uses
- Confidentially contact property owners to confirm availability and pricing expectations on potential sites
- Assist the County in determining appropriate shortlist of candidate properties by preparing presentations comparing alternatives
- Develop offer strategy based on market activity and due diligence information received
- Prepare letter of intent substantiating the offer; manage counter-offer process if any and communicate with seller in accordance with jointly developed CBRE and County strategy
- Communicate with the seller on behalf of Hamblen County to obtain and review all necessary due diligence information, manage any notice periods and critical dates to the County's advantage, obtain any necessary 3rd party reports, and prepare to execute the purchase and sale agreement
- If any items arise during due diligence that may be of concern, work with the County to review them and suggest remedies such as cures by the seller, price reductions, or other measures
- Concurrently work on behalf of the County and with its legal counsel to prepare and negotiate the final purchase and sale agreement (PSA) that will govern the final sale following the due diligence period
- Assist in developing, communicating, negotiating, and presenting offers, counteroffers, and notices that relate to the offers and counteroffers until a purchase agreement is signed and all contingencies are satisfied or waived



GENERAL SCOPE OF WORK

We understand that our role will be to provide support to the Hamblen County's staff in analyzing, negotiating, and closing on the purchase of properties the County is interested in acquiring. To that end, CBRE will complete the below scope of work:

IDENTIFY AND QUALIFY POTENTIAL PROPERTY

We will begin our engagement by meeting with the County to discuss your desired goals in the acquisition process and to understand your site selection criteria.

Thoughtful strategy starts with the right questions.



Why are you looking to acquire property?



In **what parts of the County** are you interested in purchasing?



Do you have a **budget in mind**?



What do you **plan to do with the properties** once purchased?



Are you seeking **land, buildings, or both**?



How quickly do the transaction(s) need to be completed?



What **size property** are you looking for?



How many properties are you looking to buy?



Is **leasing property** an option?

Following our discussion and complete understanding of your priorities and needs, the team will begin by **preparing a comprehensive market study of available properties**. CBRE will identify available sites through a combination of on and off-market sources. For example, with our access to CoStar, and other listing services, CBRE will present a list of publicly for-sale properties for the County's consideration.

However, the real value of our brokerage professionals is in our ability to go beyond publicly listed sites and instead in our ability to probe our contacts and market intelligence for sites that may be unlisted or that are not yet on the market.

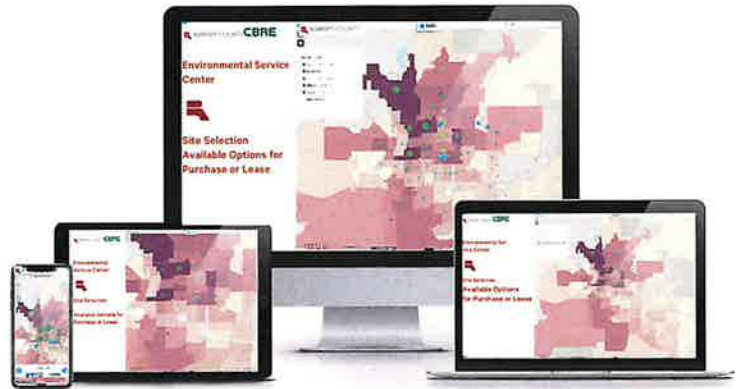
We are in the market every day, building relationships, scouting properties, and meeting owners, developers, and community members to ensure we have our fingers on the pulse of Hamblen County-area real estate. Brian Tapp and John Adams have built a network of relationships with property owners poised to sell. With this network at its fingertips, Hamblen County has a significant advantage in the market.

Section IV: Business Methodology

Following our gathering of information, CBRE will present the available options to the Hamblen County team and develop a preliminary shortlist for further due diligence.

Using CBRE's proprietary Dimension platform, we will prepare customized maps showing the properties, the relative advantages and disadvantages to their locations, and their interactivity with their locations such as proximity to major transit corridors, population centers, power infrastructure, etc.

With Dimension, Hamblen County can visualize the impact of potential acquisition decisions and more easily narrow down a short list of qualified properties with confidence and data on your side.



WE HARNESS THE POWER OF MAPS AND DEMOGRAPHICS TO VISUALLY UNDERSTAND A LOCATION AND ITS IMPACT ON YOUR STRATEGY

CONDUCT DUE DILIGENCE ON EACH PROPERTY

Following the shortlisting of sites of particular interest to Hamblen County, CBRE will **conduct due diligence investigation of each potential property suitability for the County's intended use.**

Below is a check list of the items that may be reviewed in preparation of purchase. These items may vary based on the nature of the asset (ie vacant land versus improved land, etc). CBRE will review them along with your primary experts (attorneys, consultants, inspectors, etc) and provide our opinion to the County on the impact to site value and negotiation strategy.

TITLE REPORT

- + land
- + improvements

SURVEY

- + zoning
- + utilities to the site
- + land area calculation
- + easements
- + covenants
- + conditions and restrictions

ENVIRONMENTAL ISSUES

- + Phase I reports
- + Phase II reports

BUILDING SPECIFICATIONS (IF APPLICABLE)

- + approximate areas and source and method of measurement
- + building footprint
- + site plan
- + exterior structure description
- + foundations/framing/windows
- + roofing/age
- + interior finishes
- + pending capital requirements
- + HVAC/electrical/emergency generators/lifesafety

PARKING

- + asphalt conditions report
- + total number of stalls
- + number of handicapped stalls
- + revenue from parking

THIRD PARTY CONTRACTS / AGREEMENTS

- + maintenance (elevators, roofs, HVAC etc.)

OPERATING INFORMATION

- + tenant leases (if any)
- + recent operating statements
- + annual budget

CONSULTANT REPORTS ON HAND (IF ANY)

- + mechanical
- + electrical
- + parking
- + roof
- + ADA

We understand that our role is to assist the County Mayor and the County Commission with the search for property for needs that may arise, support the negotiation of purchases or leases, and assist with the closing process.

Acquiring quality property at competitive prices is important to the County and its taxpayers and stakeholders. Throughout the process we will continually seek ways to maximize your value on the acquisition and find leverage points in the negotiation.

CBRE will create and maintain a competitive environment throughout the acquisition process. Creating anxiety among bidders by carefully controlling information (while complying with public sector requirements) is a key element of this process. We pride ourselves on running clean and defensible negotiations and transaction strategies that withstand scrutiny and public attention. The team will **solicit draft transaction documents from selected sellers**, analyze offers and counteroffers and provide like kind comparisons of seller terms to recommend the optimal path for the County.

CBRE will **assist the County with the purchase negotiation process** by:

- Recommending offer and counter-offer approaches based on market data and our knowledge of owner pain points and potential competing offers
- Recommending a shortlisting process that leverages seller anxiety about potentially losing an offer and maintains the County's information advantage
- Supporting the County's need for appraisals and any other statutory requirements

Our process incorporates information such as:

Owner Profile

Is the ownership an individual or institution? What is the ownership's financial capabilities and reputation?

Property Status

What amount of debt exists on the property, if any? What percentage of the facility is vacant and for how long? Does the owner have lease rollover exposure and/or deferred capital maintenance?

Market Conditions

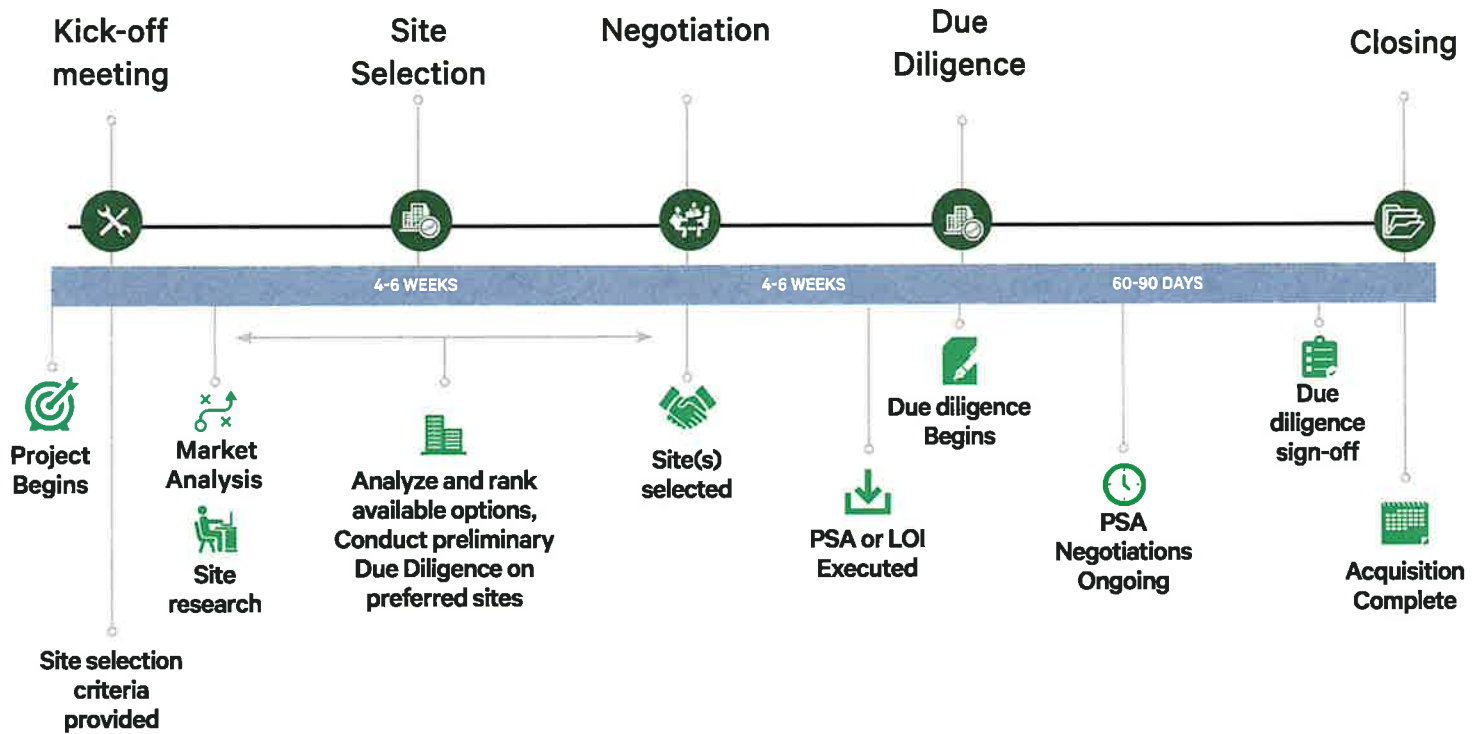
Do current conditions regarding absorption, asking prices, and cap rates favor buyers or sellers? Are there other active buyers whose requirements are competitive with the County's?

CBRE will work with the County's legal counsel to **prepare purchase agreements** that reflect the agreed upon terms. The team will also ensure that any issues that were uncovered during the due diligence period are reflected in purchase documents. In addition, we work side by side with our clients' counsel over working sessions, document reviews, and line by line comparisons to ensure the documents envision potential complications and provide a road map for each party. Our approach is to engage early and often to ensure our transaction documents comply with any of Hamblen County's statutory requirements and will withstand all scrutiny.

Finally, CBRE will be your complete partner throughout the closing process, **coordinating execution of all transaction documents**, partnering with the County's project team in Council meetings, staff communication, and other stakeholder management tasks at the direction and discretion of the County on an as-needed basis. This may include in-person participation, drafting presentations or other documents/materials, and/or other tasks to support the County in closing the best deal.

Section IV: Business Methodology

We anticipate the below workplan and timeline as a guide to our activities on this assignment, subject to refinement based on our consultations with the County.



Section IV: Business Methodology

Sample acquisitions recently completed by CBRE for government clients



Florida Highway Patrol

Acquisition of office building for Troop D Headquarters



City of Chattanooga, Tennessee

Multiple acquisitions for Fire Department expansion, and a facility for Homeless Housing and Services



City of Fort Myers, Florida

Acquisition of former newspaper printing site for conversion into police department headquarters



City of Miami, Florida

Acquisition of new headquarters facility and redevelopment of vacated site



City of Oxnard, California

Acquisition of 80-key hotel for conversion to affordable housing



Adams County, Colorado

Acquisition of 14 acres of vacant land for future parks, recreation, and open space uses.



Ramsey County, Minnesota

Acquisition of new site for use as environmental service center and hazardous waste recycling



Ebro, Florida

Purchase/sale of 630-acres in Washington County for the Pine Log State Forest expansion

03

Exception Forms



VII. FORMS:**a) EXCEPTIONS FORM**

Proposers shall note in the space provided below any exceptions or deviations in any way from the minimum standards of any section of this RFQ. Submissions should provide complete detail of exceptions or deviations.

Proposal Exceptions

<u>Item</u>	<u>Description of Exception</u>
N/A	N/A

By signing below, proposer acknowledges any submittal to be in full compliance with all aspects of each section of this RFQ not noted above. The undersigned hereby declares that no person or party other than the undersigned has any interest whatsoever in this proposal, that it is without any connection or collusion with any person or persons making or having made any proposal for the same work and without any previous understanding with such person or persons as to relative prices, obviating competition, and that it is made in good faith.

CBRE
Company

Stephen Kulinski Managing Director
Representative Name/Title

[Signature]
Signature (blue ink)

04

Anti-Collusion Statement

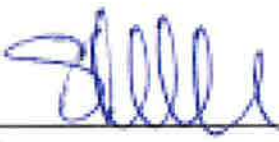


HAMBLETON COUNTY GOVERNMENT
Request for Qualifications – Real Estate Agent Services Hamblen County Government (2022-01Q)

b) ANTI-COLLUSION STATEMENT

By signing this form the respondent agrees that he/she has not divulged to, discussed, or compared his/her submission with other respondents and has not colluded with any other respondent whatsoever. Note: no premiums, rebates or gratuities to any employee or agent are permitted with, prior to, or after any delivery of service. Any such violation will result in any contract related to this RFQ being null and void and could constitute a felony and result in a fine, imprisonment and civil damages.

The undersigned certifies that he/she has read, understands, and agrees to all terms, conditions, and requirements of this RFQ, and is authorized to enter into a contract with Hamblen County Government. This form must be signed personally by the respondent or the respondent's authorized agent. All signatures must be original and not photocopies.



Signature



Title



Printed Name



Date

By signing this form, the respondent signifies understanding and agreement with Hamblen County Government's Terms and Conditions.

05

Certificate of Compliance with the Iran Divestment Act



HAMBLETON COUNTY GOVERNMENT
Request for Qualifications – Real Estate Agent Services Hamblen County Government (2022-02Q)

c) CERTIFICATION OF COMPLIANCE WITH IRAN DIVESTMENT ACT
Tenn. Code Ann. § 12-12-101 et seq.

Comes Stephen Kulinski for and on behalf of
(Printed name of Principal Officer of Company)
CBPE (the "Company") and, after being duly
authorized by the Company so to do, makes oath that:

By submission of these qualifications, each respondent certifies, and in the case of a joint
submission each party certifies, under penalty of perjury, that to the best of their knowledge and
belief that each respondent is not on the list created pursuant to the Iran Divestment Act, Tenn.
Code Ann. § 12-12-106.

[Signature]
Signature
Managing Director
Title
30 March 2022
Date

06

Sample Contract





[Insert Date field]

BY ELECTRONIC MAIL

[Insert Client Name field]

[Insert Address field 1]

[Insert Address field 2]

[Insert Address field 3]

Attention: [Insert Contact field]

Re: ***Exclusive Representation Agreement***

Dear _____:

Thank you for selecting CBRE, Inc. ("CBRE", "us", "we", "our") to represent [INSERT CLIENT NAME] ("you", "your") in connection with your interest in acquiring the real property described in Exhibit A, attached hereto (the "Requirement"). The terms of this engagement are contained in this agreement ("Agreement").

1. This Agreement shall terminate one year after the above date ("Term").
2. During the Term, you appoint us as your agent to exclusively represent you in fulfilling your Requirement, which may include a transaction at your current premises. If you acquire property, you agree we will remain your exclusive agent for your acquisition of any other space in the same building during the Term and for two years thereafter.
3. We will commit the appropriate number of qualified and licensed professionals to this engagement. Your "Rep Team" is comprised of _____. We will have the right to change members of the Rep Team as we deem necessary and appropriate. The Rep Team shall owe you duties of trust, confidence and loyalty.
4. We will research, present properties which may be suitable for your Requirement, negotiate on your behalf, analyze and advise on each offer and counteroffer, and work with you and your counsel to prepare purchase and sale or lease documents. However, it is your right to: (a) approve, modify, reject or disapprove any and all offers and counter-offers as well as any prospective properties or property owners and (b) adjust the terms and conditions of any offer made.
5. The success of this engagement relies, in part, on cooperation and communication between you and CBRE. Therefore, you agree to: (i) provide us with all available information to assist us in locating properties for your Requirement; (ii) immediately refer to us all inquiries or offers for your Requirement; and (iii) conduct all negotiations with prospective sellers, landlords or other relevant parties exclusively through us.
6. You and/or your legal counsel are solely responsible for determining the legal sufficiency of any documents to be executed by you in any transaction contemplated by this engagement as well as the tax consequences of any such transaction. You agree to investigate independently any property as to its value, present and future zoning and environmental matters affecting the property, its condition, and its suitability for your intended use. While we may assist you in gathering reasonably available information, we cannot represent or warrant the creditworthiness of any prospective landlord or seller or their ability to satisfy their obligations. All final business and legal decisions shall be made solely by you. Notwithstanding any designation of us as "agent" in this Agreement, we will have no right, power, or authority to enter into any agreement with any prospective property owner, real estate broker or any other person in the name of, on behalf of, or otherwise binding upon you.

7. CBRE will seek a commission from the property owner, seller, landlord, sublandlord or assignor of a leasehold interest (collectively as used in this agreement, "Owner"). We will use commercially reasonable efforts to obtain our commission only from the Owner. "Commercially reasonable efforts" does not mean we are required to sue the Owner. Further, you agree not to acquire any property unless and until the Owner (or its broker) agrees in writing to pay our commission in full in accordance with this Agreement; however, you agree that you will pay us any difference between the commission, if any, paid to us by the Owner, and the commission set forth as follows and/or in accordance with Exhibit B to this Agreement ("Commission Schedule").
8. We will earn a commission in accordance with this Agreement if either of the following occur:
- (a) during the Term you acquire any property or part of a property whether identified by us, you or anyone else; or
 - (b) within one hundred twenty (120) days after the expiration of the Term or after the Agreement otherwise terminates (the "Post Term"): (i) you acquire any property (or part thereof) regarding which we have either directly or indirectly negotiated on your behalf or any property we presented and submitted to you prior to the end of the Term (each a "Registered Property"); or (ii) you enter a contract to acquire any Registered Property, regardless of when you actually acquire it; or (iii) negotiations continue, resume, or commence leading to one of the foregoing events during the Post Term or thereafter. You agree that CBRE is authorized to continue negotiations with owners of Registered Properties, and we will submit to you a list of such Registered Properties within fifteen (15) business days following the expiration or termination of the Term; provided, however, that if you have submitted a written offer or proposal to acquire a property prior to said expiration or termination date, then it shall not be necessary to include that property on the list.

For purposes of this Agreement, "acquisition" or "acquire" means: (a) to lease, sublease or accept assignment of a leasehold interest in a property; (b) to purchase a property; (c) to make an exchange for a property; (d) to obtain an interest in an entity which has an ownership interest in a property in lieu of a purchase or lease thereof; (e) to obtain an option to purchase or lease a property; (f) to enter into a contract for a build to suit; and/or (g) to obtain a note or debt instrument secured by a property.

9. The members of the Rep Team are your agents to the exclusion of all of CBRE's other licensees. All other CBRE licensees shall be referred to as "Non-Rep Team Agents" and shall be considered "Cooperating Brokers." You acknowledge that we are an international brokerage firm and that we may represent owners of property that may be suitable for your consideration, and you hereby consent to our representation of such owners by Non-Rep Team Agents. You acknowledge that Non-Rep Team Agents owe duties of trust, confidence and loyalty exclusively to their clients. In the event a member of the Rep Team has a potential conflict of interest (such as proposing to act for the owner of a prospective property), then we will disclose such conflict to you and obtain your written consent to the conflict in advance of any negotiations with that property owner. The Rep Team and Non-Rep Team Agents shall not disclose the confidential information of one principal to the other.
10. While we are confident that this relationship will be mutually satisfactory, the parties agree to resolve any disputes subject to the following:
- (a) if either party institutes a legal proceeding against the other party relating to this Agreement, the prevailing party shall recover from the non-prevailing party all of its (i) reasonable attorneys' fees and costs, (ii) expert-related fees and costs and (iii) other related expenses. All past due amounts shall bear interest at twelve percent (12%) per

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TN

annum or the maximum rate permitted in the state in which the property is located. No party will be entitled to punitive, special and/or consequential damages, and each party waives all rights to and claims for relief other than for compensatory damages; and

(b) **EACH PARTY KNOWINGLY AGREES TO WAIVE ANY AND ALL RIGHTS TO HAVE A DISPUTE ON ANY MATTER RELATING TO, OR ARISING FROM THIS AGREEMENT DETERMINED BY A JURY.**

11. You and CBRE agree to comply with all applicable laws, regulations, codes, ordinances and administrative orders governing each party's respective participation in any transaction contemplated by this Agreement.
12. This Agreement is the entire agreement and supersedes all prior understandings between you and CBRE regarding this engagement. The Agreement is governed by the laws of the state where the property is located, without regard to its conflict of laws principles. This Agreement will be binding and inure to the benefit of your and CBRE's respective lawful representatives, heirs, successors, designees and assignees. It may not be altered or terminated except in a writing signed by both you and CBRE. Neither party's failure to exercise any of its rights under this Agreement will relieve the other party of its obligations hereunder. Nothing herein is or may be deemed a waiver or full statement of any of either party's respective rights or remedies, whether at law or in equity, all of which are expressly reserved. If any provision of this Agreement is unenforceable or void under applicable law, the remaining provisions will continue to be binding. This Agreement and the rights, interests or obligations created hereunder will not be assigned by either of the parties without the prior written consent of the other party. Each party agrees that each has participated equally in the negotiation and drafting of this Agreement. You acknowledge that the person signing this Agreement on your behalf has your full authority to execute it. This Agreement will be binding whether signatures are exchanged electronically or by hand, by mail, by fax, by electronic transfer or image, by photocopy or in counterparts.

Thank you again for this opportunity. We look forward to working with you.

Very truly yours,

CBRE, Inc.
Licensed Real Estate Broker

By: _____
Name: [INSERT: Contact name field]
Title: [INSERT: Contact title field]

AGREED:

[INSERT: Company field]

By: _____
Name: [INSERT: Contact name field]
Title: [INSERT: Contact title field]

EXHIBIT A -- Requirement

The real property in which you are interested may be generally described as follows:

- (a) General Type: _____

- (b) Approximate Size: _____

- (c) General Location: _____

- (d) Preferred Type of Transaction: _____

- (e) Price Range and General Terms: _____

- (f) Other Criteria: _____

EXHIBIT B – Commission Schedule

This Exhibit B shall apply to the extent that CBRE cannot collect the agreed upon commission from the Owner.

- A. *Lease.* Commissions shall be earned and payable upon lease execution, in accordance with the following rate:

The above rate is subject to the following provisions:

1. *Term of Less Than 1 Year:* If a lease term is less than 12 months, then the commission shall be prorated based upon the number of months included in the lease term.
 2. *Option or Right of First Refusal to Renew, Extend Lease or Occupy Additional Space:* If a lease for which a commission is earned and payable hereunder contains: (i) an option or right of first refusal to renew or extend and a lease term is renewed or extended, whether strictly in accordance with the terms of such option or right or otherwise and/or (ii) an option or right of first refusal to expand, and you occupy additional space whether strictly in accordance with the terms of such option or right or otherwise, then you shall pay a leasing commission in accordance with the provisions of this Commission Schedule on the additional leased space. Said commission shall be earned and payable upon execution of the documents renewing or extending occupancy or adding space, as applicable.
 3. *Purchase of Property by Tenant:* If a lease for which a commission is earned and payable hereunder contains an option, right of first refusal, or similar right for purchase of the property, and you, your successors or assignees, or any of your agents, officers, employees or shareholders purchase the property, whether strictly in accordance with the terms of such option, right of first refusal, similar right or otherwise during (a) the term of the lease, (b) any extension thereof, or (c) within ninety (90) days after the expiration thereof, then a sales commission shall be calculated and paid in accordance with the provisions of Section B below; provided, however, that there shall be a credit against such sales commission in the amount of lease commissions previously paid to CBRE relating to that portion of the purchaser's lease term which is canceled by reason of such sale. In no event shall such credit exceed the amount of such sales commission.
- B. *Purchase.* If you purchase property, CBRE's commission shall be ____ percent (____%) of the gross sales price. Gross sales price shall include any and all consideration received or receivable, in whatever form, including but not limited to assumption or release of existing liabilities. In the event this sale is in connection with a "build to suit" transaction, the commission shall be calculated on the gross sales price plus the gross construction cost of the building to be constructed on the property. The commission shall be earned and paid on the date title to the property is transferred to the purchaser; provided, however, that if the transaction involves an installment contract, then payment shall be made upon execution of such contract. If the owner is a partnership, corporation, or other business entity, and an interest in the partnership, corporation or other business entity is transferred, whether by merger, outright purchase or otherwise, in lieu of a purchase of a property, and applicable law does not prohibit the payment of a commission in connection with such sale or transfer, the commission shall be calculated on the fair market value of the property, rather than the gross sales price, multiplied by the percentage of interest so transferred, and shall be paid at the time of the transfer.



CBRE

Thank you

HAMBLÉN COUNTY GOVERNMENT
Request for Qualifications – Real Estate Agent Services Hamblen County Government (2022-02Q)

REQUEST FOR QUALIFICATIONS

Office of the Hamblen County Mayor
511 West Second North Street
Morristown, TN 37814

RFQ TIMELINE: Times listed below are in Eastern Standard Time.

Date Issued:	Tuesday, March 8, 2022
RFQ Title:	Real Estate Agent Services for Hamblen County Government (2022-02Q)
RFQ Question Deadline:	Friday, March 18, 2022 @ 2:00p.m. <i>All correspondence and communication must be via email to the designated Hamblen County project administrator listed on page 3. Questions submitted by telephone call will <u>not</u> be answered. Questions submitted after this deadline will <u>not</u> be answered.</i>
RFQ Answer Deadline:	Tuesday, March 22, 2022 @ 4:00p.m.
RFQ Submission Deadline Date & Time:	Wednesday, March 30, 2022 @ 2:00p.m. <i>If the Hamblen County Courthouse is closed for business at the time scheduled for proposal opening, for whatever reason, proposals will be accepted and opened on the next business day of the County, at the originally scheduled hour.</i>
Presentations/Interviews:	TBA
RFQ Submission Opening Location:	Hamblen County Courthouse, West Wing Conference Room, 1 st Floor, Administrative Building



HAMBLÉN COUNTY GOVERNMENT
Request for Qualifications – Real Estate Agent Services Hamblen County Government (2022-02Q)

INTRODUCTION:

Hamblen County Government (hereafter referred to as “County”) is requesting qualifications for licensed real estate agents to provide specified professional services for anticipated real estate transactions during the next two (2) years.

This document is a Request for Qualifications. It differs from a Request for Bid or Proposal in that the County is seeking the most qualified respondent. Submissions will be evaluated in accordance with the requirements stated in this solicitation and any addenda issued. The County, upon review of the received submissions, *may* request and schedule respondents to make a presentation so as to obtain additional information and/or clarification of their submission. Once the review process is finished, the company with the highest score will be determined to be the most qualified and contract negotiations will begin at that point. In the event that a contract cannot be negotiated with the top ranked respondent, the County reserves the right to negotiate with the next qualified respondent and so forth until a contract can be secured.

TABLE OF CONTENTS:

- I. Project Overview
- II. General Information
- III. Scope of Work
- IV. Submission Requirements
- V. Award Criteria Explanation and Points
- VI. Statement of Qualifications
- VII. Forms:
 - a. Exceptions Form
 - b. Anti-Collusion Statement
 - c. Certificate of Compliance Iran Divestment Act
- VIII. Proposal Submission Checklist

HAMBLLEN COUNTY GOVERNMENT
Request for Qualifications – Real Estate Agent Services Hamblen County Government (2022-02Q)

I. PROJECT OVERVIEW:

The County is currently looking for a qualified real estate agent for specified professional services for anticipated real estate transactions as listed in the scope of services for two (2) consecutive years beginning May 1, 2022 with an option to renew two (2), 1-year extensions.

II. GENERAL INFORMATION:

Project Administrator:

The County Finance Department is the sole point-of-contact for this procurement. All communication between prospective proposers and the County upon receipt of this RFQ shall be in email form to the County Finance Department as follows:

Johnna Harrell
511 West Second North Street
Morristown, TN 37814
Telephone: 423-586-1931
Email: Johnna.harrell@co.hamblen.tn.us

Any other communication will be considered unofficial and non-binding on the County. Communication directed to parties other than the County Finance Department may result in disqualification of the prospective proposer.

RFQ Questions and Answers:

Questions regarding this RFQ will be accepted via email to the Project Administrator until 2:00p.m. Friday, March 18, 2022. Questions submitted by telephone call will not be answered. Questions submitted after this deadline will not be answered.

Questions *and* Answers will be produced in writing and submitted to all prospective respondents known to the County and will be listed on the Hamblen County Government website, www.hamblencountyttn.gov, under the Bids & Proposals Tab no later than 4:00p.m. Tuesday, March 22, 2022.

Proprietary Information and Public Disclosure:

Materials submitted in response to this competitive procurement shall become the property of Hamblen County. All submissions shall remain sealed until the deadline for submissions has expired. Once qualifications are submitted to Hamblen County Government and opened, it constitutes a public record and is subject to the open records request pursuant to the Tennessee Open Records Act.

HAMBLLEN COUNTY GOVERNMENT
Request for Qualifications – Real Estate Agent Services Hamblen County Government (2022-02Q)

Cost of Proposal Submission:

The County will not be liable for any costs incurred by any respondent in preparation of a response to this RFQ, in conducting of a presentation, or any other activities related to responding to this RFQ.

Revisions to the RFQ:

In the event it becomes necessary to revise any part of this RFQ, addenda will be produced in writing and submitted to all prospective respondents known to the County and will be listed on the Hamblen County website, www.hamblencountyttn.gov, under the Bids and Proposals Tab. All addenda issued are required to be signed and submitted with the proposal. Failure to submit signed addenda will result in the proposal being deemed nonresponsive and may be disqualified from review.

The County reserves the right to cancel or to reissue this RFQ in whole or in part prior to the execution of a contract.

Period of Performance:

The period of performance of any contract resulting from this RFQ is tentatively scheduled to begin on May 1, 2022 and remain effective for two (2) consecutive years with the option to renew two (2), 1-year extensions.

Contract Terms:

All contracts between parties as a result of this RFQ shall be governed by and enforced in accordance with the laws of the State of Tennessee. In the event a dispute arises, the venue shall be in Hamblen County, Tennessee. The County shall require the person with authority to bind the company to sign all agreement(s) with the County.

Contract Termination:

The County reserves the right to cancel the contract at any time for breach of contractual obligations without penalty or recourse by giving the successful firm a written notice of such termination of at least thirty (30) calendar days prior to said cancellation. Prior to issuing such a notice, the County will, if appropriate, provide the successful firm with an opportunity to cure the breach within a reasonable period of time. Should the County exercise its right to terminate the contract for such reasons, the termination shall become effective on the date as specified in the notice of termination sent to the successful firm. The successful firm shall be entitled to receive just and equitable compensation for the work provided pursuant to the contract prior to the effective date of cancellation.

HAMBLÉN COUNTY GOVERNMENT
Request for Qualifications – Real Estate Agent Services Hamblen County Government (2022-02Q)

No Obligation:

The County reserves the right to accept or reject any or all submissions at its sole discretion without penalty and to not issue a contract as a result of this RFQ. The County also has the right to waive any formal defects in submissions when deemed in the best interest of the County. Further, the County reserves the right to negotiate with any respondent concerning matters which the County determines require clarification or changes not in conformity with the specific requirements set forth herein.

Right To Withdraw:

Respondents have the right to request withdrawal of their submissions from consideration due to error by giving notice at any time before and not later than two (2) days after submissions are publicly opened.

Commitment of Funds:

The Hamblen County Legislative Body are the only individuals who may legally commit the County to the expenditures of funds for a contract resulting from this RFQ. No cost chargeable to the proposed contract may be incurred before receipt of a fully executed contract. Obligations on contracts that envision extended funding through successive fiscal periods shall be contingent upon actual appropriations for the following years.

III. SCOPE OF WORK:

- Assist the County Mayor and the County Commission with the search for property for needs that may arise;
- Assist the County Mayor and the County Commission with the negotiation for the purchase and/or lease of identified property;
- Assist the County Mayor and the County Commission with the process of closing the purchase of identified property;
- The term of the contract will be two (2) consecutive years beginning May 1, 2022 with the option to renew two (2), 1-year extensions;
- The County and successful firm awarded the contract will enter into a mutual contract and this RFQ will become part of the contract. Include the company's sample contract with your proposal for Hamblen County's consideration. The County reserves the right to negotiate terms and conditions of any contract with the proposed vendor.



HAMBLÉN COUNTY GOVERNMENT
Request for Qualifications – Real Estate Agent Services Hamblén County Government (2022-02Q)

IV. SUBMISSION REQUIREMENTS:

Respondents are required to submit one (1) complete packet either electronically or in a sealed envelope based on the instructions below. Qualifications, whether mailed, hand-delivered, or electronically submitted must arrive no later than 2:00p.m. Eastern Standard Time on Wednesday, March 30, 2022.

Instructions for Submitting Qualifications Electronically:

Electronic submissions should be sent to Johnna.harrell@co.hamblen.tn.us via WeTransfer.com, an internet-based computer file transfer service. The message line of the WeTransfer page must state: **REAL ESTATE AGENT SERVICES for HAMBLÉN COUNTY GOVERNMENT RFQ#2022-02Q, WEDNESDAY, MARCH 30, 2022 @ 2:00P.M.** Please note: Qualifications should be submitted no earlier than March 23, 2022 as the documents are only available for download for seven (7) days and we cannot access them for any reason prior to Wednesday, March 30, 2022 @ 2:00p.m.

Instructions for Submitting Hard Copies of Qualifications:

Envelopes **must** arrive **sealed** and clearly **marked** with **REAL ESTATE AGENT SERVICES for HAMBLÉN COUNTY GOVERNMENT RFQ#2022-02Q, MARCH 30, 2022 @ 2:00P.M.** on the outside of the envelope to the Hamblén County Mayor's Office, 511 West Second North Street, Morristown, TN 37814, Attention: Johnna Harrell.

Respondents assume the risk for the method of delivery chosen. The County assumes no responsibility for delays caused by any delivery service whether in-person or electronically. Late proposals will not be accepted.

Proposal Content:

All items listed below must be included in your submission. Failure to submit any of these documents will result in your submission being considered nonresponsive and therefore, may be disqualified from review.

1. Complete Original Signed & Initialed RFQ Packet & Any Addenda Issued
2. Statement of Qualifications (attached)
3. Exceptions Form (attached)
4. Anti-Collusion Statement (attached)
5. Certificate of Compliance with Iran Divestment Act (attached)
6. Sample Contract



HAMBLEN COUNTY GOVERNMENT
Request for Qualifications – Real Estate Agent Services Hamblen County Government (2022-02Q)

Statement of Qualifications:

The respondent must complete the Statement of Qualifications on pages 9-12 of this RFQ. If additional pages are needed to complete a section, the section number **must** be listed on the page header.

Exceptions Form:

If a bidder **has** exceptions to the scope of services listed in this document, they must be listed on the exceptions form on page 13 of this document.

Anti-Collusion Statement:

The respondent certifies by signing the anti-collusion statement on page 14 of this RFQ that this submission is made without prior understanding, agreement, or accord with any other person submitting qualifications for the same service and that this submission is in all respects bona fide, fair and not the result of any act of fraud or collusion with another person engaged in the same line of business or commerce.

Iran Divestment Act:

The respondent must certify on page 15 of this RFQ that neither they nor any of their successors, parent companies, subsidiaries or companies under common ownership or control certifies, under penalty of perjury, that to the best of their knowledge and belief that they are not on the list created pursuant to Tennessee Code Annotated § 12-12-106.

Signatures:

The Statement of Qualifications, Exceptions Form, Anti-Collusion Statement, Certification of Compliance with the Iran Divestment Act, and all RFQ Amendments must be signed and dated by a person authorized to legally bind the respondent to a contractual relationship.

Presentations/Interviews:

The County, upon review of the received qualification submissions, **may** request and schedule a presentation for the respondents with the top three scores so as to obtain additional information and/or clarification of the submission.

Presentations/Interviews will be structured oral presentations for the top three highest scores. Presenters will be allowed 10 minutes to discuss their qualifications followed by a 20-minute Q&A session with the Finance Committee. The date, time and room location is to be announced.

HAMBLLEN COUNTY GOVERNMENT
Request for Qualifications – Real Estate Agent Services Hamblen County Government (2022-02Q)

V. AWARD CRITERIA EXPLANATION AND POINTS:

Evaluations will be based on the information submitted on the Statement of Qualifications Form (pages 9-12). An explanation of the information being requested is listed in each section along with the corresponding maximum number of points that can be awarded. Proposals will be accepted until 2:00p.m., Wednesday, March 30, 2022. The proposals will then be given to the Hamblen County's Finance Committee. The Finance Committee will evaluate and score the responses. The top three scores may be asked to make a presentation to the Finance Committee. The Finance Committee will make a recommendation to the full county commission for consideration of the contract award.

Evaluation Criteria Overview	
Criteria	Maximum Number of Points Available
Statement of Qualifications <ul style="list-style-type: none">• Professional Certifications• Experience with Commercial Real Estate	30
Business Methodology <ul style="list-style-type: none">• Demonstrate how the proposer meets the needs of its clients	30
List of Completed Projects <ul style="list-style-type: none">• A summary of the firms' relevant experience during the past five (5) years• Client Reference Feedback	40
TOTAL Points Available:	100

HAMBLEN COUNTY GOVERNMENT
Request for Qualifications – Real Estate Agent Services Hamblen County Government (2022-02Q)

VI. STATEMENT OF QUALIFICATIONS:

If additional pages are needed to submit information, the page header should be marked with the corresponding Section number...i.e. Section I – Company Introduction.

Section I – Company Introduction (Not Scored):	
Company Legal Name:	LeBel Commercial Realty, LLC
Primary Point-of-Contact:	Paul LeBel
Email of Primary Point-of-Contact:	paul@lebelcommercial.com
Street Address:	218 S Cumberland St Morristown, TN 37813
Telephone Number:	423-307-1429
Federal Tax ID #	20-8129349
Authorized Signature (blue ink):	
Date of Signature:	3/24/22

Section II – Qualifications of the Firm and/or Team for this Project (30 Total Maximum Points):

NOTE: If additional pages are needed, Section II must be listed on each additional page.

Submit a copy of your real estate broker's license and the other certifications you have earned.

- a) The successful proposer must hold a real estate broker's license from the State of Tennessee.
- b) Other designations and certifications that are not required but preferred:
 - i. Certified Commercial Investment Member (CCIM)
 - ii. Certified Commercial Real Estate Advisor (CCREA)

The proposal must include an organizational chart identifying the team that will be assigned to the project and outlining the individual and/or group experience and abilities of that specific team. Submit resumes of key personnel that will be assigned to this project.

List the professional organizations of which you are a member.

See attached.



HAMBLÉN COUNTY GOVERNMENT
Request for Qualifications – Real Estate Agent Services Hamblen County Government (2022-02Q)

Section III – Experience with Similar Projects including reference comments from projects listed below.(40 Total Maximum Points):

List at least 5 clients you have represented during the last 5 years.

NOTE: If additional pages are needed, Section III must be listed on each additional page.
See attached.

<u>Client #1</u> Business Name: Contact Name: Email Address: Phone Number:	<u>Client #2</u> Business Name: Contact Name: Email Address: Phone Number:
<u>Client #3</u> Business Name: Contact Name: Email Address: Phone Number:	<u>Client #4</u> Business Name: Contact Name: Email Address: Phone Number:
<u>Client #5</u> Business Name: Contact Name: Email Address: Phone Number:	List the percentage of your business over the past five (5) years that involved commercial property.



HAMBLLEN COUNTY GOVERNMENT
Request for Qualifications – Real Estate Agent Services Hamblen County Government (2022-02Q)

Section IV – Business Methodology (30 Total Maximum Points):

Describe your methodology used to determine whether a property meets the needs of your client and how the purchase/lease amount is negotiated.

Once the County determines their needs, whether it is additional property around the jail or the relocation of the Health Department, we would proceed to identify properties that meet those parameters. It is crucial that the County be able to provide detailed requirements and budgetary constraints to assist the Brokers with appropriate site selection.

Once potential sites are identified, Brokers will provide County with a cost comparison between sites, this will include an evaluation of comparable sites that have been sold or leased. Broker will make a recommendation to the County, so the County can make an offer.

Certificate of Insurance (Not Scored)

	Agree	Do Not Agree
Proposer is willing to provide a Certificate of Insurance with Hamblen County named as additional insured.	X	



HAMBLLEN COUNTY GOVERNMENT
Request for Qualifications – Real Estate Agent Services Hamblen County Government (2022-02Q)

VII. FORMS:

a) EXCEPTIONS FORM

Proposers shall note in the space provided below any exceptions or deviations in any way from the minimum standards of any section of this RFQ. Submissions should provide complete detail of exceptions or deviations.

Proposal Exceptions

<u>Item</u>	<u>Description of Exception</u>
<hr/>	<hr/>
<hr/>	<hr/>
<hr/>	<hr/>
<hr/>	<hr/>
<hr/>	<hr/>

By signing below, proposer acknowledges any submittal to be in full compliance with all aspects of each section of this RFQ not noted above. The undersigned hereby declares that no person or party other than the undersigned has any interest whatsoever in this proposal, that it is without any connection or collusion with any person or persons making or having made any proposal for the same work and without any previous understanding with such person or persons as to relative prices, obviating competition, and that it is made in good faith.

LeBel Commercial Realty, LLC
Company

Paul LeBel, owner
Representative Name/Title


Signature (blue ink)

HAMBLEN COUNTY GOVERNMENT
Request for Qualifications – Real Estate Agent Services Hamblen County Government (2022-02Q)

b) ANTI-COLLUSION STATEMENT

By signing this form the respondent agrees that he/she has not divulged to, discussed, or compared his/her submission with other respondents and has not colluded with any other respondent whatsoever. Note: no premiums, rebates or gratuities to any employee or agent are permitted with, prior to, or after any delivery of service. Any such violation will result in any contract related to this RFQ being null and void and could constitute a felony and result in a fine, imprisonment and civil damages.

The undersigned certifies that he/she has read, understands, and agrees to all terms, conditions, and requirements of this RFQ, and is authorized to enter into a contract with Hamblen County Government. This form must be signed personally by the respondent or the respondent's authorized agent. All signatures must be original and not photocopies.



Signature

owner

Title

Paul LeBel

Printed Name

3/24/22

Date

By signing this form, the respondent signifies understanding and agreement with Hamblen County Government's Terms and Conditions.

HAMBLEN COUNTY GOVERNMENT
Request for Qualifications – Real Estate Agent Services Hamblen County Government (2022-02Q)

c) **CERTIFICATION OF COMPLIANCE WITH IRAN DIVESTMENT ACT**
Tenn. Code Ann. § 12-12-101 et seq.

Comes Paul LeBel, for and on behalf of
(Printed name of Principal Officer of Company)

LeBel Commercial Realty, LLC, (the “Company”) and, after being duly
authorized by the Company so to do, makes oath that:

By submission of these qualifications, each respondent certifies, and in the case of a joint
submission each party certifies, under penalty of perjury, that to the best of their knowledge and
belief that each respondent is not on the list created pursuant to the Iran Divestment Act, Tenn.
Code Ann. § 12-12-106.


Signature

owner
Title

3/24/22
Date

VIII. RFQ SUBMISSION CHECKLIST:

- ☒ Submission is labeled on the outside of the envelope or in the subject line, if electronically submitted, 'Real Estate Agent Services for Hamblen County Government RFQ#2022-02Q, March 30, 2022 @ 2:00p.m.' as instructed on pages 6 Section IV of this document
- ☒ Complete ORIGINAL signed and initialed RFQ packet and any addenda issued
- ☒ Statement of Qualifications Form (pages 9-12, Section VI of this document)
- ☒ Exceptions Form (page 13, Section VII.a. of this document)
- ☒ Anti-Collusion Statement Signed (page 14 Section VII.b. of this document)
- ☒ Certification of Compliance with Iran Divestment Act completed and signed (page 15 Section VII.c. of this document)
- ☒ Sample Contract
- ☒ Organizational Chart and Resumes as listed on page 10
- ☒ Copies of license(s) as listed on page 10



Section II
Statement of Qualifications:

1.
 - a. Real Estate Brokers license attached
 - b. CCIM certificate attached

2. Key Personnel

- a. Paul LeBel, CCIM, Real Estate Broker, resume attached
- b. Will Sliger, Real Estate Broker, resume attached

The primary contact will be Paul LeBel. Brokers will work together to facilitate the County's needs. Under certain circumstances, Brokers can have a conflict in the representation of two parties. If this arises, Brokers will disclose this conflict and assign a Broker to each party.

3. 218 S. Cumberland St.
Morristown, TN 37813

4. Professional Organizations:

- a. Certified Commercial Investment Member, CCIM
- b. National Association of Realtors
- c. Tennessee Association of Realtors
- d. Lakeway Area Association of Realtors
- e. Knoxville Area Association of Realtors

5. 100% of my business, over the last 5-years, has been Commercial Real Estate.

Section II

Paul M. LeBel, CCIM

218 S. Cumberland St.

Morristown, TN 37813

Office: (423) 307-1429 Fax: (423) 307-1524

E-mail: paul@lebelcommercial.com

Occupation:

2007 – Present	LeBel Commercial Realty, Owner
2000 – 2006	Johnson, Sams & LeBel Commercial Realty, Partner
1996 – 2000	JHL Associates, Commercial Real Estate, Partner

Professional Affiliations:

2003 – Present	CCIM – Certified Commercial Investment Member
2000 – 2019	North Carolina Real Estate Broker's License
1998 – Present	Morristown Area Chamber of Commerce
1998 – Present	Tennessee Real Estate Broker's License
1997 – Present	Million-Dollar Club
1995 – Present	National Association of Realtors
1995 – Present	Tennessee Association of Realtors
1995 – Present	Lakeway Area Association of Realtors

Committees:

2020-present	Lakeway Area Association of Realtors, Treasurer
2011 – 2015	Morristown City Council
2008 – 2012	Morristown Area Chamber of Commerce, Board of Directors
2008 – 2012	Morristown Area Chamber of Commerce, Vice-chairman of Economic Development
2009	Lakeway Area Association of Realtors, Chairman
2008	Lakeway Area Association of Realtors, President
2006 – 2014	Hamblen County Commissioner, District 1
2004 – 2006	East Tennessee Human Resource Agency (ETHRA) Policy Council, Development Representative
2004 – 2006	East Tennessee Development District (ETDD), Development Representative
2003 – 2005	Morristown Area Chamber of Commerce, Retail and Commercial Development Committee, Chairman
2002 – 2007	Morristown Area Chamber of Commerce, Industrial Relations Committee
2002 – 2004	Morristown Association of Realtors, Board of Directors
2001	Morristown Association of Realtors, Grievance Committee, Chairman

Education/Certification:

1994	University of Tennessee, BS (Microbiology)
2003	CCIM – Certified Commercial Investment Member

Awards:

2009	Lakeway Area Association of Realtors – President's Award
2006	Lakeway Area Association of Realtors – Realtor of the Year
2005	Lakeway Area Association of Realtors – President's Award

State of Tennessee

12168935

TENNESSEE REAL ESTATE COMMISSION

REAL ESTATE BROKER

PAUL M. LEBEL

PRINCIPAL BROKER

This is to certify that all requirements of the State of Tennessee have been met.

ID NUMBER: 258082

LIC STATUS: ACTIVE

EXPIRATION DATE: August 21, 2022



IN-1313

DEPARTMENT OF
COMMERCE AND INSURANCE

Section II
Will Sliger, Broker
218 S. Cumberland St.
Morristown, TN 37813
Office: (423) 307-1429 Fax: (423) 307-1524
E-mail: will@lebelcommercial.com

Occupation:

2010-Present LeBel Commercial Realty
2007-2007 Re/Max Real Estate Ten

Professional Affiliations:

2016-Present Tennessee Real Estate Broker's License
2010-Present Morristown Area Chamber of Commerce
2010-Present International Council of Shopping Centers
2010-Present Million-Dollar Club
2008-Present National Association of Realtors
2008-Present Tennessee Association of Realtors
2008-Present Lakeway Area Association of Realtors

Committees:

2022 National Association of Realtors Safety Advisory Committee
2021-Present Tennessee Realtors Division 3 Vice President
2019-2020 Tennessee Realtors Commercial Forms Vice Chair
2019-2020 Tennessee Realtors Commercial Forum
2019 Tennessee Realtors Budget and Finance
2016-2019 Lakeway Area Association of Realtors, Board Member & Officer
2016-2019 Morristown Area Chamber of Commerce, Retail and Commercial
Development Committee, Chairman
2010-Present Hamblen County Construction Board of Appeals
2015-2015 Lakeway Area Association of Realtors, Board Member
2013-2013 Lakeway Area Association of Realtors, Grievance Committee
2012-2014 Rose Center Board of Directors
2010-2012 Morristown Area Chamber of Commerce, Retail and Commercial
Development Committee
2010-2012 Morristown Area Chamber of Commerce, Industrial Relations Committee
2010-2011 Morristown Area Chamber of Commerce, Retail and Commercial
Development Chairman

Education/Certification:

2012 Tusculum College, BS Management

State of Tennessee

12843250

TENNESSEE REAL ESTATE COMMISSION
REAL ESTATE BROKER
WILL CURTIS SLIGER

This is to certify that all requirements of the State of Tennessee have been met.

ID NUMBER: 316105
LIC STATUS: ACTIVE
EXPIRATION DATE: January 12, 2024



IN-1313
DEPARTMENT OF
COMMERCE AND INSURANCE

12427345

State of Tennessee

TENNESSEE REAL ESTATE COMMISSION

REAL ESTATE FIRM

LEBEL COMMERCIAL REALTY, LLC/DBA/LEBEL COMMERCIAL REALTY

This is to certify that all requirements of the State of Tennessee have been met.



ID NUMBER: 259635

LIC STATUS: ACTIVE

EXPIRATION DATE: January 21, 2023

IN-1313

DEPARTMENT OF
COMMERCE AND INSURANCE

CCIM Institute

An Affiliate of the NATIONAL ASSOCIATION OF REALTORS®

By election of the Governing Council has designated

Paul LeBel

as a

CERTIFIED COMMERCIAL INVESTMENT MEMBER



Barry Spizer

Barry Spizer, CCIM
2003 President

Certificate No.: 10827

May 1, 2003

Section III
Client References

1. Tennessee Valley Authority (TVA)

Katherine L McGinley
400 W. Summit Hill Drive, WT3B
Knoxville TN 37902
865-632-4845

I have assisted TVA with their Morristown facility.

2. City of Jefferson City

John Johnson, City Manager
PO Box 530
Jefferson City TN 37760
(865) 475-9071

I assisted the City of Jefferson City in disposal of property.

3. Veterans Administration (VA)

Kevin Milliken
621 James H. Quillen Mountain Home VAMC
US Department of Veteran Affairs
Mountain Home TN 37684
(423) 926-1171 x7727

I assisted the VA in locating the Morristown Clinic and a 2022 expansion of the facility.

4. City of Morristown

Tony Cox
City Administrator
100 West First North Street
Morristown, TN 37814
(423) 585-4603

I assist the City of Morristown in property purchases and sales.

5. Morristown Industrial Development Board (IDB)

Marshall Ramsey
P.O. Box 9
Morristown TN 37815
(423) 586-6382

I assist the IDB in property purchases and sales.

CONSULTING AGREEMENT Real Estate Consulting Agreement

THIS REAL ESTATE CONSULTING AGREEMENT (hereinafter "Agreement") is made this 20th day of May, 2016, by and between Hamblen County, Tennessee (the "County") and Lebel Commercial Realty (the "Consultant").

BACKGROUND:

- a. The County desires to retain the Consultant to provide certain real estate consulting services, and is of the opinion that Consultant has the necessary qualifications, experience, and abilities to provide such services to the County.
- b. The Consultant desires to provide certain real estate consulting services to the County in accordance with the terms and conditions contained in this Agreement.

NOW, THEREFORE, in consideration of the mutual benefits and obligations set forth in this Agreement, the receipt and sufficiency of which consideration is hereby acknowledged, County and Consultant agree as follows:

Services Provided

1. The County hereby agrees to retain the Consultant to provide the County with real estate consulting services (hereinafter "Services") related to a) the search for property for needs that may arise; b) the negotiation for the purchase and/or lease of identified property; and c) assistance with the process of closing the purchase and/or lease of identified property. The Consultant shall provide such real estate consulting services as reasonably requested by the County during the term of this Agreement, provided that nothing here within shall require the Consultant to devote a minimum number of hours per week to the performance of services herein.
2. Services will also include any other tasks that the County and the Consultant both mutual agree on.

Terms of Agreement

3. The term of this agreement will begin on the date of this Agreement and will remain in full force and effect until April 30, 2018.
4. Services shall be performed at the request of the County Mayor and/or the Chairman of the County Commission. A scope of work agreement must be signed by the County Mayor and the Consultant before billable hours can begin.
5. The Consultant shall provide a certificate of insurance which shall insure County against any errors or omissions of Consultant which might result in a claim or claims against County due to any act or failure to act of Consultant in connection with services provided hereunder. Consultant's production of a certificate of such

insurance in an amount not less than one million dollars (\$1,000,000) shall be a precondition of Consultant's providing services hereunder.

6. Notwithstanding the above, the County acknowledges and takes full responsibility and maintains control of all conclusions and decisions made as a result of the services provided by the Consultant. The County acknowledges that the Consultant cannot control future events, and therefore, cannot be responsible for long-term outcomes of budget or financial strategies.
7. This Agreement shall be for a time period specified by and agreed to by both parties. Cancellation of the Agreement requires written notification by the requesting party not less than 30 days in advance of cancellation unless it is determined by the County or the Consultant that a direct or indirect conflict of interest exists. If so, this Agreement will be terminated immediately without prejudice.
8. Under certain circumstances, brokers can have a conflict in the representation of two parties. If a professional conflict of interest arises involving lead broker Paul LeBel, LeBel Commercial Realty will assign broker Will Sliger to represent the County.
9. County acknowledges that the Consultant is an independent contractor and is NOT considered an employee of the County. Consultant acknowledges that it is an independent contractor and has no expectations to be treated as an employee.
10. Hamblen County's Request for Qualifications/Proposals for Real Estate Agent Services and LeBel Commercial Realty's response are part of this consulting agreement.

Performance

11. Both parties agree to do everything necessary to ensure that the terms of this Agreement take effect.

Compensation

12. For the services rendered by the Consultant, the Consultant will be compensated on a case by case basis depending on the scope of work. The Consultant may be paid a commission fee by the Seller/Landlord if a property transaction takes place. If the County is responsible for paying the fee, it may be a percent of the transaction amount or an hourly rate depending on the scope of work agreed upon by the Consultant and the County Mayor before work begins. The percentage fee, to be divided among the realtors involved, will be for transactions below \$300,000 and for transactions at or above \$300,000. The hourly fee is per hour. The hourly rate will be used for consulting duties that do not involve property transactions, such as negotiating lease agreements. For work compensated by the hourly rate, the Consultant shall submit an invoice for payment on a monthly basis that will be paid by the fifteenth of the subsequent month.

IN WITNESS WHEREOF the parties have duly affixed their signatures on this 20th day of May, 2016.

HAMBLEN COUNTY

Bill Buttain
Authorized Representative

County Mayor
Title

5/20/16

CONSULTANT

[Signature]
Authorized Representative

[Signature]
Title

5/23/16