

BID COVER PAGE

City of Gainesville
Procurement Division
200 E University Avenue, Rm 339
Gainesville, FL 32601
(352) 334-5021 (main)

REQUEST FOR PROPOSAL: CMGR-200030-GD:Real Estate Brokerage Services

PRE-PROPOSAL MEETING: ☒ Non-Mandatory ☐ Mandatory ☐ N/A ☐ Includes Site Visit
PRE-PROPOSAL MEETING DATE/TIME: Thursday, June 4, 2020 - 1:00PM
PRE-PROPOSAL MEETING LOCATION: ZOOM -
<https://us02web.zoom.us/j/85144803425?pwd=L1NoMS8raytBWU5BZ24rV1NHR1VLUT09>
 Meeting ID: 851 4480 3425 - Password: 4RnrBd

BIDDER QUESTIONS DUE DATE: Thursday, June 11, 2020 - 3:00PM

DUE DATE FOR SUBMITTING PROPOSAL ON DEMANDSTAR.COM: Friday, July 10, 2020 - 3:00PM

SUMMARY OF SCOPE OF WORK:

The City of Gainesville, Florida (City) is seeking qualified, experienced and licensed firm(s) to provide Real Estate Brokerage Services for the City Manager's Office, in accordance with the terms, conditions, and specifications contained in this Request for Proposals (RFP).

For questions relating to this solicitation, contact:

Gayle Dykeman, Procurement Specialist 3, 352-393-8789; dykemangb@cityofgainesville.org

Bidder is not in arrears to City upon any debt, fee, tax or contract: ☐ Bidder is NOT in arrears ☐ Bidder IS in arrears
 Bidder is not a defaulter, as surety or otherwise, upon any obligation to City: ☐ Bidder is NOT in default ☐ Bidder IS in default

Bidders who receive this bid from sources other than City of Gainesville Procurement Division or DemandStar.com MUST contact the Procurement Division prior to the due date to ensure any addenda are received in order to submit a responsible and responsive offer. Uploading an incomplete document may deem the offer non-responsive, causing rejection.

ADDENDA ACKNOWLEDGMENT: Prior to submitting my offer, I have verified that all addenda issued to date are considered as part of my offer: Addenda received (list all) # Addendum #1, Addendum #2

Legal Name of Bidder: Bosshardt Realty Services, LLC

DBA: Bosshardt Realty, Bosshardt Realty Services

Authorized Representative Name/Title: Aaron Bosshardt, Owner/Broker

E-mail Address: aaronbosshardt@bosshardtrealty.com FEIN: 59-2791463

Street Address: 5542 NW 43rd Street, Gainesville, Florida 32653

Mailing Address (if different): _____

Telephone: (352) 371-6100

Fax: (_____) _____

By signing this form, I acknowledge I have read and understand, and my business complies with all General Conditions and requirements set forth herein; and,

☒ Proposal is in full compliance with the Specifications.

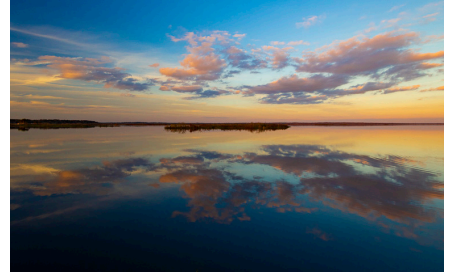
☐ Proposal is in full compliance with the Specifications except as specifically stated and attached hereto.

SIGNATURE OF AUTHORIZED REPRESENTATIVE: _____

SIGNER'S PRINTED NAME: Aaron Bosshardt

DATE: 7/10/2020

This page must be completed and uploaded to DemandStar.com with your Submittal.



CITY OF GAINESVILLE

Request For Proposal - CMGR-200030-GD: Real Estate Brokerage Services



Real estate brokerage services for The City of Gainesville | Due July 10, 2020 at 3:00pm



Serving all of North Central Florida, with offices in Gainesville, Newberry and Ocala

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A MESSAGE FROM AARON BOSSHARDT

Thank you for allowing Bosshardt Realty the opportunity to bid for the City of Gainesville's real estate brokerage services. For over thirty years, Bosshardt has been a top firm listing and selling residential and commercial real estate in Gainesville. We have done this by a commitment to our values, which are deeply-rooted in a tradition of service to the community and the belief that a job well done will bring value back to the community. We appreciate Gainesville's dedication to providing the best possible service and environment to its residents.

In addition to traditional real estate sales, we offer a full suite of services including, property management, community association management, and title services. Bosshardt Realty has over 100 active real estate agents, and when you choose to hire one of us, you get all of us as well as our team of managers, support staff, IT experts, graphic designer, and in-house legal and marketing support. Our sales team meets weekly to discuss industry and local market events. This is a value to you because no other brokerage is as dedicated to working together to provide community support, knowledge, and representation to its customers as Bosshardt.

Our company is excited about ensuring the continued vibrancy and growth of the City of Gainesville and we thank you for this opportunity.

Sincerely,

A handwritten signature in cursive script that reads "Aaron M. Bosshardt".

Aaron Bosshardt

COMMUNITY IMPACT

In excess of \$10 Billion in local sales since 1987
\$2 Billion in local commercial real estate transactions

Gainesville MLS statistics (1999-Present) for Bosshardt Realty Services

Firm percentage of sale price to list price (list side)	96.66%
Firm total sales (# of transactions)	26,438
Firm percentage of MLS sold listings	27.60%
Firm percentage of MLS sold volume	33.26%

MILLIONS in community donations and support

Bosshardt Charitable Fund

Being active in your community means much more than knowing the best places to eat, the best places for shopping, or in the case of our town, knowing the best place to spot some alligators. It is being an active part in your community by getting involved.

Since opening its doors in 1987, Bosshardt Realty Services, LLC has been actively involved with many local charities and organizations. Our commitment to the community has always been a big part of who we are as a leader in the real estate field.

In 2013, Aaron Bosshardt helped establish the Bosshardt Charitable Fund, which is comprised of employees and agents of the Family of Bosshardt Companies. The committee helps oversee the charitable involvement and commitment to the community for the Bosshardt companies.

The Bosshardt Charitable Fund supports many charitable endeavors in our community for a variety of programs and event sponsorships. Our Realtors® and staff donate a portion of their closing/ paycheck to help each of these local organizations. Sending a message to our community and our clients that we value this town we share and believe that it is worth taking sponsorship in.

Future goals: 100% REALTOR® Participation in charitable efforts!

Some of charities Bosshardt has supported include:

- Aces in Motion
- Alachua County Sheriffs Office
- American Cancer Society
- American Heart Association
- Boys and Girls Club of Alachua County
- Catholic Charities
- Children's Home Society
- Child Advocacy Center
- Chinese Weekend School
- City of Gainesville Beautification Board
- Cystic Fibrosis Foundation
- Dance Alive
- Danscompany of Gainesville
- Gainesville Women's Club
- Girls Place
- Girls Scouts
- Habitat for Humanity
- Haven Hospice
- Hope Lodge
- Humane Society of NCF
- Junior Achievement
- Junior League of Gainesville
- March of Dimes
- Meals on Wheels
- Milton Lewis Young Marines
- National Wild Turkey Federation
- Oak Hall Senior Mentor Program
- OneBlood
- Pace School for Girls
- Peaceful Paths
- Ronald McDonlad House
- Shands Pediatric Hospital
- St. Francis House
- Stop Children's Cancer
- Tylers Hope
- UF Health PALS THRIVE
- United Way
- WUFT and many more!

WHO WE ARE

Bosshardt Realty was founded in 1987 in Gainesville, Florida with one simple philosophy - *take care of the customer*. We've continued that customer-based approach for over three decades and have grown into an elite independent real estate firm with over one hundred sales associates, multiple locations in North Central Florida and a complete suite of agency services. The Bosshardt Companies provide both residential and commercial real estate services, property management, title services, and community association management.

Under the leadership of Aaron Bosshardt, Bosshardt Realty is focused on innovative real estate technology, principled business practices, local expertise, advanced marketing, and brilliant results.

Our Mission

To be a real estate company that provides exceptional real estate services that result in a stronger community with lasting relationships.

Vision Statement

To make real estate simple; providing our customers with a real estate experience they will want to repeat again and again.

Core Values

Excellence

The Quality of being outstanding or extremely good.

Family

One group related by a common cause providing excellence to our customers.

Citizenship

The character of an individual as a member of the Bosshardt Companies; behavior in terms of duties, obligations and functions.

Balance

Mental steadiness of emotional stability both professionally and personally.

Compassion

A feeling of empathy and understanding for all.

DEFINITIONS

Broker-Associate/Associate Broker - Is an industry professional who has completed the same requirements necessary to become a principal broker who is qualified to be a broker, but who chooses to operate as a sales associate in the employ of another and responsibilities may or may not include supervisory and management responsibilities. Many associate brokers choose to complete the additional educational requirements to enhance their level of competence.

CCIM - A Certified Commercial Investment Member (CCIM) is a recognized expert in the disciplines of commercial and investment real estate.

CPM - Certified Property Managers (CPM®) are recognized as experts in real estate management, and they are at the top of the profession.

CSP - The Certified New Home Sales Professional (CSP) designation is provided through The Institute of Residential Marketing. CSP was designed for specialists in new home sales to enhance their knowledge in the home building industry.

GRI - The Graduate, REALTOR® Institute (GRI) designation is the mark of a real estate professional who has made the commitment to provide a high level of professional services by securing a strong educational foundation. Realtors with the GRI designation have in-depth training in legal and regulatory issues, technology, and professional standards, as well as the sales process.

IREM - Institute of Real Estate Management is an international community of real estate managers dedicated to ethical business practices, maximizing the value of investment real estate, and promoting superior management through education and information sharing.

MB - A mortgage broker acts as an intermediary who brokers mortgage loans on behalf of individuals or businesses. Davonda obtained this designation never with the intention of becoming a mortgage broker but only to increase her knowledge of the mortgage process to better serve her customers.

Realtor® - is a licensed agent who must be a member of the National Association of Realtors®. As a member, they subscribe to the standards of the association and its code of ethics. "Essentially, the NAR holds them to a higher standard.

Vice President - Sales Associates who have obtained a Broker's license, have been with the company for three years or more, are career-oriented and actively involved in service, and operate his or her business contact in keeping with the high level of ethics and professionalism deemed representative of the Company.

OUR TEAM

AARON M. BOSSHARDT

A proven visionary and strategic leader that translates business strategies into maximum profits commensurate with the best interest of clients, customers, employees, and the public. An expert in business development, strategic asset management; real estate brokerage and property management. Dedicated to maintaining a reputation built on quality, service, and uncompromising ethics.

BRUCE RIDER

Bruce has been involved in sales, leasing and property management of office, retail and restaurant property in Gainesville for nearly two decades. While completing his studies at the University of Florida, Bruce began working for McGurn Management Company. Initially, focusing on the completion of Union Street Station, while heading up sales, leasing, and property management duties for various McGurn properties. Bruce eventually rose to become Vice President of McGurn Management Company. Upon joining Bosshardt Realty Services LLC, Bruce quickly became a multi-million-dollar producer and was named the Bosshardt "2006 Commercial Rookie of the Year." By 2016 Bruce was awarded the "Iron Man" award from the Gainesville Alachua County Association of Realtors (GACAR) Commercial Realtors committee. This signified over a decade of continuous superior work in the Commercial Real Estate industry in Gainesville and surrounding areas.

DAVONDA EUNIECE DIXON BROWN

Davonda has 30+ years of real estate experience. She is a lifelong resident of East Gainesville, a graduate of Eastside High School, attended SFCC and UF. Davonda has taught home buying courses through Community Ed offered by SFCC, NHDC and the City of Gainesville. She served on the advisory board of NHDC, started the Build Smart seminar offering instruction on budgeting/bookkeeping in preparation for loan application, design layout for construction with a vision of the future in mind. Davonda has been relied upon by many financial institutions including Fannie Mae to market their properties. Davonda served on the marketing team for all new homes communities in East Gainesville, not completed by City of Gainesville or NHDC.

DAVIN "FLIP" WOODY

Davin was born and raised in Gainesville, and has a desire to facilitate changes in East Gainesville. His focus is on helping first and second time home buyers find quality, affordable housing. Some of his projects have included Durelle Heights, Pleasant Acres and Lincoln Park. He gets a sense of reward when a new homeowner takes the keys to their new home and becomes a part of our community.

Davin believes you have to do more than give back to the community, you must be able to change it's existence.

MINIMUM QUALIFICATIONS

QUALIFIED

Bosshardt Realty Services, LLC is a 100% locally owned Real Estate Corporation with its home office in the city of Gainesville, Florida. Bosshardt Realty offers both residential and commercial real estate services, and possesses sufficient financial support, equipment and organization to provide these services for the City of Gainesville. The Real Estate Brokerage model traditionally requires the broker to advance working capital to service our customers, market and sell our customers' properties. Bosshardt is not paid a commission unless the seller and the buyer reach a successful closing. This can take as little as 10 days, but the process can often take years with certain types of properties. Bosshardt Realty is well-positioned to deliver real estate services now and into the future.

- Copy of Brokerage license (Page 42)
- Agent licenses (Pages 43 - 44)

EXPERIENCED

Bosshardt Realty has experience with large scale public and private successfully provided services with similar magnitude to those specified in the scope of services to at least one entity similar in size and complexity to the City of Gainesville or can demonstrate have the experience with large scale public and private sector clients.

- Aaron Bosshardt is a Marion County court appointed Receiver. In that role, he has overseen the management and disposition of 15 million dollars in commercial assets in Marion and Alachua County.
- Aaron Bosshardt served for 4 years on the Children Home Society of Florida State board of directors, executive committee and their real estate and finance committee. He oversaw the budget and real estate assets of the statewide organization, disposition and acquisition of properties.
- Aaron Bosshardt has experience in the sale, valuation, improvement, and leasing of green assets.
- Davonda Brown did extensive work as a listing and marketing agent for Fannie Mae (Page 35)

FINANCIALLY STABLE

Please see financial statement (Pages 22 - 27)

RESPECTED

See attached reference form- 3 references (Page 18)

TRUSTED

Bosshardt Realty has no record of judgments, pending lawsuits against the City or criminal activities involving moral turpitude and does not have any conflicts of interest that have not been waived by the City Commission.

STATEMENT OF QUALIFICATION

If awarded the contract, Bosshardt Realty will designate Aaron Bosshardt as the Contract Manager, whose responsibility shall be to oversee Bosshardt Realty's performance of its duties and obligations pursuant to the terms of the contract. Aaron Bosshardt will assign tasks and transactions to qualified and appropriate members of our sales team. We request that the City of Gainesville also designate a Contract Manager to oversee the contract.

Once the contract is awarded, Bosshardt Realty will meet with the stakeholders to better understand the City of Gainesville's goals and objectives for the portfolio in question. We will assess the property portfolio and produce a report with recommendations for the City within 120 days of being awarded the contract.

Bosshardt Realty is uniquely positioned to fulfill the qualifications that are required by the City of Gainesville in this Request for Proposal. We are not a franchise and we are 100% locally owned and operated, with our headquarters located within the city limits. Bosshardt is the area's only local real estate corporation that belongs to the appropriate affiliated networks and has credentialed experts in all fields of services requested by the City. We're local experts with global reach.

- Residential and commercial property management - Aaron Bosshardt, CPM, CCIM
- Commercial leasing and real estate brokerage - Bruce Rider, CCIM
- Affordable Housing - Davonda Brown, CSP, GRI
- Board Certified Real Estate Attorney - Kim Bosshardt
- Certified Property Manager, residential expert - Glennette Maxwell, CPM, RMP
- Community Association Management - Garry Griffin, CMCA, AMS, PCAM
- Membership in Gainesville Multiple Listing Services
- Gainesville Alachua County Association of Realtors
- Membership in Stellar Multiple Listing Services
- Members of the Builders Association of North Central Florida
- International Council of Shopping Centers
- Urban Land Institute
- National Association of Realtors
- Institute of Real Estate Management
- Community Association Institute
- Leading Real Estate Companies of the World
- Military on the Move
- Residential Sales team 100+ agents
- Additional Commercial Team Members: Robert Caniff, Tina Grossman DePaz, Robin Fall, Eric Ligman, Perry McDonald, Larry Taylor.

COST PROPOSAL PAGE

PART 7 – COST PROPOSAL PAGE

Proposer Name: Bosshardt Realty Services, LLC

Proposer agrees to supply the products and services at the prices bid below in accordance with the terms, conditions and specifications contained in this RFP. Price will be weighted at 10% of the overall evaluation of the proposal.

In all matters concerning the above Section 2.1, compensation for work performed shall be performance based and cost neutral to the City. Specifically, compensation shall be derived from the sales transaction proceeds, management fees and hourly advisory services rates.

Cost to the City: Contractor must quote firm, fixed, costs for all services/products identified in this R. These firm fixed costs for the project include any costs for travel and miscellaneous expenses. No other costs will be accepted.

Attach a breakdown of costs including but not limited to labor, equipment, materials and parts.

1. Proposed property sale commission percentage as defined in Section 2 See Schedule A %
2. Proposed lease cost percentage as defined in Section 2 See Schedule A %
3. Hourly rate for advisory services where commission is not earned \$ See Schedule A
(The number of hours the city expects to utilize these services is not anticipated to exceed 250 hours per year. The hours may vary depending on the need of the city.)

Failure to use the City's COST PROPOSAL Page and provide costs as requested in this RFP, may deem your proposal non-responsive.

Submitted by:

<u>Aaron Bosshardt</u>	<u><i>Aaron M Bosshardt</i></u>
Name (printed)	Signature
<u>7/9/2020</u>	<u>Owner</u>
Date	Title

SCHEDULE A

Proposed property sale commission percentage

Our fee is determined on a case by case basis depending on the complexity of the individual assignment/transaction. Typically, we propose a six percent (6%) commission with three percent (3%) to the listing broker, Bosshardt Realty Services, LLC., and three percent (3%) offered to the co-broker. In order to maintain a fiduciary relationship with the City, we recommend we represent the City of Gainesville as a single agent on all transactions.

Proposed lease cost percentage

Our fee for commercial leasing is five percent (5%) of the aggregate base rent due and payable during the initial term of the Transaction Agreement if Bosshardt Realty is the only Broker involved in the transaction, and six percent (6%) of the aggregate base rent due and payable during the initial term of the Transaction Agreement if there is a Cooperating Broker.

In order to meet the City's guidance that all leases are cost neutral, we will provide the City with a net rent evaluation on each transaction to help the City make a present-value decision on the cost of each transaction.

Hourly rate for advisory services where commission is not earned

If the City of Gainesville would like to engage Bosshardt Realty to consult where no lease or sale transaction will occur, we offer the first 25 hours of consulting service complimentary, and an additional 30 hours/year non-cumulative at no cost to the City of Gainesville. If additional consulting hours are needed, please see our rates below:

Aaron Bosshardt, CPM, CCIM: \$350/hr
Bruce Rider, CCIM: \$250/hr
Davonda Brown, CSP, GRI: \$125/hr
Davin Woody: \$125/hr

DRUG-FREE WORKPLACE FORM

DRUG-FREE WORKPLACE FORM

The undersigned bidder in accordance with Florida Statute 287.087 hereby certifies that

Bosshardt Realty Services, LLC

does:

(Name of Bidder)

1. Publish a statement notifying employees that the unlawful manufacture, distribution, dispensing, possession, or use of a controlled substance is prohibited in the workplace and specifying the actions that will be taken against employees for violations of such prohibition.
2. Inform employees about the dangers of drug abuse in the workplace, the business's policy of maintaining a drug-free workplace, any available drug counseling, rehabilitation, and employee assistance programs, and the penalties that may be imposed upon employees for the drug abuse violations.
3. Give each employee engaged in providing the commodities or contractual services that are under bid a copy of the statement specified in subsection (1).
4. In the statement specified in subsection (1), notify the employees that, as a condition of working on the commodities or contractual services that are under bid, the employee will abide by the terms of the statement and will notify the employer of any conviction of, or plea of guilty or nolo contendere to, any violation of Chapter 893 or of any controlled substance law of the United States or any state, for a violation occurring in the workplace no later than five (5) days after such conviction.
5. Impose a sanction on, or require the satisfactory participation in a drug abuse assistance or rehabilitation program if such is available in the employee's community, by any employee who is so convicted.
6. Make a good faith effort to continue to maintain a drug-free workplace through implementation of this section.

As the person authorized to sign the statement, I certify that this bidder complies fully with the above requirements.



Bidder's Signature

7/8/2020

Date

In the event of a tie bid, bidders with a Drug Free Workplace Program will be given preference. To be considered for the preference, this document must be completed and uploaded to DemandStar.com with your Submittal.

E-Bidding Document - RFP CMGR-200030-GD- Page 26 of 32

BIDDER VERIFICATION FORM

BIDDER VERIFICATION FORM

LOCAL PREFERENCE (Check one)

Local Preference requested: x YES NO

A copy of the following documents must be included in your submission if you are requesting Local Preference:

- Business Tax Receipt
- Zoning Compliance Permit

QUALIFIED SMALL BUSINESS AND/OR SERVICE DISABLED VETERAN BUSINESS STATUS (Check one)

Is your business qualified, in accordance with the City of Gainesville's Small Business Procurement Program, as a local Small Business? YES NO

Is your business qualified, in accordance with the City of Gainesville's Small Business Procurement Program, as a local Service-Disabled Veteran Business? YES x NO

LIVING WAGE COMPLIANCE

See Living Wage Decision Tree:

(Check one)

- ☒ Living Wage Ordinance does not apply (check all that apply)
- ☒ Not a covered service
- ☐ Contract does not exceed \$100,000
- ☐ Not a for-profit individual, business entity, corporation, partnership, limited liability company, joint venture, or similar business, who or which employees 50 or more persons, but not including employees of any subsidiaries, affiliates or parent businesses.
- ☐ Located within the City of Gainesville enterprise zone.
- ☐ Living Wage Ordinance applies and the completed Certification of Compliance with Living Wage is included with this bid.

NOTE: If Contractor has stated Living Wage Ordinance does not apply and it is later determined Living Wage Ordinance does apply, Contractor will be required to comply with the provision of the City of Gainesville's living wage requirements, as applicable, without any adjustment to the bid price.

REGISTERED TO DO BUSINESS IN THE STATE OF FLORIDA

Is Bidder registered with Florida Department of State's, Division of Corporations, to do business in the State of Florida? ☒ YES ☐ NO (refer to Part 1, 1.6, last paragraph)

If the answer is "YES", provide a copy of SunBiz registration or SunBiz Document Number (# L10000026778)

If the answer is "NO", please state reason why: _____

Bosshardt Realty Services, LLC

Bidder's Name

Aaron Bosshardt

Printed Name/Title of Authorized Representative



Signature of Authorized Representative

7/10/2020

Date

This page must be completed and uploaded to DemandStar.com with your Submittal.

CITY OF GAINESVILLE BUSINESS TAX RECEIPT



Please display in your
place of business

BUSINESS NAME AND MAILING ADDRESS

BOSSHARDT REALTY SERVICES, LLC.

5542 NW 43RD ST
GAINESVILLE, FL 32653

CITY OF GAINESVILLE

BUSINESS TAX RECEIPT

BILLING AND COLLECTIONS OFFICE
TREASURY DIVISION OF THE FINANCE DEPARTMENT

btmail@cityofgainesville.org

Customer Copy

TAX YEAR BEGINS OCTOBER 1, 2019

AND ENDS SEPTEMBER 30, 2020

BUSINESS TAX NO.

11415



BUSINESS LOCATION

5542 NW 43RD ST

BUSINESS PHONE

352-371-6100

BUSINESS E-MAIL

marlene@bosshardtrealty.com

Thank you for paying your business taxes for the period October 1, 2019 – September 30, 2020.

CATEGORY	DESCRIPTION	TAX FEE
1000	STATE LICENSE/CERTIFICATION REQUIRED	\$0.00
1001	FICTITIOUS NAME REQUIREMENT	\$0.00
2070	REAL ESTATE BROKER	\$105.00
TOTAL ASSIGNED:		\$105.00
TOTAL PAID:		\$105.00
AMOUNT DUE:		\$0.00

APPROVED BY FINANCE DIRECTOR



15B82D72AC1F4DAB95147B6889240AFC

ALL CITY, STATE AND FEDERAL REQUIREMENTS MUST BE MET IN ORDER TO LEGALLY OPERATE A BUSINESS. PROFESSION OR OCCUPATION WITHIN THE CORPORATE LIMITS OF GAINESVILLE, FLORIDA. PAYMENT OF BUSINESS TAXES AND A RECEIPT FOR PAYMENT DOES NOT IMPLY THAT A BUSINESS HAS COMPLIED WITH ANY OR ALL OTHER RELEVANT STATUTORY AND REGULATORY PROVISIONS.

THE CITY OF GAINESVILLE DOES NOT REFUND BUSINESS TAXES PAID IN ERROR UNLESS THE ERROR IS A CLERICAL MISTAKE MADE BY THE CITY.

If you have any questions about the Business Tax requirements or process, please email

btmail@cityofgainesville.org

If you cannot email to the address above, please call (352) 334-5024

IT IS THE BUSINESS OWNER'S RESPONSIBILITY TO REPORT ANY CHANGES IN BUSINESS INFORMATION

DURING THE YEAR TO

btmail@cityofgainesville.org

OR TO WEB SITE

<http://eservices.cityofgainesville.org>

ZONING COMPLIANCE



Zoning Verification Form

Name of Business	Bosshardt Realty Services, LLC
Business Address	Street Address: 5542 NW 43rd St Zip Code: 32653
Business Phone #	(352) 371-6100
Business Website	www.BosshardtRealty.com
Proposed Use of Premises or Business Type	Bosshardt Realty Services, LLC is a full-service real estate company. We service Residential, Commercial, and Vacant Land, with Sales and/or Leasing, needs to be accommodated. We represent Sellers, Buyers, and Investors.
Files May Be Uploaded to Assist Description	
Business Mailing Address	Street Address: 5542 NW 43rd St. Zip Code: 32653
Business Owner/Agent	Bruce Rider
Owner/Agent Phone	(352) 275-9613
Owner/Agent E-mail	BruceRider@BosshardtRealty.com
	I understand that I must comply with the current Florida Building Code through the Building Inspections Department (352) 334-5050, the current Florida Fire Prevention Code through the Gainesville Fire Rescue Risk Reduction Bureau (352) 334-5065, and obtain any necessary permit for construction and remodeling.
	I understand that I must obtain a Local Business Tax Receipt (Business License) through the Finance Department (352) 334-5024.

BP Rieder

Parcel Number(s)	06023-100-004
Zoning District	OF
Use Classification	Offices
Murphy Wellfield Protection	N/A
Wellfield Permit Required	No
Parking Standard for Vehicles	1 parking space for each 300 sqft of GFA or 1 space per employee, whichever is greater.
Parking Standard for Bicycles	10%
Parking Standard for Motorcycle/Scooter	-
Comments or Conditions	Approved
Reviewed By/Date	Brittany McMullen 7/10/20

Parcel & Address

Parcel: **06023-100-004** [Building Permits](#) [Taxes](#)

This parcel is in the city of Gainesville

Owner: BOSSHARDT PROPERTIES LLC

STR: 15-09-19 | [Get Maps](#) | [Zoom to STR](#)

Property Use: Office buildings, non-professional services, one story

Acre(s): 0.18

1 Building(s): 6794 Total Sq.Ft.

Physical Address(es):

5542 NW 43RD ST ([point](#))

Layers: [Cities](#) | [Parcels](#) | [Labels](#) | [STR](#)

- + Zoning & Future Land Use
- + Environmental
- + Public Schools
- + Flood Zones
- + Business Incentive Zones
- + Political Districts
- + Census

If you have a disability and need an accommodation to view or understand the data products on this mapping website, please feel free to call us at [352-374-5249](tel:352-374-5249) for in-person assistance.

If you have a disability and need an accommodation in order to participate in a County

REFERENCE FORM

REFERENCE FORM

Name of Bidder: Bosshardt Realty Services, LLC

Provide information for three references of similar scope performed within the past three years. You may include photos or other pertinent information.

#1 Year(s) services provided (for example: 1/2015 to 12/2018): 2015 - 2018

Company Name: Summit Realty
Address: 1701 N. Federal Highway, Suite 4
City, State Zip: Boca Raton, Florida 33432
Contact Name: Frank Gulisano
Phone Number: (561) 395-1216 Fax Number: _____
Email Address (if available): fgulisano@summitrealtyfl.com

#2 Year(s) services provided (for example: 1/2015 to 12/2018): 2010 - 2020

Company Name: FLM Investments
Address: 9 Lake Helix Drive
City, State Zip: La Mesa, CA 91941
Contact Name: Larry Marchesini
Phone Number: (619) 466-2457 Fax Number: _____
Email Address (if available): flminvest@cox.net

#3 Year(s) services provided (for example: 1/2015 to 12/2018): 11/2016-2020

Company Name: Gainesville Regional Utilities
Address: 4747 N. Main Street
City, State Zip: Gainesville, Florida 32609
Contact Name: Ann Mullins
Phone Number: (352) 262-9406 Fax Number: _____
Email Address (if available): Mullinsam@gru.com

CERTIFICATION OF COMPLIANCE WITH LIVING WAGE

CERTIFICATION OF COMPLIANCE WITH LIVING WAGE


The undersigned hereby agrees to comply with the terms of the Living Wage Ordinance and to pay all covered employees, as defined by City of Gainesville Ordinance 020663 as amended at 030168 (Living Wage Ordinance), during the time they are directly involved in providing covered services under the contract with the City of Gainesville for Real Estate Brokerage Services a living wage of \$12.3798 per hour to covered employees who receive Health Benefits from the undersigned employer and \$13.6298 per hour to covered employees not offered health care benefits by the undersigned employer.

Name of Service Contractor/Subcontractor: Bosshardt Realty Services, LLC
Address: 5542 NW 43rd Street, Gainesville, Florida 32653
Phone Number: (352) 371-6100
Name of Local Contact Person: Marlene Pendergast
Address: 5542 NW 43rd Street, Gainesville, Florida 32653
Phone Number: (352) 371-6100

\$
(Amount of Contract)

Aaron Bosshardt, Broker/Owner

Printed Name/Title of Authorized Representative

 7/8/2020
Signature of Authorized Representative Date

*This page must be completed and uploaded to DemandStar.com with your Submittal,
if the Living Wage Ordinance applies to bidder.*

Form W-9
(Rev. October 2018)
Department of the Treasury
Internal Revenue Service

Request for Taxpayer Identification Number and Certification

► Go to www.irs.gov/FormW9 for instructions and the latest information.

Give Form to the
requester. Do not
send to the IRS.

Print or type.
See Specific Instructions on page 3.

1 Name (as shown on your income tax return). Name is required on this line; do not leave this line blank. Bosshardt Realty Services LLC	
2 Business name/disregarded entity name, if different from above	
3 Check appropriate box for federal tax classification of the person whose name is entered on line 1. Check only one of the following seven boxes. <input type="checkbox"/> Individual/sole proprietor or single-member LLC <input type="checkbox"/> C Corporation <input type="checkbox"/> S Corporation <input type="checkbox"/> Partnership <input type="checkbox"/> Trust/estate <input checked="" type="checkbox"/> Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=Partnership) ► C Note: Check the appropriate box in the line above for the tax classification of the single-member owner. Do not check LLC if the LLC is classified as a single-member LLC that is disregarded from the owner unless the owner of the LLC is another LLC that is not disregarded from the owner for U.S. federal tax purposes. Otherwise, a single-member LLC that is disregarded from the owner should check the appropriate box for the tax classification of its owner. <input type="checkbox"/> Other (see instructions) ►	4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3): Exempt payee code (if any) _____ Exemption from FATCA reporting code (if any) _____ <i>(Applies to accounts maintained outside the U.S.)</i>
5 Address (number, street, and apt. or suite no.) See instructions. 5542 NW 43rd Street	Requester's name and address (optional)
6 City, state, and ZIP code Gainesville, FL 32653	
7 List account number(s) here (optional)	

Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN*, later.

Note: If the account is in more than one name, see the instructions for line 1. Also see *What Name and Number To Give the Requester* for guidelines on whose number to enter.

Social security number											
				-				-			
or											
Employer identification number											
5	9	-	2	7	9	1	4	6	3		

Part II Certification

Under penalties of perjury, I certify that:

- The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and
- I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and
- I am a U.S. citizen or other U.S. person (defined below); and
- The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

Certification instructions. You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions for Part II, later.

Sign Here	Signature of U.S. person ► 	Date ► 1/15/2020
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General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

Future developments. For the latest information about developments related to Form W-9 and its instructions, such as legislation enacted after they were published, go to www.irs.gov/FormW9.

Purpose of Form

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) which may be your social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN), to report on an information return the amount paid to you, or other amount reportable on an information return. Examples of information returns include, but are not limited to, the following.

- Form 1099-INT (interest earned or paid)

- Form 1099-DIV (dividends, including those from stocks or mutual funds)
- Form 1099-MISC (various types of income, prizes, awards, or gross proceeds)
- Form 1099-B (stock or mutual fund sales and certain other transactions by brokers)
- Form 1099-S (proceeds from real estate transactions)
- Form 1099-K (merchant card and third party network transactions)
- Form 1098 (home mortgage interest), 1098-E (student loan interest), 1098-T (tuition)
- Form 1099-C (canceled debt)
- Form 1099-A (acquisition or abandonment of secured property)

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN.

If you do not return Form W-9 to the requester with a TIN, you might be subject to backup withholding. See What is backup withholding, later.

IDENTIFICATION OF LAWSUITS

Broker is involved in a dispute with former agents, now with Colliers International, regarding commission due after leaving brokerage. Former agents independent contractor's agreement call for the dispute to be handled by arbitration, yet they sued broker in circuit court. Court agreed with broker that arbitration was the proper venue and agents have appealed.

FINANCIAL STATEMENTS

Bosshardt Realty Services LLC Balance Sheet December 31, 2019

ASSETS

Current Assets		
Drummond Escrow Funds 1636	\$	98,448.99
Drummond Operating 1628		250,767.96
Drummond Money Market 1644		603,507.47
Drummond D/R O/S Checks		163,354.65
First Fed N82MV 6304		1,295.55
Accounts Receivable		58,834.91
Prepaid Expenses		700.13
		<hr/>
Total Current Assets		1,176,909.66
Property and Equipment		
Airplane		445,257.82
Buildings-5532 Wtfd Park Lot		57,450.93
Solar Panels		92,745.00
Buildings-5532 Wtfd Park Bldg		443,269.30
Furniture & Fixtures		705,741.02
Computers & Equipment		320,710.53
Software		36,862.30
Leasehold Impr - 5542		81,326.99
Leasehold Impr - Haile		113,613.87
Automobiles		186,301.03
Less Accum Depreciation		(1,982,999.29)
Less Accum Amort-Software		(122,657.01)
		<hr/>
Total Property and Equipment		377,622.49
Other Assets		
Goodwill-BRSI to CB		2,015,625.00
		<hr/>
Total Other Assets		2,015,625.00
		<hr/>
Total Assets	\$	<u><u>3,570,157.15</u></u>

LIABILITIES AND CAPITAL

Current Liabilities		
Accounts Payable	\$	80,865.70
Accrued Expenses		77,400.00
Contingent Liability		460,000.00
Bosshardt Golf/Shands		(10.00)
Drummond Escrow Funds Liab		98,448.99
		<hr/>
Total Current Liabilities		716,704.69
Long-Term Liabilities		
Drummond Bank LOC		100,000.00
Wells Fargo LOC		463,524.82
Note Payable 5532 Centerstate		373,963.40
First Fed N82MV Loan		414,139.95
NP		1,499,950.00
Shareholders' Loans		(35,000.00)
		<hr/>
Total Long-Term Liabilities		2,816,578.17
		<hr/>
Total Liabilities		3,533,282.86
Capital		
Common Stock		150.17

Unaudited - For Management Purposes Only

Bosshardt Realty Services LLC
Balance Sheet
December 31, 2019

Add'l Paid in Capital	30,049.83	
Retained Earnings	(93,437.17)	
Net Income	<u>100,111.46</u>	
Total Capital		<u>36,874.29</u>
Total Liabilities & Capital		\$ <u><u>3,570,157.15</u></u>

Bosshardt Realty Services LLC
Income Statement
For the Twelve Months Ending December 31, 2019

	Current Month		Year to Date	
Revenues				
Comm Income-Residential-WP	\$ 281,114.79	30.53	\$ 4,014,376.70	41.57
Comm Income-Residential-Haile	132,592.77	14.40	2,225,812.62	23.05
Comm Income-Residential-Ocala	0.00	0.00	205,919.71	2.13
Comm Income-Residential-Newber	4,372.00	0.47	42,669.55	0.44
Comm Income-Residential-Wesche	42,061.44	4.57	457,768.37	4.74
Comm Income-Residential-New Ho	0.00	0.00	114,101.00	1.18
Comm Income-Residential-New Ge	27,541.20	2.99	169,044.30	1.75
Comm Income-Commercial Sales	352,730.38	38.30	1,289,871.39	13.36
Comm Income-Referrals-WP	0.00	0.00	40,767.03	0.42
Comm Income-Commercial Leases	33,982.57	3.69	410,595.43	4.25
Rental Income - Waterford Park	1,100.00	0.12	46,373.25	0.48
Transaction Fee - WP	11,444.84	1.24	158,726.16	1.64
Transaction Fee - Haile	5,349.96	0.58	94,743.75	0.98
Transaction Fee - Commercial	5,447.49	0.59	67,189.92	0.70
Transaction Fee - Ocala	0.00	0.00	11,624.19	0.12
Transaction Fee - Newberry	8,410.44	0.91	10,175.02	0.11
Transaction Fee - Weschester	1,925.94	0.21	60,665.01	0.63
Transaction Fee- New Homes	0.00	0.00	4,716.32	0.05
Transaction Fee - New Gen	1,256.04	0.14	7,937.71	0.08
Rental Income - Cornell Bldg	(2,590.67)	(0.28)	27,402.44	0.28
Rental Income - Hampton House	0.00	0.00	3,825.00	0.04
Tech Fee - IT	2,200.00	0.24	24,147.50	0.25
Tech Fee - Ocala	150.00	0.02	1,675.00	0.02
Admin Fee - Accounting	1,400.00	0.15	18,150.00	0.19
Bookkeeping Svc. Income	0.00	0.00	550.00	0.01
Allocation - IT	4,266.64	0.46	44,792.13	0.46
Interest Income	768.35	0.08	6,959.39	0.07
Ocala Split Fee	210.00	0.02	2,030.00	0.02
Late Fees - WP	0.00	0.00	(295.53)	0.00
Contract Labor Reimburse-WP	0.00	0.00	(1,116.88)	(0.01)
Marketing Income	3,755.54	0.41	55,376.58	0.57
Airplane Lease Income	0.00	0.00	4,601.00	0.05
Other Income - WP	1,416.77	0.15	34,943.85	0.36
Total Revenues	920,906.49	100.00	9,656,117.91	100.00
Cost of Sales				
Comm Paid-Residential-WP	202,271.63	21.96	2,760,645.29	28.59
Comm Paid-Residential-Haile	93,016.57	10.10	1,584,137.86	16.41
Comm Paid-Residential-Ocala	0.00	0.00	121,729.77	1.26
Comm Paid-Residential-Newberry	9,174.00	1.00	41,704.16	0.43
Comm Paid-Residential-Weschest	33,361.00	3.62	388,167.28	4.02
Comm Paid Residential-New Home	0.00	0.00	80,711.04	0.84
Comm Paid-Residential-New Gen	20,934.01	2.27	132,295.29	1.37
Comm Paid-Commercial-Leases	10,620.36	1.15	250,799.99	2.60
Comm Paid-Referrals - WP	2,512.80	0.27	30,236.54	0.31
Comm Paid-Referrals - Haile	0.00	0.00	6,121.47	0.06
Comm Paid-Referrals - Comm	3,721.97	0.40	31,598.68	0.33
Comm Paid-Referrals - Ocala	0.00	0.00	370.80	0.00
Comm Paid-Referrals - Newberry	0.00	0.00	1,958.10	0.02
Comm Paid-Ref Outside - WP	8,946.44	0.97	134,270.76	1.39
Comm Paid-Ref Outside - Haile	0.00	0.00	41,653.25	0.43
Comm Paid-Commercial-Sales	152,571.24	16.57	1,000,961.40	10.37
Comm Paid-Ref Outside - Ocala	0.00	0.00	4,398.75	0.05
Recruiting Incentive - WP	4,899.41	0.53	62,105.55	0.64
Recruiting Incentive - Haile	2,578.41	0.28	5,608.96	0.06
Recruiting Incentive - Ocala	0.00	0.00	1,907.76	0.02
Total Cost of Sales	544,607.84	59.14	6,681,382.70	69.19

For Management Purposes Only

Bosshardt Realty Services LLC
Income Statement
For the Twelve Months Ending December 31, 2019

	Current Month		Year to Date	
Gross Profit	376,298.65	40.86	2,974,735.21	30.81
Expenses				
Salaries & Wages - BRSI	32,570.93	3.54	400,306.27	4.15
Salaries & Wages - Mktg	12,390.00	1.35	109,608.75	1.14
Salaries & Wages - IT	9,557.34	1.04	94,422.09	0.98
Salaries & Wages - Ocala	1,095.55	0.12	9,497.68	0.10
Salaries & Wages - Accounting	14,908.32	1.62	112,146.56	1.16
Payroll Taxes - BRSI	2,491.65	0.27	31,970.36	0.33
Payroll Taxes - Mktg	947.83	0.10	8,822.68	0.09
Payroll Taxes - IT	731.14	0.08	7,636.91	0.08
Payroll Taxes - Ocala	83.81	0.01	630.35	0.01
Payroll Taxes - Accounting	1,140.48	0.12	8,992.99	0.09
Health & Dental Ins - BRSI	3,170.26	0.34	20,877.04	0.22
Health & Dental Ins - Mktg	928.98	0.10	8,903.43	0.09
Health & Dental Ins - IT	922.01	0.10	7,975.78	0.08
Health & Dental Ins - Ocala	3.26	0.00	(40.75)	0.00
Health & Dental Ins - Acctg	1,515.20	0.16	14,839.66	0.15
Accounting Expense-BRSI	358.29	0.04	4,399.16	0.05
Accounting Expense-Mktg	136.29	0.01	1,205.68	0.01
Accounting Expense-IT	105.12	0.01	1,038.71	0.01
Accounting Expense-Ocala	12.08	0.00	90.65	0.00
Accounting Expense-Acctg	163.99	0.02	1,233.61	0.01
Advertising - WP	248.05	0.03	7,444.81	0.08
Advertising - Ocala	625.00	0.07	1,250.00	0.01
Advertising - Print WP	3,100.00	0.34	34,025.97	0.35
Advertising - Print Mktg	5,459.89	0.59	5,459.89	0.06
Advertising - Print- Ocala	530.00	0.06	3,073.85	0.03
Advertising - Radio WP	1,526.00	0.17	27,521.00	0.29
Agents Gifts/Promotions	3,472.94	0.38	8,956.48	0.09
Airplane Expense	4,336.37	0.47	41,635.77	0.43
Amortization Expense	83,421.62	9.06	90,908.44	0.94
Auto Expense - BRSI	3,035.99	0.33	25,696.44	0.27
Bank Charges	0.00	0.00	4,389.30	0.05
CAM - Ocala Bldg.	0.00	0.00	865.36	0.01
Contract Labor - WP	246.50	0.03	25,835.90	0.27
Credit Card Charges	553.31	0.06	5,642.03	0.06
Depreciation Expense	134,431.62	14.60	227,608.44	2.36
Donations - WP	4,000.00	0.43	14,983.11	0.16
Dues & Subscriptions - WP	6,473.33	0.70	34,749.24	0.36
Dues & Subscriptions - Haile	547.06	0.06	8,269.45	0.09
Dues & Subscriptions - Naples	0.00	0.00	(420.00)	0.00
Dues & Subscriptions - Ocala	40.00	0.00	2,370.00	0.02
Dues & Subscriptions - Venice	0.00	0.00	24.50	0.00
Employee Relations - WP	3,440.00	0.37	1,351.54	0.01
Equipment Leasing - WP	2,508.25	0.27	33,336.12	0.35
Equipment Leasing - Haile	145.99	0.02	1,814.83	0.02
Equipment Leasing - Mktg	0.00	0.00	3,768.56	0.04
Equipment Leasing - IT	116.79	0.01	1,316.11	0.01
Equipment Leasing - Ocala	330.84	0.04	992.52	0.01
Equipment Leasing - Venice	0.00	0.00	(97.97)	0.00
Freight/Courier Service	0.00	0.00	121.85	0.00
Goodwill Expense	159,375.00	17.31	159,375.00	1.65
HR Expense	0.00	0.00	568.00	0.01
Insurance - E&O WP	(60.00)	(0.01)	5,618.00	0.06
Insurance W/C - WP	48.86	0.01	598.42	0.01
Insurance W/C - Mktg	18.59	0.00	164.45	0.00
Insurance W/C - IT	14.35	0.00	141.67	0.00
Insurance W/C - Ocala	27.26	0.00	85.07	0.00
Insurance W/C - Accounting	22.35	0.00	168.11	0.00

For Management Purposes Only

Bosshardt Realty Services LLC
 Income Statement
 For the Twelve Months Ending December 31, 2019

	Current Month		Year to Date	
Insurance - Life Officer WP	0.00	0.00	3,334.62	0.03
Insurance - Flood - Haile	0.00	0.00	1,476.00	0.02
Insurance Gen Liab - WP	5,274.25	0.57	24,092.20	0.25
Insurance Supp - WP	60.09	0.01	953.84	0.01
Insurance Supp - Mktg	30.52	0.00	217.72	0.00
Insurance Supp - IT	18.97	0.00	134.17	0.00
Insurance Supp - Ocala	1.20	0.00	13.80	0.00
Insurance Supp - Acctg	26.50	0.00	151.30	0.00
INTEREST Expense - WP	48,359.63	5.25	99,476.03	1.03
Internet Expense - BRSI	193.80	0.02	2,109.25	0.02
Internet Expense - Haile	370.00	0.04	4,004.87	0.04
Legal - Agent Disputes	1,818.35	0.20	18,093.05	0.19
Legal & Professional Fees WP	0.00	0.00	8,855.88	0.09
Licenses & Fees - WP	0.00	0.00	1,384.66	0.01
Licenses & Fees - Ocala	0.00	0.00	69.00	0.00
Licenses & Fees - St Augustine	0.00	0.00	69.00	0.00
Marketing Expense-WP	3,553.32	0.39	138,227.86	1.43
Marketing Expense-Mktg	500.00	0.05	500.00	0.01
Marketing Expense-Commercial	5,020.14	0.55	48,012.63	0.50
Marketing Expense-Lead Gen.	13,466.36	1.46	190,591.82	1.97
Meals & Entertainment WP	3,863.91	0.42	51,760.69	0.54
Meals & Entertainment Events	4,357.04	0.47	4,857.04	0.05
Meetings	398.20	0.04	5,135.04	0.05
Miscellaneous - WP	143.93	0.02	32,564.78	0.34
Office Supplies - WP	2,191.44	0.24	46,440.60	0.48
Office Supplies - Haile	94.91	0.01	1,584.89	0.02
Office Supplies - Ocala	10.10	0.00	1,264.13	0.01
Office Supplies - Acctg	43.76	0.00	2,307.69	0.02
Office Supplies - Newberry	0.00	0.00	476.98	0.00
Hardware - WP	112.35	0.01	4,174.23	0.04
Software - WP	11,248.56	1.22	57,534.40	0.60
Software - Ocala	0.00	0.00	26.33	0.00
Postage - WP	663.05	0.07	7,412.35	0.08
Postage - Mktg	166.40	0.02	3,447.90	0.04
Postage - Venice	0.00	0.00	102.73	0.00
Professional Development WP	2,502.00	0.27	12,978.57	0.13
Public Relations - WP	0.00	0.00	16,079.15	0.17
Public Relations - Haile	0.00	0.00	2,871.32	0.03
Recruitment Expense WP	2,592.69	0.28	6,131.16	0.06
Recruitment Expense Ocala	0.00	0.00	1,403.59	0.01
Rent - WP	11,711.92	1.27	135,059.85	1.40
Rent - Haile	0.00	0.00	(1,495.50)	(0.02)
Rent - Cornell	5,671.00	0.62	68,052.00	0.70
Rent - Ocala	666.87	0.07	7,148.28	0.07
Rent - Hampton	0.00	0.00	3,400.00	0.04
Rent - Newberry	300.00	0.03	3,600.00	0.04
Storage Facility WP	1,695.47	0.18	24,566.68	0.25
Repairs & Maint Bldg - WF	1,610.85	0.17	25,369.98	0.26
Repairs & Maint Bldg - Haile	351.36	0.04	5,555.00	0.06
Repairs & Maint Bldg - Cornell	0.00	0.00	10,961.74	0.11
Repairs & Maint Bldg - Ocala	54.57	0.01	469.52	0.00
Sign Expense - BRSI	0.00	0.00	3,370.92	0.03
Sign Expense - Mktg	69.20	0.01	10,128.24	0.10
Sign Expense - Ocala Office	0.00	0.00	3,072.37	0.03
Taxes - Other WP	13,778.61	1.50	34,420.21	0.36
Taxes - Other Haile	85.85	0.01	7,198.59	0.07
Taxes - Other Ocala	23.32	0.00	1,492.22	0.02
Telephone - WP	2,874.49	0.31	28,604.87	0.30
Telephone - Mktg	57.50	0.01	458.66	0.00
Telephone - IT	132.26	0.01	1,020.27	0.01
Telephone - Ocala	46.43	0.01	410.40	0.00

For Management Purposes Only

Bosshardt Realty Services LLC
Income Statement
For the Twelve Months Ending December 31, 2019

	Current Month		Year to Date	
Travel - WP	1,193.86	0.13	45,902.34	0.48
Utilities - WP	1,511.31	0.16	24,494.04	0.25
Utilities - Haile	341.92	0.04	4,138.75	0.04
Utilities - Cornell	0.00	0.00	651.81	0.01
Utilities - Naples	0.00	0.00	(1,551.02)	(0.02)
Utilities - Ocala	44.97	0.00	(43.65)	0.00
Utilities - Newberry	170.00	0.02	1,533.34	0.02
Utilities - Venice	390.00	0.04	390.00	0.00
Admin Allocation - WP	0.00	0.00	1,286.05	0.01
Admin Allocation - Haile	0.00	0.00	425.00	0.00
Admin Allocation - Weschester	0.00	0.00	41.65	0.00
	<hr/>		<hr/>	
Total Expenses	651,131.72	70.71	2,874,623.75	29.77
	<hr/>		<hr/>	
Net Income	\$ (274,833.07)	(29.84)	\$ 100,111.46	1.04
	<hr/>		<hr/>	

NO BID SURVEY

PART 11 – NO BID SURVEY

GENERAL GOVERNMENT PROCUREMENT DIVISION SURVEY BID INFORMATION

RFP #: CMGR-200030-GD

DUE DATE: July 10, 2020
@ 3:00 pm

PROPOSAL TITLE: Real Estate Brokerage Services

IF YOU DO NOT BID

Please check the appropriate or explain:

- _____ 1. Not enough bid response time.
- _____ 2. Specifications not clear.
- _____ 3. Do not submit bids to Municipalities.
- _____ 4. Current work load does not permit time to bid.
- _____ 5. Delay in payment from Governmental agencies.
- _____ 6. Do not handle this item.
- _____ 7. Other:

Bidder Name: _____

Address: _____

Are you a small business? YES NO

Are you a service-disabled veteran business? YES NO

*If you choose to not bid, complete this form, and either upload it into DemandStar.com
or email to the procurement specialist.*



EXECUTIVE SUMMARY

COMMITMENT | LEADERSHIP | INTEGRITY

A proven visionary and strategic leader that translates business strategies into maximum profits commensurate with the best interest of clients, customers, employees, and the public. An expert in enhancing profitability; business development, strategic asset management; real estate brokerage and property management. Dedicated to maintaining a reputation built on quality, service, and uncompromising ethics.

AREAS OF EXPERTISE

- Strategic / Tactical planning
- Property management
- Regulatory compliance
- Landlord tenant law
- Conflict dispute and resolution
- Asset management
- Association management
- Operations
- Talent acquisition
- Business mediation
- Real estate compensation plans
- Budgets and forecasting
- Sales force motivation
- Real estate brokerage
- Business development
- Receiverships
- Policies and procedures
- Managed in excess of 30,000 real estate transactions
- The area's leading expert in commercial and residential property management
- Personally involved in the area's largest and most complex commercial real estate transactions

PROFESSIONAL EXPERIENCE

Owner Broker - Bosshardt Realty Services, LLC (2018- Present)

President - Bosshardt Realty Services, LLC (2012-2018)

Reorganized and rebuilt the largest independent brokerage into Gainesville's #1 Broker by volume and transaction sides.

- Risk mitigation
- Explore and oversee mergers and acquisitions
- Lead and manage the sales management team.
- Manage and oversee vice presidents committee
- Explore new business lines

Co-Owner (2009 - Present) Bosshardt Title Insurance, LLC

Co founded ancillary service title company to maximize service for existing customers and clientele

- Develop and execute strategy to achieve growth and profitability
- Managed financials, human resources, public relations and marketing of a small business startup
- Business development
- Risk mitigation

Chief Operations Officer - Bosshardt Companies (2004-2012)

- Managed day-to-day operations of the various companies and management teams
- Worked with the CFO and controller on budgeting and forecasting
- Set and establish the strategic and marketing plans for each company
- Participate and lead company philanthropic efforts
- Recruit, mentor, lead and train
- Lead negotiator and mediator on all intracompany and external disputes

President - Bosshardt Property Management LLC (2000-2012)

- Organized and grew a highly profitable property management company
- Led senior management business-level discussion and decisions involving business vision and strategy, enterprise-level decisions, standardization of best practices, and project governance oversight.
- Managed administrative, legal, and financial functions for property management, real estate brokerage company, and shareholders.
- Conducted regular risk assessments and quality assurance reviews to evaluate compliance with requirements and to identify potential gaps in policies, procedures, and business processes.
- Opened commercial management business line
- Obtained Accredited Management Organization (AMO) designation through IREM
- Obtained an ISO 9000 rating for the company.

ACHIEVEMENTS

- Grew the third party management portfolio from 140 units and 6 associations to 865 units, 100 associations and 1,000,000 square feet of commercial space.
- Grew sustainable profits over 1000%
- Introduced and managed Bosshardt Property Management into two new revenue streams: commercial property and asset management
- Launched "Customers for Life" service campaign.
- Contributing Editor "Managing and Leasing Commercial Property"
- Built and added a profitable in house maintenance division.
- Created and developed area's leading residential lease document and management agreement

EXPERIENCE

- 2017 Gainesville Multiple Listing Service President
- 2016 Appointed in Marion County Court as a receiver over \$20 million in net assets
- Contributing editor 2016 revision managing and leasing commercial property Allan Alexander and Richard Muhlebach
- 2015 provided a seminar for the Florida Realtors® Annual Convention on commercial security deposits
- 2014-2016 Executive Committee Florida Realtors®
- 2012-2014 served as an expert panelist for the Institute of Real Estate Management (IREM) National Leadership Convention
- 2013 Lead seminar "Managing Commercial Property" for District 1 Conference Florida Realtors®
- 2012 Candidate for Florida House District 21
- 2011 Published four times in the Residential Resource, the trade magazine of the National Association of Residential Property Managers (NARPM)
- 2010 Published twice in the Residential Resource, the trade magazine of the National Association of Residential Property Managers (NARPM)
- 2010 Served as a real estate expert witness in Alachua County Court
- 2010 Obtained CPM through the Institute of Real Estate Marketing (IREM). The certified Property Manager designation is regarded as the highest designation a property manager can obtain.
- 2010 Instructed "Property Management 101" for the Gainesville Alachua County of Realtors® (GACAR) Property Management Committee
- 2009 Served as chairman of the Gainesville Alachua County Association of Realtors® (GACAR) professional standards committee. Chairing mediations and arbitrations relating to consumer complaints, commission disputes and ethics violation.

EDUCATION/LICENSES/DESIGNATIONS

- **CCIM** - CCIM Institute
- **CERTIFIED PROPERTY MANAGER (CPM)** - Institute of Real Estate Management
- **Bachelor of Arts Economics** - University of Florida
 - **Associates of Arts Degree** - Santa Fe College – Gainesville, FL
 - **Certified Residential Broker (CRB)**
 - **Council of Residential Brokers**
 - **Florida Licensed Broker**
 - **Florida Licensed Community Association Manager**

VOLUNTEER LEADERSHIP POSITIONS

- 2017 Immediate Past President of the Gainesville Multiple Listing Service
- 2018-2019 Regional Vice President Region 4 (Florida And Georgia) IREM
- 2020 Presidential Task Force Governance The Institute Of Real Estate Managment



SUMMARY

Bruce Rider has spent a lifetime in and around the real estate industry. Growing up in Michigan, Bruce's family business was in home building and real estate. Bruce has earned degrees from both Michigan State University (BS in Building Construction) and the University of Florida (Master of Arts in Real Estate). Bruce and his family adopted Gainesville as their home town in 1999.

Bruce has been involved in sales, leasing and property management of office, retail and restaurant property in Gainesville for nearly two decades. While completing his studies at the University of Florida, Bruce began working for McGurn Management Company. Initially, focusing on the completion of Union Street Station, while heading up sales, leasing, and property management duties for various McGurn properties. Bruce eventually rose to become Vice President of McGurn Management Company. Upon joining Bosshardt Realty Services LLC, Bruce quickly became a multi-million-dollar producer and was named the Bosshardt "2006 Commercial Rookie of the Year." By 2016 Bruce was awarded the "Iron Man" award from the Gainesville Alachua County Association of Realtors (GACAR) Commercial Realtors committee. This signified over a decade of continuous superior work in the Commercial Real Estate industry in Gainesville and surrounding areas.

Bruce has worked on numerous areas of commercial real estate in and around Gainesville. Sales would include a former eye surgical center on 39th Avenue that is now home to Shands ER. The former Sports Authority at I-75 and Newberry Rd is now the family entertainment business, "Flip Factory Zone." Land sales include being on the team to broker the award-winning "Brytan" Master Planned Community. Bruce also assisted a financial partner with underwriting a loan used to construct Gainesville's famed Cade Museum. Additionally, Bruce has worked with landlords and/or tenants to find or fill spaces as diverse as Sun Trust Bank, The Veterans Administration, Ollie's, Roses, Harbor Freight Tools, Advanced Auto Parts, Morgan Plumbing & Supply, and many more!

EDUCATION

Master of Arts in Real Estate - University of Florida, Gainesville, FL, June 2000

B.S. Building Construction - Michigan State University, East Lansing, MI, 1982

WORK EXPERIENCE

Bosshardt Realty Services, LLC. Gainesville FL 2006 - Present

McGurn Management Company, Gainesville, FL 2000 to 2006

Rider Custom Homes, Inc., Burton, MI, 1987 to 1999

John Weiland Homes, Atlanta, GA, 1984-86

LICENSES / CREDENTIALS

CCIM - National Association of Realtors, 2008

Real Estate Broker - State of Florida, current

GRI I, II, and III - Michigan Association of Realtors, 1992 and 1993

INDUSTRY VOLUNTEER WORK

Gainesville Alachua County Association of Realtors

Elected - Chairman Commercial/Investment Committee Chair 2008

Michigan Association of Home Builders Elected: Board of Directors, 1989 to 1999

Elected: Regional Vice President, 1992-93

Builders Association of Metro Flint, MI

Elected: President, 1992 Elected: Board of Directors, 1988-91

AWARDS

Bosshardt Realty Services, Inc. Commercial Rookie of the Year 2006 and Multi-Million Dollar Producer 2006 – current

Gainesville Alachua County Association of Realtors - “Iron Man”, 2016

Builders Association of Metro Flint: “Wall of Fame”, 1997 and “Builder of the Year”, 1991

COMMUNITY VOLUNTEER WORK

Westside Baptist Church, Gainesville FL Adult/High/College Bible Study Leader, 2002 - Current

South Baptist Church, Flint MI Bible Study, Deacon Early to Mid-1990's

Candidate: Michigan State House of Representatives. 1994

Genesee County Republican Party, Flint, MI Elected: Chairman 1996-98

Elected: Executive Committee, 1994-98

Genesee District Library Board, Grand Blanc, MI

Elected: 1996-98

RESUME | DAVONDA EUNIECE DIX BROWN



OBJECTIVE

Real Estate Brokerage Services - With over thirty years of experience in commercial and residential listing, marketing and selling properties throughout the Alachua County area and a proven track record of success. Adept at working with property owners and management, and developing successful business relationships with clients

EXPERIENCE

- Maintained files for accuracy and compliance according to FREC standards and procedures
- Utilized Appfiles, BoomTown, Paragon, Innovia, AMN, Homepath and record keeping and forms platforms to organize, maintain files and produce sales, listing and lease documents
- Set and managed appointments for inspections, repairs and to show homes to prospective clients
- Personally, dealt with lenders, home inspectors, pest control operators, escrow companies, and the like to ensure that all terms and conditions of purchase agreement were met prior to closing
- Compared recent property sales to subject property to ensure competitive market price
- Assist clients with determining the best financing options for their purchase
- Kept up to date on competitive real estate knowledge by attending conventions, reviewing listings and trade journals.
- Provide monthly market update to customers.
- Experienced with legal matters related to the real estate sales process
- Generated lists of properties compatible with buyer requests and needs
- Arranged meetings between buyers and sellers when terms needed to be negotiated
- Assisted in negotiation of terms surrounding purchases
- Coordinated property closings and oversaw closing procedures
- Prepared formal documents such as listing, purchase agreements and leases
- Arranged for title searches
- Accompanied and advised buyers during visits and inspections to ensure satisfaction with value and condition of property
- Previous business relationships as marketing, listing and sales agent: ITT Financial Corporation, Chrysler First Financial, Sun Bank, First Union Bank, Barnett Bank, Florida Federal Savings & Loan, Farmer's Home Administration, Fleet Financenter, Blazier Financial Services, American General, Alarion Bank, Fannie Mae, HUD, Alachua County, City of Gainesville

EDUCATION AND TRAINING

- Eastside High School 1975 - 1979
- Santa Fe Community College 1979 - 1981
- University of Florida (emphasis electrical engineering 1982 - 1984
- Florida Real Estate Institute - real estate studies 1984
- Focus on Leadership - graduate, leadership training 1990

COMPETENCIES & CERTIFICATIONS

- Licensed Real Estate Agent, 1986 - present
- Certified New Homes Sales Professional (CSP), 2004

- Graduate Real Estate Institute (GRI), 2005
- Mortgage Broker (MB), 2006
- Real Estate Broker, 2007
- Instructor Real Estate Course: City Gainesville, NHDC, past & present
- Santa Fe Community College
- Vice President, Bosshardt Realty Services, LLC, present

RESPONSIBILITIES AS A FANNIE MAE LISTING/MARKETING AGENT

- Confirm 911 address of assigned property
- Verify occupancy by visiting and posting Know Your Options notice
- Check utility status as another way of confirming occupancy
- Visit property weekly to confirm its condition and that it is secured
- If property is occupied offer, negotiate and coordinate CFK (Cash For Key) to expediate the vacancy and ultimate listing and marketing of property.
- Have property rekeyed once it is vacant and provide a secure combo lock box for all other Fannie Mae vendors access.
- Contact HOA, if any for information and copy of Covenants and Restrictions that would then be made available to any potential buyers in MLS (Multiple Listing Service).
- Coordinate the connection of utilities with various providers.
- Coordinate utility reimbursement to the broker
- Complete BPO (Broker Price Opinion) used to support the professional opinion that will help determine the potential selling price or estimated value of a real estate property.
- Complete an assessment of the condition of the property and suggest repairs, if any.
- Confirm and approve the successful completion of all repairs
- List and begin aggressively marketing property
- Provide monthly marketing update
- Complete updated BPO (Broker Price Opinion) every 6 months
- Coordinate closing and completion of internal property file



SALES LEADERSHIP

Proven track record of sales goal and strategic account development in the business to business arena, delivering revenue and market share growth.

- Highly motivated leader with varied experiences in developing highly qualified leaders and decision makers to drive sustained monthly sales goal attainment
- Achieved strong financial results through strategic account management by cultivating key partnerships within the commercial and residential real estate markets
- Leveraged professional sales classes and management experience to coach, educate, and develop
- Developed networks of advocates within the territory to influence purchasing habits
- Display commercial and residential properties to clients and explain their features
- Strategic planning and execution
- Strategic account management
- Sales performance management
- Sales force leadership
- Conflict management
- Platform presentation experiences
- Million dollar producer
- New business negotiations
- New hire facilitation
- Problem solving and change management
- Commercial account management
- Personal account management

PROFESSIONAL EXPERIENCE

Bosshardt Realty Services, LLC Gainesville, FL 2006 - Present

Local real estate company specializing in residential, commercial and community associate management

Real Estate Agent

Increased performance portfolio and sales growth within the real estate industry maximizing product purchase and brand recognition

- Multi-Million-dollar producer 2011. Excess of 9 Million in 2018. Trending in excess of \$10 million in sales 2019.
- Million-dollar producer 2007-2009 during down market.
- Recognized as Rising Star for million-dollar producer in first year.
- Continuously analyze sales trends on a macro (territory) and micro (individual personal property) level to determine customer needs and adjust selling styles and materials to meet those individual needs.
- Manage appointments to show homes and properties to prospective buyers.
- Develop creative pull-through strategies such as product blitzing, increasing brand awareness and product visibility to increase volume of sales.
- Negotiate purchase agreements and contracts with buyers and sellers.
- Prepare legal real estate documents such as deeds and leases.
- Confer with escrow companies, lenders, home inspectors and pest control operations to ensure that terms and conditions of purchase agreement are met before closing dates.

North Florida Care and Comfort, LLC 2008 – 2016

Medicare provider company offering services to people with mental disabilities in need of structured daily care.

SMALL BUSINESS OWNER

Sole owner and operator

- Negotiated contracts to service clients.
- Achieved excellent ratings in excess of 85% benchmark.
- Networked with state officials to reach top 4% in area of securing contracts.
- Recruited, interviewed, hired and trained all staff in provisional care.

Florida Juvenile Justice Agent 1985 – 1986

Safe community designed to increase public safety by reducing juvenile delinquency through effective prevention, intervention and treatment services.

SENIOR PROBATION OFFICER 1986- 2005

- Supervised in excess of 60 offenders on caseload without shift incident.
- Reduced recidivism by 90% by placing ex-offenders in gainful employment positions.
- Attended court sessions and parole hearings.
- Made sentencing dispositions to the courts.
- Prepared affidavits and warrants.
- Requested parole warrants.
- Drug Offender Unit

Florida Private Investigator 1988 – 1994**EDUCATION AND CREDENTIALS**

B. S. Criminal Justice - Florida A&M University (FAMU) 1981 -1985

Candidate City Commissioner - 2000

Licensed Real Estate Agent - State of Florida 2006

Real Estate Rising Star - 2006

Massimo CRE Certified - Commercial Real Estate - 2015

App-files National Realtor Association

Event Organizer - FAMU Alumni Chapter 2015 -

Med-Wavier Assisting Living Certification - 2008-2016

Alachua County Housing Financial Advisory Board - 2015 -2017 Chairman 2018 -

ADDITIONAL SKILLS AND TRAINING

- Data base reporting software – Internet based MLS database software
- National Associate of Realtors Online Database
- Customer relationship management CRM software – Mail Chimp
- Graphics or photo imaging software – ClipEaze, Easypano Tourweaver
- Data mining software – ListGrabber, eGrabber

RESUME | BOSSHARDT PROPERTY MANAGEMENT

COMMERCIAL MANAGEMENT DIVISION INTRODUCTION AND QUALIFICATIONS:

Bosshardt Property Management (BPM) was founded in 1989. Our corporate office is located in Gainesville, Florida. We also have offices in Ocala, Kissimmee, Crystal River and Venice, Florida.

BPM has experience and expertise in a wide range of property management products. We manage and lease office, retail, industrial, mixed-use and residential. BPM holds several designations and memberships in various property management fields. We hold the AMO, Accredited Management Organization designation. The ACCREDITED MANAGEMENT ORGANIZATION accreditation is the only recognition of excellence given to real estate management firms. To earn the AMO accreditation, real estate management firms must meet stringent standards and abide by a new AMO Code of Professional Ethics - all based on BestPractices: Real Estate Management Service. These best practices provide a reasonable framework for the professional delivery of real estate management services meaning AMO Firms can demonstrate to investors and clients that they don't just meet the industry standards... they set them. We are also members of IREM, Institute of Real Estate Management which is known throughout the world as the organization to look to for professional property and asset managers.

We are a provider that can enhance your property by developing solutions that will increase revenue, reduce expenses, and maximize perceived value. Our management approach directly supports the ownership's financial and operational goals. We expertly analyze your properties physical, operational, and financial condition and make recommendations that will maximize your return.

SERVICES:

We have proven experience in NOI enhancement, strategic modification, value enhancement, lease negotiations, and vendor oversight. Our commercial management packages include:

- Building operations Tenant relations
- Financial management Full tenant screenings
- Lease analysis Collection of fees
- Move in/Move out procedures Routine inspections
- Maintenance coordination Emergency on-call services
- Tenant construction Handicap accessibility compliance

KEY STAFFING POSITIONS:

Bosshardt Property Management has a well-qualified staff with extensive knowledge of all aspects of commercial management and leasing:

Garry Griffin CMCA, AMS, PCAM, President of Bosshardt Property Management, LLC. Garry Griffin joined the firm in 1989. During his tenure, he has served as a Real Estate Broker, Marketing Director, and Sales Trainer. He presently serves as President of the Property Management Division and oversees the operations of the company's Residential, Commercial and Community Association Division.

He is also the Broker / Manager for the Ocala Branch office. Garry holds a Broker's and Community Association Manager's license. He is a member of CAI, Community Association Institute and earned his Certified Manager of Community Associations, Association Management Specialist, and Professional Community Association Manager designations. His many years in the industry with

Bosshardt bring a level of experience and knowledge to all our clients and customers.

Aaron Bosshardt CPM, CRB, Aaron Bosshardt is part owner at Bosshardt Property Management, LLC. He serves our clients as asset manager, assisting in budgeting, planning and evaluation of property pro-formas to achieve client objectives and goals. He has served in various leadership roles with the Institute of Real Estate Management, Florida Realtors commercial council, and The National Association of Property Managers. He has been published in the Journal of Property Management (JPM) and the Residential Resource.

Reno Rubeis, Commercial Property Manager, has been a resident of Gainesville since 1999. Mr. Rubeis has a bachelor's degree in finance from Kent State University (Ohio) and holds licenses as a Certified General Real Estate Appraiser (Inactive) and as a Real Estate Salesman with the State of Florida. Mr. Rubeis possesses over 22 years of real estate experience, with 11-years of commercial real estate appraisal and advisory experience with major financial, insurance and equity firms involved in investment grade real estate. This exposure lead to the real estate development and management field with the Integroup Company for two years, followed by eight years as the VP of Finance and Administration for Campus Development Group / Suite USA Management Inc. which were related entities that developed, built and managed rental apartment complexes. Following, Mr. Rubeis ventured out and became part of several small real estate investment groups. After the market adjustment in 2008, Mr. Rubeis owned and managed a service retail business which was sold in 2013. Mr. Rubeis joined Bosshardt Realty Services as the Special Projects Coordinator in late 2014, overseeing the development and management of the new Haile Medical Office building while managing other major assets.

FINANCIAL REPORTING:

Bosshardt Property Management will provide timely and informative financial reports each month. We typically provide the following reports:

- Balance sheet
- Income/expense variance
- Tenant delinquencies
- Rent roll
- Income register
- Expense register
- Check register
- General ledger
- Common area maintenance
- Accounting
- Reconciliation

Our reports are accurate and easy to read.

FEES:

A monthly management fee is charged each month for the day to day operations of the project. Our monthly management fee includes the following services:

- Building operations tenant relations
- Financial management emergency on-call services
- Collection of fees handicap accessibility compliance
- Move in/move out procedures routine inspections
- Maintenance coordination
- Tenant construction

CURRENT COMMERCIAL CUSTOMERS AND REFERENCES:

Bosshardt Property Management manages a wide range of commercial properties in many areas of the State comprising around 1,000,000 SF of space. Some of our current properties and customers include:

- Naylor Publications
- Saint Tropez. Northside Shopping Center Gainesville
- Fresenius Medical Care Holdings, 10 Dialysis Groups
- Wells Fargo
- 34th Street Mini Storage
- 34th Street Shopping Center
- Ace Hardware
- Timber Village Shopping Center
- Robinswood Plaza
- Bristol Park
- City Centre Downtown Kissimmee

REFERENCES:

Larry Marchesini Saint Tropez Northside Shopping Center
9 Lake Helix Drive
La Mesa California 91941
flminvest@cox.net
619-466-2457 home
619-250-4019 cell

Rabbi Jonah Zinn CEO University of Florida Hillel
2020 West University Avenue
Norman H. Lipoff Hall
Gainesville, FL 32603
(352) 372-2900

Diane Brant General Partner
34th Street Plaza
561-637-4003

Michael Moss Managing Partner
Naylor Publications
352-256-3750

David Richardson
Owner Timber Village Shopping Center
352-538-4356

CAPABILITY STATEMENT | BOSSHARDT PROPERTY MANAGEMENT

Reference:

Source Sought Notice No. 1630DC-20-N-00001

RFI No. 1630DC-20-N-00001

Bosshardt Property Management, LLC

5522 NW 43rd Street - Gainesville, FL 32653

Contact person: Garry Griffin, President. email: garry@bosshardtcam.com phone: 352-843-0705

DUNS: 015745605

Bosshardt Property Management is a Woman Owned Small Business Organization

To Whom It May Concern,

Please accept this document as our Capabilities Statement for RFI No. 1630DC-20-N-00001. A summary of our business operations follows on the next page.

Regards,

Garry H. Griffin, President Bosshardt Property Management, LLC

Bosshardt Property Management, LLC

Core Competencies:

- Maintenance Controls and Facilities Management. Includes routine site visits, written documentation and management plans. We have an in-house team of maintenance techs plus a large database of third-party vendors to call on when the need arises. We have a 24/7 emergency line and response to property emergencies. We have specific capabilities to provide:
 - o 24/7 Site Security by licensed security personnel
 - o A team of commercial property managers who conduct routine site visits/inspections of the property
 - o Licensed and insured lawn care personnel to maintain the landscaping
- Risk Management. We analyze and identify potential risk components and develop/implement plans to mitigate risks. Common components to risk management include lighting, slip and fall areas, security, etc.
- Financial Analysis. Bosshardt Property Management employs a team of accounts and bookkeepers to properly document income and expenses and other financial aspects of the property which ultimately effects the performance and value of the asset.
- Compliance and Legal. Our team is knowledgeable on all local, State, and Federal regulations pertaining to management of commercial property.

Differentiators:

- Our office location is less than 5 miles from the subject property.
- Our staff and vendors are local and can respond to an issue within minutes.
- Our staff hold many designations and credentials relating to property management including:
 - o Certified Property Manager (CPM)
 - o Certified Commercial Investment Member (CCIM)
 - o Professional Community Association Manager (PCAM)

Current and Past Performance/Customers:

- Bosshardt Property Management has been doing business in the Alachua County area since 1989. We currently manage 1 million square feet of space. References can be provided upon request.

Company Data:

- Woman Owned Small Business
- Average 35 employees
- \$3,000,000 per year in gross revenue
- In-house legal and maintenance department
- We serve Alachua and surrounding counties
- www.bosshardtpm.com

BROKERAGE LICENSE



Ron DeSantis, Governor

Halsey Beshears, Secretary



STATE OF FLORIDA
DEPARTMENT OF BUSINESS AND PROFESSIONAL REGULATION

DIVISION OF REAL ESTATE

THE CORPORATION HEREIN HAS REGISTERED UNDER THE
PROVISIONS OF CHAPTER 475, FLORIDA STATUTES

BOSSHARDT REALTY SERVICES LLC

5542 NW 43RD ST
GAINESVILLE FL 32653

LICENSE NUMBER: CQ1036638

EXPIRATION DATE: MARCH 31, 2022

Always verify licenses online at MyFloridaLicense.com




Do not alter this document in any form.

This is your license. It is unlawful for anyone other than the licensee to use this document.

REALTOR LICENSES

 RICK SCOTT, GOVERNOR

JONATHAN ZACHEM, SECRETARY



STATE OF FLORIDA
DEPARTMENT OF BUSINESS AND PROFESSIONAL REGULATION
DIVISION OF REAL ESTATE

THE BROKER HEREIN IS LICENSED UNDER THE
PROVISIONS OF CHAPTER 475, FLORIDA STATUTES

BOSSHARDT, AARON MANDEL
5542 NW 43RD ST
GAINESVILLE FL 32653

LICENSE NUMBER: BK635736


EXPIRATION DATE: SEPTEMBER 30, 2020

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 Ron DeSantis, Governor

Halsey Beshears, Secretary



STATE OF FLORIDA
DEPARTMENT OF BUSINESS AND PROFESSIONAL REGULATION
DIVISION OF REAL ESTATE


THE BROKER HEREIN IS LICENSED UNDER THE
PROVISIONS OF CHAPTER 475, FLORIDA STATUTES

RIDER, BRUCE DOUGLAS
5542 NW 43RD STREET
GAINESVILLE FL 32653

LICENSE NUMBER: BK3010435

EXPIRATION DATE: MARCH 31, 2021


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REALTOR LICENSES

 Ron DeSantis, Governor


Halsey Beshears, Secretary 

STATE OF FLORIDA
DEPARTMENT OF BUSINESS AND PROFESSIONAL REGULATION
DIVISION OF REAL ESTATE

THE BROKER HEREIN IS LICENSED UNDER THE
PROVISIONS OF CHAPTER 475, FLORIDA STATUTES

DIX BROWN, DAVONDA EUNIECE
1015 NE 24TH STREET
GAINESVILLE FL 32641

LICENSE NUMBER: BK448090
EXPIRATION DATE: MARCH 31, 2021
Always verify licenses online at MyFloridaLicense.com



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 Ron DeSantis, Governor

Halsey Beshears, Secretary 

STATE OF FLORIDA
DEPARTMENT OF BUSINESS AND PROFESSIONAL REGULATION
DIVISION OF REAL ESTATE

THE SALES ASSOCIATE HEREIN IS LICENSED UNDER THE
PROVISIONS OF CHAPTER 475, FLORIDA STATUTES

WOODY, DAVIN D
6040 SW 63RD BLVD
GAINESVILLE FL 32605

LICENSE NUMBER: SL3153641
EXPIRATION DATE: SEPTEMBER 30, 2021
Always verify licenses online at MyFloridaLicense.com



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[Department of State](#) / [Division of Corporations](#) / [Search Records](#) / [Search by Officer/Registered Agent Name](#) /

Detail by Officer/Registered Agent Name

Florida Limited Liability Company
BOSSHARDT REALTY SERVICES, LLC

Filing Information

Document Number	L10000026778
FEI/EIN Number	59-2791463
Date Filed	03/08/2010
Effective Date	10/30/2009
State	FL
Status	ACTIVE
Last Event	LC DISSOCIATION MEM
Event Date Filed	11/16/2015
Event Effective Date	NONE

Principal Address

5542 N.W. 43RD ST.
GAINESVILLE, FL 32653

Changed: 07/19/2010

Mailing Address

5542 N.W. 43RD ST.
GAINESVILLE, FL 32653

Changed: 07/19/2010

Registered Agent Name & Address

BOSSHARDT LAW GROUP, LLC
5532 NW 43RD STREET
GAINESVILLE, FL 32653

Name Changed: 06/08/2020

Address Changed: 04/29/2011

Authorized Person(s) Detail

Name & Address

Title MGRM

OTHER PROGRAMS AND AFFILIATIONS



LeadingRe - <https://www.leadingre.com/aboutus>

Leading Real Estate Companies of the World® (LeadingRE) is the home of the world's market-leading independent residential brokerages in 70 countries, with 550 firms and 135,000 sales associates producing 1.1 million global transactions. Our by-invitation-only network is based on the unparalleled performance and trusted relationships that result in exceptional client experiences. Leading Real Estate Companies of the World® with the goal of controlling their own destiny and creating a network comprised of only the best locally- and regionally-branded firms focused on raising the bar in real estate. Today, we lead the industry in reputation and a long list of metrics related to sales, market coverage, and more. LeadingRE's mantra is "Making the Best Brokerages Better," by providing these leading local brands with world-class business resources and national and global connections. Read more about our Global Reach.



Military on the Move - <https://www.usmilitaryonthemove.com/>

The U.S. Military on the Move® program is offered by participating brokerages of Leading Real Estate Companies of the World® who want to give back to our military by offering a rebate or credit on a home sale or purchase to eligible service members. Please complete the registration form and we will connect you with a real estate agent. The basic benefit to the military consumer is a cash rebate equal to 20% of the function side commission paid at closing. Certain states do not allow payment of such a rebate. It is the broker's responsibility to understand and adhere to local and state laws regarding the payment of rebates. When working with sellers, the individual broker/agent may opt to negotiate fees in lieu of the rebate.

Residential - In order to engage and market to local real estate professionals, the City of Gainesville should ensure that the winning firm is a member of the Gainesville MLS and Alachua County Association of Realtors. While most out-of-area firms are not members, Bosshardt Realty is a member of the Gainesville MLS and Alachua County Association of Realtors.

Commercial - LoopNet, Crexi, CCIM

BOSSHARDT IN THE COMMUNITY

For 32 years and counting

Bosshardt Realty has truly been the “home team” both in real estate transactions and in community involvement. We know our customers want the businesses they work with to be an active part of the community they have chosen to live, work, build and play in. As a family owned company, we are able to keep ALL of our dollars local.

We understand. Supporting the community that supports us has always been a part of our philosophy and culture. In the three decades we have been in business we have supported 100's of local charities. Some of these include donating K-9's to the sheriffs office, serving on the Children's Home Society board, being chairs for the American Heart Association, serving meals weekly with Meals on Wheels, building homes with Habitat for Humanity, cooking dinners for Ronald McDonald House and so much more.

In 2013, we started the “Bosshardt Charitable Fund” as a way for our Realtors®, staff and management to give a portion of their commissions, or paycheck to help support our community endeavors, including charities that they have personal ties to.

In 2015, our agents, staff and management logged over 4500 hours of community service; that is over 12 hours a day for a FULL YEAR! This is not unusual, we decided we would track the hours that year.

In 2016 Bosshardt was honored with the Corporate Legacy Award from the Community Foundation of North Central Florida. This award recognizes a company that exemplifies giving back to their community through volunteerism and charitable giving. **Watch the video here:** https://www.youtube.com/watch?time_continue=3&v=3CrDrKcxSXs



Our biggest support over the past 19+ years has gone to the UF Health PALS THRIVE Program. This anti-suicide, anti-violence program was started by two teens in response to the Columbine shootings, and has since helped hundreds of local students navigate the growing pressures of middle and high school.

PALS THRIVE continues to grow and help kids learn to overcome obstacles, gain self-esteem and become leaders. We know this program has saved many lives, including a potential school shooting, but just as important it has fostered leaders throughout our community.

BOSSHARDT SUPPORT

Bosshardt provides a lot of support for their Realtors®, from Management to staff we are dedicated to the success of all our Realtors®. Our Realtors® benefit from having a non competing management team, a marketing team that are also non competing and have degrees in Graphic Design and Advertising and are REDM (Real Estate Digital Marketer) Certified. Additionally, they have a support staff that add an extra hand when needed. When you hire one of our Realtors® you hire this extensive team too.



Aaron Bosshardt
Owner of Bosshardt Realty



Gene Anne McKay
President of Bosshardt Realty



Autumn Doughton Stanton
Assistant to Aaron and Support



Mike Stanton
Director of Marketing



Stacey Aasved
Graphic Designer/Custom Marketing



Michelle Schibuola
General Marketing



Matt Chapman
Sales Manager



Debbie Wilkinson
Realtor® Support



Stacey O'Brien
Realtor® Support



Kim Bosshardt
Board Certified Real Estate Attorney



Kelly Mena
Real Estate Attorney



Eddie Bell
Appraiser

Bosshardt has two retired contractors (Bruce Rider and Mark Constant) that make an excellent resource for questions concerning construction matters.

MARKETING TEAM



Experience Matters

Bosshardt Realty understands that in order for our Realtors® to be successful they need to know every aspect of real estate, it would not be fair to ask them to split their focus with marketing. That is why Bosshardt has a marketing team of professionals to assist our Realtors® with this very important area of their business. This way they can fully focus on YOU and your properties!

Mike Stanton (center):

Is the director of marketing. Highly educated in the technical aspects of real estate marketing. He makes sure our Realtors® have the best programs, the best apps, and anything else he thinks will help our Realtors® be better prepared, and better set up for success both online and in print. Mike has worked with Bosshardt for over 7 years.

Stacey Aasved (right):

Is our graphic designer and marketing guru. She has a degree in graphic design from Savannah College of Art and Design (SCAD), and is versed in the Storybrand framework. She is also the only certified Real Estate Digital Marketer (REDM) in North Central Florida. Stacey has been with Bosshardt Realty for over 6 years. She designs all of our custom marketing materials, and assists with our social media accounts.

Michelle Schibuola (left):

Michelle handles all of our general marketing, flyers, brochures, just listed and just sold cards. She has a degree in advertising from the University of Florida, and has been with Bosshardt Realty for a combined 10 years (taking a break when she had kids, but returning 6 years ago).

On-Demand Marketing

Bosshardt Realty has a commercial grade printer on-site, along with a cutter, slitter, slicer machine that allows us to quickly produce marketing materials. We do not have to take our materials to a third party to have them produced. The cutter, slitter, slicer allows us to make custom full bleed materials including card, brochures, postcards, invitations etc.

Marketers, Not Realtors®

Our marketing team are not Realtors®. Their focus is not split between building their own real estate business and marketing for our company and Realtors®. They are each trained in specific areas of marketing, design and advertising, which allows us to react quickly to the changing needs of our business.

MARKETING STRATEGIES

Bosshardt has an extensive base of marketing. We spend more on marketing than any other real estate company in the Gainesville/Alachuha area. Our marketing strategies are designed for specific areas of real estate ie. commercial, residential, land, etc. Some of the ways we may market a property are:

- 3D virtual tours of properties
- Develop and distribute property brochures
- Install company branded signage on the property
- Send direct mail to targeted buyers
- Network with other real estate professionals
- Announce properties to our 100+ Realtors® at our weekly sales meeting
- Write a marketing narrative and lifestyle story for property, and location
- Exposure to the Gainesville MLS as well as the Stellar MLS
- Properties posted on Leading Real Estate Companies of the World for maximum worldwide viewing.
- Exposure through Loopnet/CoStar, CREXI, Catylist and more for commercial properties
- Property landing pages on our website with 33,953 registered users.
- Exposure through CCIM network of professionals
- Email blasts to local Realtors, and sphere of influence
- Print advertising where necessary
- Professional photography uploaded to the MLS with proper naming conventions to make it more searchable on the internet.
- Properties posted on the Bosshardt's various social media sites
- Targeted digital advertising
- Facebook ads and campaigns
- Facebook live posts
- Activate on MLS and place lockbox on property
- Property flyers and brochures
- Tour with Bosshardt Realtors
- Open houses where applicable
- Bosshardt Blitz (Gainesville's largest open house event)
- Luxury properties may be posted on a Luxury Portfolio International website

Our services may also include contract negotiations, helping secure financing, attending property inspections, coordinating the closing process, and more. We will provide regular updates on the progress of each listing.

SOCIAL MEDIA MARKETING



bosshardtrealty

...



Liked by m00nkiss and 13 others

bosshardtrealty *NEW ON SITE*

Looking for privacy? Need space to spread out? Located in the gated community of Abbey Glen on a one acre lot. Contact Todd Loeffler at Bosshardt Realty to view IRL 352.514.3523

#bosshardtlife #realestatebroker #gainesvillefl #realestate #realestategainesville



SEARCH.BOSSHARDTREALTY.COM

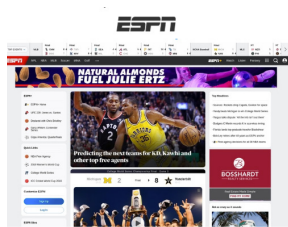
11912 Elm Street, Brooker, FL 32622 (MLS #421640) :: Bosshardt Realty

Save

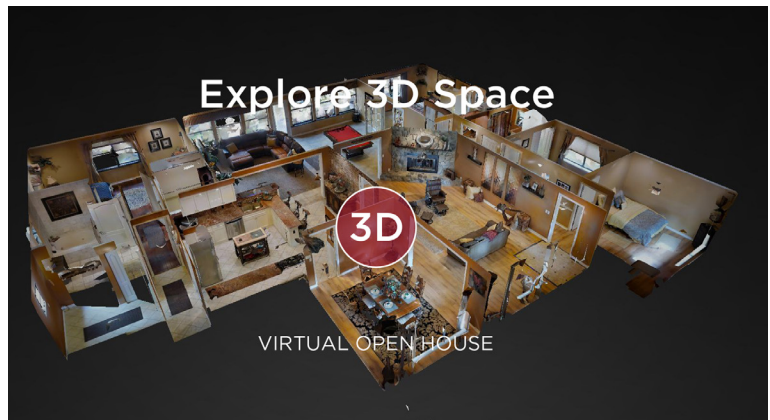


Targeted Digital Ads

Our digital ads can be seen on sites like CNN, ESPN, Facebook, AOL, USA Today, MSN, and more.



3D Tours for home and commercial



Email Marketing

Email blasts to our company of Realtors® (approx. 90) and to our email list of approximately 3000, and to any email address you would like added to our campaigns.

Join us for lunch and chance to win gas card.

[View this email in your browser](#)



BOSSHARDT
— REALTY SERVICES —

Visit **BosshardtRealty.com**
for a current list of all available properties.
5542 NW 43rd Street, Gainesville, FL 32653
352.371.6100

You are invited to an open house luncheon.

Please plan to join us June 26th for lunch and a chance to WIN A \$25 GAS CARD!

11:30am - 2:00pm

6804 NW 37th Drive | \$300,000 | MLS# 422525



Leave your business card for a chance to win a \$25 gift card.

1

Bosshardt Realty sends Adwerx your listing information

2

Adwerx automatically creates a digital advertisement for your listing

3

Your ad runs on Facebook and the web, targeting potential home buyers and sellers

4

Delight your sellers. Send them reporting and they will be automatically shown your listing ad





WHY USE A CCIM?

There are countless benefits to working with a CCIM. Commercial real estate investment requires the counsel of a qualified professional. A Certified Commercial Investment Member provides clients with the assurance that every decision will be made in the best interest of their investment objectives.

When assembling a commercial real estate investment team, start with a CCIM.



CREDIBILITY

CCIM is the most prestigious designation commercial real estate professionals can achieve within the industry. Graduate-level education, coupled with industry-leading technology tools, practical proven experience, and in-depth knowledge of their local markets, gives CCIMs the ability and the credibility to conduct business confidently and successfully. By partnering with a CCIM, you effectively utilize the top-level, most reliable performers in the industry: with an average of 19 years of experience, 70% of CCIM members hold executive-level positions and 90% of members refer clients to other business services. When you use a CCIM, you choose the most credible professional in the business.

COMMUNITY

Today there are CCIMs in every state, across Canada and Mexico, and in more than 30 countries around the world. Domestically, the network encompasses more than 1,000 markets, from large metropolitan areas to small cities and towns. A truly global network, CCIMs are a powerful force in markets large and small. When you use a CCIM, you choose a trusted community of real estate professionals that are consistently sought for their dependability, intelligence, success and confidence.

INTEGRITY

CCIM designees are bound to the strictest ethical guidelines and standards of practice in the industry today. In addition, each CCIM has successfully completed a graduate level program comprised of 160 hours of education. If you ask around the industry, you'll learn that companies and other real estate professionals are more likely to seek out experts who possess the CCIM designation, as they know CCIM stands for trust, knowledge and reliability. When you use a CCIM, you choose experts with integrity.

MEASUREMENT

Overall, CCIM's global network enables members to close thousands of transactions annually, representing more than \$200 billion in value. But closing transactions is only part of what CCIMs can do. In addition to holding deal-making occupations in every property sector, CCIMs are also found in leasing, asset management, development, lending, financing, property management, site selection and corporate real estate positions. So, whatever assistance your real estate project requires, a CCIM can help you achieve a better result. In fact, only 6 percent of all commercial real estate practitioners hold the elite CCIM designation, which reflects not only the caliber of the program, but why it is one of the most respected designations in the industry. When you use a CCIM, you choose a professional who produces measurable results.

The CCIM designation is conferred by the Chicago-based CCIM Institute, a commercial real estate affiliate of the National Association of REALTORS®. Learn more about the value of working with a CCIM.

Call (312) 321-4460, (800) 621-7027 or visit www.ccim.com.

Code of Ethics and Standards of Practice of the CCIM Institute of the National Association of REALTORS®

CCIM DESIGNEES and CCIM Institute CANDIDATES are members of the CCIM Institute (referred to herein as the Institute). Where the term "CCIM Institute Members" is used in this Code and Preamble, it shall apply to both categories of membership.

While the Code of Ethics establishes obligations that may be higher than those mandated by law, in any instance where the Code of Ethics and the law conflict, the obligations of the law must take precedence.

PREAMBLE

Under all is the land. Upon its wise utilization and widely allocated ownership depend the survival and growth of free institutions and of our civilization. Institute members should recognize that the interests of the nation and its citizens require the highest and best use of the land and the widest distribution of land ownership. They require the creation of adequate housing, the building of functioning cities, the development of productive industries and farms, and the preservation of a healthful environment.

Such interests impose obligations beyond those of ordinary commerce. They impose grave social responsibility and a patriotic duty to which Institute members should dedicate themselves, and for which they should be diligent in preparing themselves. Institute members, therefore, are zealous to maintain and improve the standards of their calling and share a common responsibility for its integrity and honor.

In recognition and appreciation of their obligations to clients, customers, the public, and each other, Institute members continuously strive to become and remain informed on issues affecting real estate and, as knowledgeable professionals, they willingly share the fruit of their experience and study with others. They identify and take steps, through enforcement of this Code of Ethics and by assisting appropriate regulatory bodies, to eliminate practices which may damage the public or which might discredit or bring dishonor to the CCIM designation, the CCIM Institute or the real estate profession.

CCIM Institute members having direct personal knowledge of conduct that may violate the Code of Ethics involving misappropriation of client or customer funds or property, willful discrimination, or fraud resulting in substantial economic harm, bring such matters to the attention of the appropriate Board or Association of REALTORS® and the CCIM Institute. (NAR Amended 1/00; CCIM Amended 10/06)

Realizing that cooperation with other real estate professionals promotes the best interests of those who utilize their services, Institute members urge exclusive representation of clients; do not attempt to gain any unfair advantage over their competitors; and they refrain from making unsolicited comments about other practitioners. In instances where their opinion is sought, or where Institute members believe that comment is necessary, their opinion is offered in an objective, professional manner,



CODE OF PROFESSIONAL ETHICS

Introduction

The purpose of this Code of Professional Ethics is to establish and maintain public confidence in the honesty, integrity, professionalism, and ability of the professional real estate manager. The Institute of Real Estate Management and its Members intend that this Code and performance pursuant to its provisions will be beneficial to the general public and will contribute to the continued development of a mutually beneficial relationship among Certified Property Manager® Members, CPM® Candidates, Accredited Residential Manager® Members, Accredited Commercial Manager Members, Associate Members, and other Members, national and international professional real estate associations and organizations, and clients, employers, and the public.

The Institute of Real Estate Management, as the professional society of real estate management, seeks to work closely with all other segments of the real estate industry to protect and enhance the interests of the public. To this end, Members of the Institute have adopted and, as a condition of membership, subscribe to this Code of Professional Ethics.

IREM® Member Pledge

I pledge myself to the advancement of professional real estate management through the mutual efforts of Members of the Institute of Real Estate Management and by any other proper means available to me.

I pledge myself to maintain the highest moral and ethical standards consistent with the objectives and higher purpose of the Institute.

I pledge myself to seek and maintain an equitable, honorable, and cooperative association with fellow Members of the Institute and with all others who may become a part of my business and professional life. I recognize and support the need to preserve and encourage fair and equitable practices and competition among all who are engaged in the profession of real estate management.

I pledge myself to place honesty, integrity, and industriousness above all else and to pursue my gainful efforts with diligent study and ongoing education so that my services shall be beneficial to the general public and my obligations to my clients shall always be maintained at the highest possible level.

I pledge myself to comply with the principles and declarations of the Institute of Real Estate Management as set forth in its Bylaws, Statement of Policies, and this Code of Professional Ethics.

I pledge myself to acknowledge the ethical principles as set forth in the International Ethics Standards established by the International Ethics Standards Coalition of which the Institute is a member.

Article 1. Loyalty to Client, Firm, and/or Employer

A Certified Property Manager®, CPM® Candidate, Accredited Residential Manager®, Accredited Commercial Manager or Associate Member (hereinafter referred to as MEMBER) shall at all times exercise loyalty to the interests of the client and the employer or firm with whom the MEMBER is affiliated. A MEMBER shall be diligent in the maintenance and protection of the interests and property of the employer and of the client. A MEMBER shall not engage in any activity, that could be reasonably construed as contrary to the interests of the client or employer. If an activity would result in a conflict between the interests of the firm or employer and the interests of the client, then the interests of the client shall take precedence.

Article 2. Confidentiality

A MEMBER shall not disclose to a third party any confidential or proprietary information which would be injurious or damaging to a client concerning the client's business or personal affairs without the client's prior written consent, unless such disclosure is required or compelled by applicable laws and regulations.

Article 3. Accounting and Reporting

Pursuant to the terms of the management agreement, a MEMBER shall use reasonable efforts to provide accurate, auditable financial and business records and documentation concerning each asset managed for the client, which records shall be available for inspection at all reasonable times by the client. A MEMBER shall furnish to the client, at mutually agreed upon intervals, regular reports concerning the client's assets under management. A MEMBER shall not exaggerate, misrepresent, or conceal material facts concerning the client's assets or any related transaction.

Article 4. Protection of Funds

A MEMBER shall at all times serve as a fiduciary for the client and shall not commingle personal or company funds with the funds of a client or use one client's funds for the benefit of another client, but shall keep the client's funds in a fiduciary account in an insured financial institution or as otherwise directed in writing by the client. A MEMBER shall at all times exert due diligence for the maintenance and protection of the client's funds against all reasonably foreseeable contingencies and losses.

Article 5. Relations with Other Members of the Profession

A MEMBER shall not make, authorize or otherwise encourage any false or misleading comments concerning the practices of Members of the Institute of Real Estate Management. A MEMBER shall truthfully represent material facts in their professional activities. A MEMBER shall not exaggerate or misrepresent the services offered as compared with the services offered by other real estate managers. Nothing in this Code, however, shall restrict legal and reasonable business competition by and among real estate managers.

Article 6. Contracts

Any written contract between a MEMBER and a client shall be in clear and understandable terms, and shall set forth the specific terms agreed upon between the parties, including a general description of the services to be provided by and the responsibilities of the MEMBER.

Article 7. Conflict of Interest

A MEMBER shall not represent personal or business interests divergent from or conflicting with those of the client or employer and shall not accept, directly or indirectly, any rebate, fee, commission, discount, or other benefit, monetary or otherwise, which could reasonably be seen as a conflict with the interests of the client, employer or firm, unless the client or employer is first notified in writing of the activity or potential conflict of interest, and consents in writing to such representation.

Article 8. Managing the Assets of the Client

A Member shall exercise due diligence in the maintenance and management of the client's assets and shall make all reasonable efforts to protect it against all reasonably foreseeable contingencies and losses.

Article 9. Duty to Former Clients and Former Firms or Employers

All obligations and duties of a MEMBER to clients, firms, and employers as specified in this Code shall also apply to relationships with former clients and former firms and employers. A MEMBER shall act in a professional manner when, for whatever reason, relationships are terminated between a MEMBER and a client and firm or employer. Nothing in this section, however, shall be construed to cause a MEMBER to breach obligations and duties to current clients and firm or employer.

Article 10. Compliance with Laws and Regulations

A MEMBER shall at all times conduct business and personal activities with knowledge of and in compliance with all applicable laws and regulations.

Article 11. Equal Opportunity

A MEMBER shall not deny equal employment opportunity or equal professional services to any person for reasons of race, color, religion, sex, familial status, national origin, age, sexual orientation, gender identity, or handicap and shall comply with all applicable laws and regulations regarding equal opportunity.

Article 12. Duty to Tenants and Others

A MEMBER shall competently manage the property of the client with due regard for the rights, responsibilities, and benefits of the tenants or residents and others lawfully on the property. A MEMBER shall not engage in any conduct that is in conscious disregard for the safety and health of those persons lawfully on the premises of the client's property.

Article 13. Duty to Report Violations

Each MEMBER has a responsibility to provide the Institute of Real Estate Management with any significant factual information that reasonably suggests that another MEMBER may have violated this Code of Professional Ethics. Such information must be presented as outlined in the Institute of Real Estate Management's Bylaws and Statement of Policies.

Article 14. Enforcement

The interpretation of compliance with this Code is the responsibility of the ethics boards of the Institute of Real Estate Management. Any violation by a MEMBER of the obligations of this Code and any disciplinary action for violation of any portion of this Code shall be determined and carried out in accordance with and pursuant to the terms of the Bylaws and Statement of Policies of the Institute of Real Estate Management. The result of such disciplinary action shall be final and binding upon the affected MEMBER and without recourse to the Institute, its officers, Governing Councilors, Members, employees, or agents.

Effective October 12, 2017

Subscribed to by: _____

Date: _____

ADDENDUM NO. 1



City of Gainesville

Budget and Finance Department
Purchasing Division

Addendum Publish Date: June 8, 2020

Real Estate Brokerage Services RFP #: CMGR-200030-GD ADDENDUM NO. 1

Bid Due Date: July 10, 2020, 3:00pm (Local Time)

NOTE: This Addendum has been issued only to the holders of record of the specifications.

The original Specifications remain in full force and effect except as revised by the following changes which shall take precedence over anything to the contrary.

1. Any questions regarding this solicitation shall be submitted in writing to the City of Gainesville Procurement Division by 3:00pm, (local time), Thursday, June 11, 2020. Submit questions to: dykemangb@cityofgainesville.org
2. Please find attached:
 - a. A copy of the Cone of Silence period information (Financial Procedures Manual Section 41-424 Prohibition of lobbying in procurement matters) that was discussed.
 - b. An updated copy of the solicitation schedule
 - c. A copy of the Pre-Bid Discussion/Information Checklist
3. Following is a review of the Pre-Bid Meeting that was held via Zoom Conference on June 4, 2020:
 - a. City of Gainesville Staff represented by Gayle Dykeman, Procurement Specialist III, Erik Bredfeldt, Project Manager, and Kara Brecken, Land Rights Coordinator.
 - b. Gayle Dykeman started the meeting by reviewing important areas of the solicitation, including the solicitation schedule, submittal due date, all communication must go through Gayle Dykeman throughout the duration of the solicitation. All submittals must be entered in DemandStar.com by the due date and time – DemandStar is programmed to reject any bids that are entered after that time. DemandStar is a free tool for vendors to use to submit bids. Briefly discussed the minimum qualifications for consideration. Discussed Living Wage, Local Preference and Small and Veteran Disabled Business incentives. Gayle noted the change in the solicitation schedule – to the “End of Cone of Silence” line only. She pointed out the minimum requirements vendors must meet in order to be thoroughly evaluated by the City’s evaluation team.
 - c. Erik Bredfeldt discussed the details of the scope of work solicitation, which he placed in three (3) buckets, including:
 - i. Sale and disposal of properties
 - ii. Rental property management – 14 properties listed in Attachment D of the solicitation
 - iii. Advice on getting an understanding of the market and how the City can best leverage their real properties

- d. Erik also discussed two major items of import:
 - i. The work requested in the solicitation is intended to be price neutral to the City
 - ii. The work requested in the solicitation is for General Government properties only and does not include GRU properties

Following are questions that were asked in the meeting:

- e. Question: Cost Neutral provision – lease management – sounds like property management. Do the leases the City has provide for the City to pass through management fees to the tenant? (see 2.1 page 5)

Answer: Will review leases and respond via Addendum on DemandStar as soon as possible.

- f. Question: Transaction related fees are customarily paid by the landlord or seller – are you proposing that these fees are amortized into a lease payment or purchase price?

Answer: Will review and respond via Addendum on DemandStar as soon as possible.

- g. Question: When do you anticipate having the answer to these questions?

Answer: As soon as the information has been researched and made available.

Following are questions that were asked after the pre-proposal meeting:

- h. Question: In the past, has a local real estate company been used for the services listed in the Request for proposal?

Answer: Not to staff's knowledge in terms of General Government. As mentioned in the call, staff is aware that GRU has had contracts for real estate services with local firms for a variety of similar real estate services.

- i. Question: What is the approximate annual revenue of the lease portfolio?

Answer: Will review leases and respond via Addendum on DemandStar as soon as possible.

ACKNOWLEDGMENT: Each Proposer shall acknowledge receipt of this Addendum No. 1 by his or her signature below, **and a copy of this Addendum to be returned with proposal.**

CERTIFICATION BY PROPOSER

The undersigned acknowledges receipt of this Addendum No. 1 and the Proposal submitted is in accordance with information, instructions, and stipulations set forth herein.

PROPOSER COMPANY NAME: Bosshardt Realty Service, LLC

SIGNATURE: 

LEGIBLY PRINT NAME: Aaron Bosshardt

DATE: 7/9/2020

PRE-BID DISCUSSION/INFORMATION CHECKLIST

BID NAME: Real Estate Brokerage Services

BID NUMBER: CMGR-200030-GD

PRE-BID DATE: 6/4/2020

- _____ Introduce staff attending meeting – Erik Bredfeldt, Gayle Dykeman
- _____ Sign-in
 - if mandatory, your name must be on sign-in sheet for City to receive bid
 - print information legibly
- _____ Questions/Answers and topics of discussion addressed at the pre-bid will be available through DemandStar.com in future Addendums. There is no cost to the vendor to use all vendor capabilities when bidding on a City of Gainesville solicitation.
 - You can link to Demandstar through the City's website or direct.
- _____ Any questions must be in writing
 - Email to dykemangb@cityofgainesville.org
 - Questions Deadline: 06/11/2020, 3:00pm
- _____ All communication, contact and/or correspondence must be with dykemangb@cityofgainesville.org or Purchasing Division staff.
 - Bidders who have contact with anyone other than Gayle Dykeman or Purchasing Division staff (A/E, department, City elected officials, etc.) will be disqualified.
- _____ Bid Due Date: 07/10/2020 at 3:00PM local time
- _____ Location to receive bids: Demandstar.com.
- _____ Bonds - ☐ YES ☒ NO
 - If no, bring attention to State Statute of \$200,000
- _____ Local Preference – Page 15, 8.1
- _____ Small and Service Disabled Veteran Business Participation – Page 15, 8.2
- _____ Living wage – **Does not apply to this Solicitation**
 - Discuss all forms within bid document
- _____ Addenda
 - Sign sheet included with each addendum and submit with bid
- _____ Bid form must be signed and submitted
- _____ Minimum Requirements (MUST or SHALL)- Be aware of or could be deemed non-responsive and not considered for award. (Page 7)

_____ Bid Information Form- If not bidding, please complete the form and let us know why you are not bidding.

_____ Page 5, 2.2 –p correction of misspelling – Alachua (not Alachau)

ADDITIONAL INFORMATION

Change in the schedule – the Cone of Silence Ends on the date that the award is finalized – City Commission Approval, Department or Procurement approved, finalized award

Real Estate Brokerage Services

CMGR-200030-GD

Revised 6/4/2020

Activity	Day	Date	Time	Location	Comments
RFP for Distribution	Mon	5/25/20		Demand Star	Cone of Silence Begins
Pre Proposal Meeting	Thurs	6/04/20	1:00pm	Zoom	
Deadline for receipt of questions	Thurs	6/11/20	3:00pm		dykemangb@cityofgainesville.org
Deadline for receipt of proposals	Fri	7/10/20	3:00pm	Demand Star	
Oral presentations, if conducted	Thurs	7/30/20	10:00am-12:00pm 3:00pm-5:00pm	Zoom	
Projected award recommendation date	Fri	7/31/20			
Recommendation of Award to City Commission		2-3 weeks			
City Commission, Department or Procurement finalization of Award		TBD			Cone of Silence Ends
Contract Finalization Period		2-5 weeks			
Purchase Order issued		1 day			When fully executed Contract received
Contract Start Date		TBD			When contract is completed & a Purchase Order is in place

**CITY OF GAINESVILLE
FINANCIAL SERVICES
PROCEDURES MANUAL**

41-424 Prohibition of lobbying in procurement matters

Except as expressly set forth in Resolution 170116, Section 9, during the Cone of Silence as defined herein no person may lobby, on behalf of a competing party in a particular procurement process, City Officials or employees, except the Procurement Division or the procurement designated staff contact person. Violation of this provision shall result in disqualification of the party on whose behalf the lobbying occurred.

Cone of Silence period means the period between the issue date which allows for immediate submittals to the City of Gainesville Procurement Division in response to an invitation to bid, or a request for proposal, or qualifications, or information, or an invitation to negotiate, as applicable, and the time that City Officials or the Procurement Division, or City Department awards the contract.

Lobbying means when a person seeks to influence or attempt to influence City Officials or employees with respect to a decision of the City, except as authorized by procurement procedures.

ADDENDUM NO. 2



City of Gainesville

Budget and Finance Department
Purchasing Division

Addendum Publish Date: June 10, 2020

Real Estate Brokerage Services RFP #: CMGR-200030-GD ADDENDUM NO. 2

Bid Due Date: July 10, 2020, 3:00pm (Local Time)

NOTE: This Addendum has been issued only to the holders of record of the specifications.

The original Specifications remain in full force and effect except as revised by the following changes which shall take precedence over anything to the contrary.

1. Any questions regarding this solicitation shall be submitted in writing to the City of Gainesville Procurement Division by 3:00pm, (local time), Thursday, June 11, 2020. Submit questions to: dykemangb@cityofgainesville.org
2. Bids will be publicly opened, via ZOOM, on July 10, 2020 at 3:00pm eastern time. All those attending will be required to register, and their attendance will become a matter of public record.

Zoom access information:

<https://us02web.zoom.us/j/82838893966?pwd=L3FiN3d1NTRQVmRlMXI2eVh6ckZLdz09>

Meeting ID: 828 3889 3966

Password: 8vUFHT

One tap mobile

+19292056099,,82838893966#,,1#,546863# US (New York)

+13017158592,,82838893966#,,1#,546863# US (Germantown)

Dial by your location

+1 929 205 6099 US (New York)

+1 301 715 8592 US (Germantown)

+1 312 626 6799 US (Chicago)

+1 669 900 6833 US (San Jose)

+1 253 215 8782 US (Tacoma)

+1 346 248 7799 US (Houston)

Meeting ID: 828 3889 3966

Password: 546863

Find your local number: <https://us02web.zoom.us/j/82838893966?pwd=L3FiN3d1NTRQVmRlMXI2eVh6ckZLdz09>

3. Please find attached:
 - a. A copy of the Cone of Silence period information (Financial Procedures Manual Section 41-424 Prohibition of lobbying in procurement matters).

4. Following are the answers to questions that were asked in the Pre-bid meeting but not answered in Addendum 1:

- a. (Question e. on Addendum 1) - Question: Cost Neutral provision – lease management – sounds like property management. Do the leases the City has provide for the City to pass through management fees to the tenant? (see 2.1 page 5)

Answer: Based upon a cursory review of the leases staff currently has access to there are provisions for fees generally but not for pass through of management fees to the tenant. Because this is a new endeavor for the City, there are many possible methods and mechanics of payment. The method of payment to the awarded vendor will be discussed during the contract negotiation phase of this solicitation.

- b. (Question f. on Addendum 1) - Question: Transaction related fees are customarily paid by the landlord or seller – are you proposing that these fees are amortized into a lease payment or purchase price?

Answer: Not necessarily. Customary transaction fees normally paid by the Seller would likely continue to be paid by the Seller. See also answer to question “4. A.” above.

- c. (Question I. on Addendum 1) - Question: What is the approximate annual revenue of the lease portfolio?

Answer: Roughly \$900,000 annually

ACKNOWLEDGMENT: Each Proposer shall acknowledge receipt of this Addendum No. 2 by his or her signature below, **and a copy of this Addendum to be returned with proposal.**

CERTIFICATION BY PROPOSER

The undersigned acknowledges receipt of this Addendum No. 2 and the Proposal submitted is in accordance with information, instructions, and stipulations set forth herein.

PROPOSER COMPANY NAME: Bosshardt Realty Services, LLC

SIGNATURE: 

LEGIBLY PRINT NAME: Aaron Bosshardt

DATE: 7/9/2020

**CITY OF GAINESVILLE
FINANCIAL SERVICES
PROCEDURES MANUAL**

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Lake City

352.371.6100