



**REQUEST FOR PROPOSAL (RFP) FOR
PROPERTY MANAGEMENT SERVICES – JOE’S HILL MANOR ESTATE
Specification No. SS2021.0831**

By:

SOCIAL SECURITY BOARD

MINISTRY OF NATURAL RESOURCES, LABOUR AND IMMIGRATION

VIRGIN ISLANDS

All communications must be addressed and returned to:

Jeanette Scatliffe Boynes, Acting Director

Telephone: 1 (284) 852-7820

Email: jboynes@vissb.vg

Social Security Board
Joshua Smith Building
British Virgin Islands VG1110

**PROPOSALS MUST BE RECEIVED NO LATER THAN 4:00 P.M., ATLANTIC
STANDARD TIME, ON 15 OCTOBER 2021**

Request for Proposal

Social Security Board

PROPERTY MANAGEMENT SERVICES
FOR THE JOE’S HILL MANOR ESTATE

Executive Sponsor		
Jeanette Scatliffe Boynes	jboynes@vissb.vg	(284) 852-7820
Signature		Date

Procurement Officer		
Lecia Clercent	lclercent@vissb.vg	(284) 852-7897
Signature		Date

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Everette E. Frazer	efrazer@vissb.vg	(284) 852-7804
Signature		Date

Finance Officer		
Lorie Freeman	lfreeman@vissb.vg	(284) 852-7850
Signature		Date

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1. GENERAL INFORMATION

1.1 Introduction.

The Social Security Board (SSB) seeks proposals from qualified and experienced individuals or firms (the “Bidder”) to provide Property Management Services for the Joe's Hill Manor Estate.

1.2 Query Handling.

Queries concerning this proposal should be addressed to:

Jeanette Scatliffe Boynes
Acting Director
P.O. Box 698
Road Town, Tortola VG1110 Virgin Islands
Tel: (284) 852-7827
Email: jboynes@vissb.vg

Note: Queries sent to other parties will not be accepted and could be interpreted as canvassing, e.g., as endeavoring to gain inside information about the procurement effort.

1.3 Expected Timeline.

- RFP issued on 3 September 2021
- Deadline for submission 15 October 2021

1.4 Terms and Conditions.

The SSB invites sealed proposals for the Property Management of the Joe’s Hill Manor Estate. All proposals submitted shall meet the following terms and conditions:-

- Bidders shall deliver their proposal to the office of SSB, Joshua Smith Building, Road Town, Tortola VG1110 Virgin Islands.
- The proposal shall be submitted in a sealed envelope, and on the outside of the envelope shall be marked, "**PROPERTY MANAGEMENT SERVICES: JOE'S HILL MANOR ESTATE.**" It is the sole responsibility of the Bidder to see that the bid is received on time.
- Any Bidder may withdraw their proposal by written request before the scheduled closing date for receipt of the proposal.

- All proposals submitted shall include a complete "Proposal". The services performed under this contract must conform to the requirements which are outlined in Section 6 of this RFP.
- The contract will be awarded to the Bidder whose work will best meet the requirements of the SSB. The SSB reserves the right to reject any and all proposals.
- Proof of valid documentation should be submitted with the Proposal: i) Certificates of Good Standing from a) the Inland Revenue Department; b) the SSB (including the National Health Insurance); and c) the Commercial Registry, and ii) a Trade Licence.
- All technical questions concerning the management specifications, the bid process, and general information should be directed to Mrs. Jeanette Scatliffe Boynes, Acting Director of the SSB; email jboynes@vissb.vg.

1.5 Addenda to the Request for Proposal.

If it becomes necessary to revise any section of this RFP, an addendum will be provided to all Bidders who have submitted a proposal.

1.6 Acknowledgment of Receipt.

SSB must confirm in writing that they have received the proposal documents within three (3) days of receipt.

1.7 Late Proposals.

Proposals received after the deadline will not be accepted by the SSB.

2. EXECUTIVE SUMMARY

2.1 Background.

The Joe's Hill Manor Estate is a housing community designed on the hillside under Joe's Hill facing the Long Bush and wider Road Town area. The Estate includes residential units targeting first-time homeowners and commercial space and serves as the beginning of the SSB's First-time Homeowners' Program.

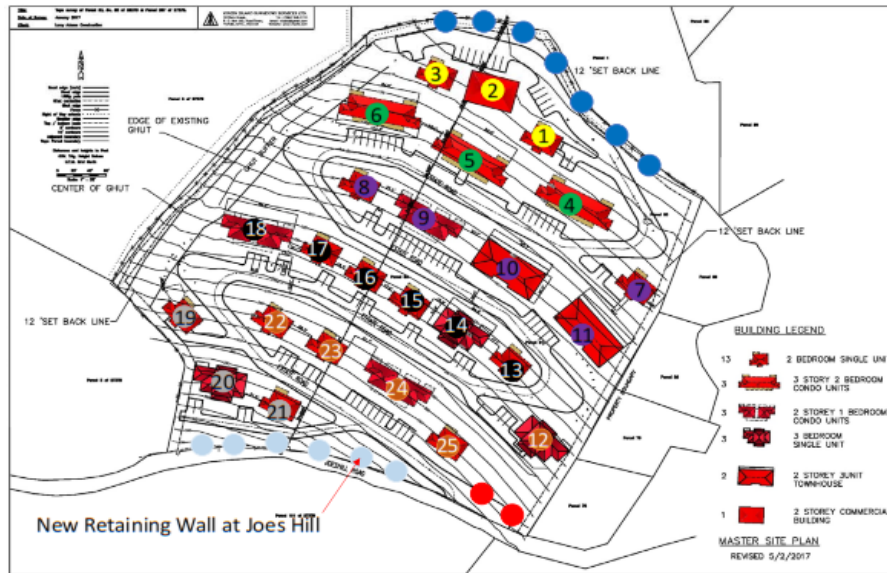
SSB is developing just over seven acres of land, Road Town Registration – Block 2837D – Parcel 90, to construct twenty-five (25) buildings, comprising fifty-two (52) residential units (of a mix of one, two, and three bedrooms) and commercial space. A contract totaling Seventeen million, nine hundred and thirty-nine thousand, one hundred and four dollars and thirty-two cents (\$17,939,104.32) was signed between SSB and James Todman Construction Ltd. to execute the works on the Joe's Hill property.

The contracted time for the Estate, which commenced on July 1, 2020, is 1275 whole days or roughly 3.5 years to complete in its entirety.

Below is a synopsis of the structures to be erected on the property:

UNITS	HOUSING OPTION
6	1-Bedroom Condo
18	2 Bedroom Condo
6	2 Bedroom Split Level Condo
13	2 Bedroom House
3	3 Bedroom House
2	2 Bedroom Townhouse
4	3 Bedroom Townhouse
52	Total
1	3-Storey Commercial Bldg.

Included below is a Site Plan showcasing the location of all units within the Estate.



2.2 Objective.

The SSB is soliciting proposals for a full-service property management company to manage the SSB-owned property located at Joe’s Hill, Road Town, Tortola, which comprises 52 residential units and one commercial building, as described in Section 2 of this RFP. The contract will be for a period of three (3) years.

3. SCOPE OF SERVICES

3.1 Project Description.

The Bidder shall thoroughly examine and become familiar with all parts of this RFP requirements and specifications, the nature and scope of the work detailed, and all regulations of this RFP.

Professional services are required, and the SSB is not precluded from considering a submitted price once satisfied that the Bidder has the proven competence and relevant qualifications. The selection for professional services will be based on the contractor's exhibited experience and the professional qualifications necessary for the satisfactory performance of the services required.

3.2 Description of Services.

The Contractor will perform, but not be limited to, all property management services consistent with recognized and standard principles:-

- Maintaining common areas, security/CCTV systems, horticulture/landscaping, and pest control.
- Collecting dues and related fees.
- Setting the budget for items for which the Contractor has responsibility.
- Handling emergencies.
- Procuring property insurance.
- Provide reports/statements quarterly or upon request for the property indicating income charged for services, what those services are, and a budget for unit/property maintenance.
- Perform and record an annual inspection of property in compliance with applicable laws. Building Code. Be responsive to inspections from government and insurance entities and all other required inspections.
- SSB reserves the right to request further information from the chosen Contractor.

3.3 Common Reporting.

Provide accurate and timely reports to SSB that may include:

- Balance Sheet, Income Statement, and Operating Statements (quarterly)
- Accounts Receivable (quarterly)

- Accounts Payable (quarterly)
- Schedule of Disbursements and Receipts (quarterly)
- Vacancy reports and Collections activity (quarterly)
- Police / Incident Reports (quarterly)
- Maintenance and Preventative Maintenance Reports, as needed
- Current and pending Legal Matters (quarterly)
- Fiscal Year-End Reports and other support for the annual audit
- Other requested reports

3.4 Management Service for Revitalization.

Routine contracted services will include, but not be limited to the following:

- Exterior Landscape Maintenance
- Trash/Recycling Removal
- Custodial Services
- Pest Control
- Maintenance
- Security
- Plumbing Maintenance
- Electrical Maintenance
- Parking Lot Management Services to include policing and towing of unauthorized vehicles
- Parking Lot Maintenance

4. SITE VISIT

Interested Bidders should contact SSB's Investment Manager for an on-site tour. Please email efrazer@vissb.vg to request a walk-through. The visit will be facilitated in conjunction with the Construction Project Manager, STO Enterprise Ltd.

5. SCHEDULE OF COST

5.1 Payment Arrangement.

- SSB will award the contract based on a fixed price. Therefore, proposals should state a total fixed cost for providing all the required services.
- Proposals MUST confirm that the quoted cost is valid for 120 days after the closing date for receipt of tenders.

5.2 Management Fee.

- Provide a quarterly property management service fee offered to fulfill the Scope of Services as outlined in Section 3 of this RFP.

- If there is a specific service that the company provides that has not been stated in the Scope of Services but will be included as a service in the specified fee; or if there is a service within the scope of services that will not be covered by the quarterly service fee proposal, please explain.
- Costs shall include incidental expenses related to completing the Scope of Services outlined in this RFP.
- The proposed fee structure must be broken down for the extent of the duration of the contract.
- All costs must be itemized.

6. SPECIFICATION OF REQUIREMENTS

The submitted proposal should include qualifications for the services and experience. The proposal must include a detailed description of the following:

Scope	Description
Qualifications, Knowledge, and Experience	<ul style="list-style-type: none"> ▪ Summarize your firm’s qualifications, experience, and special expertise in providing the type of services identified in the project description, include resumes of key personnel. ▪ Working knowledge of building codes. Strong familiarity with Building Authority and its processes ▪ Knowledge of local housing policies and programs. ▪ Property Management Certification or the equivalent earned by the individual responsible for the day-to-day management of the site.
Project Approach	Provide a brief overview of your property management philosophy, methods, and practices and how they would meet the needs identified in the requested services section.
Communication	Describe how communication and reporting would occur between your firm, the tenants, and the SSB.
Pricing Methodology	Provide base property management fees expressed as a fixed monthly fee for property management services. Any additional fees (above the fixed fee) should be itemized as a separate line item and priced as a cost reimbursement plus administrative markup with the markup identified.
References	Include a list of references (including contact names, telephone numbers, and email addresses) of at least three (3) recent or current properties managed by your firm.
Company Details	Proposals must include a Certificate of Incumbency, Register of Directors or other evidence confirming the name of the person(s) with authority to make decisions which legally bind the company together with the official name under which the business of the company is conducted, the physical and mailing address and other pertinent contact details. Proposals MUST ALSO BE SIGNED by a person duly authorized to bind the company, partnership, or corporation submitting the proposal and also indicate the place and date of incorporation and provide evidence that the company/corporation is in good standing with the Registry of Corporate Affairs or other such entity.

7. PERFORMANCE HISTORY

Provide a list of properties managed during the past five (5) years. Provide the following for each property: -

- The property owner(s) name and address.
- Address of the property(ies) and the names.
- The total number of units.
- Indicate the date that the company started managing the property(ies) and the date the contract (s) ended, including the reason for ending the management contract(s).
- Indicate whether the property owner(s) can be contacted for references.

8. EVALUATION AND SELECTION PROCESS

8.1 General.

Following the submission of proposals, the SSB will review the documents submitted, call references and others who have worked with your firm, and evaluate the proposals through a review committee. Bidders may be asked to follow up with oral presentations.

The SSB intends to select the firm that presents the best combination of experience, capacity, and value. All proposals will be evaluated individually on the qualifications and experience of the Bidder. The evaluation will consist of a qualitative review of the proposal to determine how it meets the minimum requirements. Upon completion of the proposal evaluations for all Bidders, the price proposals will be analyzed. The proposals, which have a reasonable chance of being selected for award, will be considered in the "Competitive Range." SSB may request that Bidders whose proposals are in the Competitive Range make oral presentations concerning their proposals to the SSB Evaluation Committee.

MANDATORY REQUIREMENTS		
NAME OF COMPANY:		Y/N
1.	The proposal came in by the submission deadline.	
2.	Proposal form in RFP was used; all information was included; all questions have been answered; the firm's authorized representative has signed the proposal; proposal complies with all RFP instructions.	
3.	Property management approach: the company's process for taking on new clients and handling emergencies during and after business hours.	
4.	The company is carrying or has indicated that it will get the minimum required insurance.	
5.	Company currently manages properties numbering at least 10 residential units.	

NAME OF COMPANY:			SCORES
No.	EVALUATION CRITERIA	WEIGHTING	RATING
1.	Company profile	15	
2.	Company staffing and capacity to complete requirements (the experience, qualifications, and general suitability of key personnel).	15	
3.	Compliance/responsiveness/suitability of the proposal	10	
4.	Price/Cost Proposal	30	
5.	Building maintenance experience	20	
6.	Experience and past performance on similar projects in scope in the BVI	10	
Total		100	

8.2 Award of Contract.

The contract shall be awarded to the Bidder submitting the most responsive proposal, price, and other factors considered, complying with the specifications contained herein, provided the proposal is in the best interest of the SSB to accept. The SSB is therefore not bound to accept a proposal based on the lowest quoted price alone. The SSB will notify the Bidder to whom the award is made at the earliest date possible.

8.3 Contract Execution.

After the award, or such period as the parties may agree, the successful Bidder shall execute and deliver to SSB the signed Agreement. The RFP and any written correspondence will become part of the contract and shall be incorporated therein by reference.

8.4 Response Material Ownership.

The information submitted in response to the RFP becomes the property of SSB and will be returned to the Bidder only at the SSB's option. The SSB has the right to use any or all ideas presented in reply to this request. Disqualification of a Bidder does not eliminate this right.

8.5 Acceptance of Proposal Content.

The contents of the proposal of the successful Bidder may become contractual obligations if SSB wishes to execute a contract based on the submitted proposal. Failure of the successful Bidder to accept these obligations in a contract may result in the cancellation of the award.

8.6 Confidentiality of Evaluation.

The SSB will not disclose information relating to the examination, clarification, evaluation, and comparison of proposals to other Bidders or other external individuals. Confidential information shall not be disclosed at any time.

8.7 Interference.

Any effort by the Bidder to influence the Evaluation Committee during the examination, clarification, evaluation of proposals, and contract award shall result in disqualification. If any Bidder offers or attempts to offer gifts, inducements, or gifts to secure the contract, SSB shall reject the proposal or cancel the contract, and make a report to the relevant authorities.

8.8 Contract Termination.

The SSB shall terminate the contract in the event of the successful Bidder's failure to comply with any of the contractual terms and conditions and shall be entitled to recover from the Bidder any loss resulting from such termination.

8.9 Questions from Bidders.

Any question received from a Bidder, together with SSB's response, will be circulated to all Bidders, maintaining the anonymity of the inquirer.

8.10 Cost of Preparation of Proposal.

The SSB will not be held responsible for any expenses or losses incurred by the Bidder in preparing the proposal. The Bidder shall bear all costs associated with the preparation and submission of their proposals.

8.11 Discussions with Bidders.

The SSB may conduct discussions with shortlisted Bidders to:

- Explore the SSB's requirements and the Bidder's proposal.
- Facilitate arriving at a contract that will be most advantageous to the SSB, taking into consideration price and other evaluative factors. Bidders whose proposals are unacceptable will be notified promptly.

8.12 Conflict of Interest.

The successful Bidder must declare any potential conflict of interest between providing the requested services and other activities in which they, a member of their group(s), or any expert proposed in their offer, is engaged. SSB will examine conflicts of interest on a case by case basis.

8.13 Compliance with the Applicable Law.

The Bidder(s) agrees, upon successful contract award, that the contract and the services provided thereunder will be subject to all the applicable laws and regulations of the Virgin Islands.

8.14 Amendments to the Request for Proposal.

The SSB will publish any amendment(s) to this RFP and will email such amendments to all known Bidders, who MUST acknowledge receipt.

8.15 Sub-contractors.

The role of sub-contractors must be made clear in the proposal. The successful Bidder will be wholly responsible for the statutory and reporting requirements of the sub-contractors, The SSB shall not be responsible or liable for any failure to comply by the Contractor or any subcontractor.

8.16 Indemnities and Sureties.

Before the contract commences, the successful Bidder shall take out an insurance policy indemnifying itself and SSB in relation to all claims. Proof of coverage shall be provided to the SSB.

9. GENERAL CONDITIONS OF THE RFP

- The SSB reserves the right to reject any and all proposals, waive any informality, request interviews of Bidders before award, and select and negotiate the professional services in the organization's best interest.
- The Bidder shall guarantee that they are able to perform the services offered and the total price of the proposal for a period of not less than 120 days from the date of contract signing or the sale of the first home, whichever is later.
- SSB reserves the right to accept all or part of any proposal and negotiate a contract for services and cost with the selected Bidder.
- The Bidder shall provide all necessary personnel, material, and equipment to perform and complete all work under this proposal.
- SSB intends to award a contract for the requested services within 120 days of the closing date on the receipt of the proposals, if possible, with the services to commence upon the issuance of a Commencement Notice issued under the contract.
- Unless otherwise specified, all costs listed are for the term of the contract.

10. DISPUTE RESOLUTION

In the event of a dispute between the parties concerning any matter arising from or connected with this Agreement, the parties shall use reasonable efforts to settle the dispute through negotiations conducted in good faith between the parties.

If the dispute is not resolved through negotiations, the parties shall attempt to resolve the dispute by mediation with a mediator to be appointed by the mutual agreement of the parties.

If the dispute is not resolved through mediation within twenty-eight (28) days of initiation of the procedure or such extended period as the parties may agree, the dispute may be referred to the courts under the laws of the Virgin Islands.

11. LOGISTICS AND TIMING

11.1 Submission of Questions or Request for Clarifications

- Bidders must communicate only with the SSB regarding this RFP.
- All questions or requests for clarification must be submitted to the following email address: jboynes@vissb.vg.
- The subject line of the email must indicate that the contents are: “*Questions and Requests for Clarification*” about the RFP and must refer to “*Request for Proposal (RFP) for Property Management Services for the Joe's Hill Manor Estate, Specification No. SS2001.0831.*”
- The specification number must appear in the subject line of the email.
- No telephone calls will be accepted.
- All questions and requests for clarifications must be submitted no later than 4:00 pm, Eastern Standard Time, on 17 September 2021, or no response will be provided.

11.2 Closing Date for Receipt of Proposal

Proposals shall be submitted to the SSB by 4:00 p.m. on 15 October 2021.

- To be assured of consideration, proposal responses must be received by SSB no later than 4:00 pm Eastern Standard Time on 15 October 2021.
- The SSB will not accept responses delivered after the established deadline stated above.
- If the response is delivered after the established deadline, a Bidder shall be deemed non-responsive to the solicitation requirements.

The SSB intends to contact Bidders by 30 November 2021.

11.3 Project Timetable

The timetable for the RFP is summarized below. Note that these are target dates and are subject to change by the SSB.

Advertisement of Request for Proposals	3 September 2021 4:00 pm
RFP Questions and Clarification Deadline	17 September 2021 4:00 pm
Deadline to submit Expressions of Interest	15 October 2021 4:00 pm
Pre-qualified Selection:	20 October 2021 4:00 pm
Response to RFP:	22 October 2021 4:00 pm
Evaluation of Proposal	29 October 2021 4:00 pm
Due Diligence	12 November 2021 4:00 pm
Vendor Selection & Contact	30 November 2021 4:00 pm
Project Kick-off	1 February 2022 4:00 pm

12. BID PROPOSAL FORM

PROPERTY MANAGEMENT – JOE’S HILL MANOR ESTATE

I/We _____, the undersigned, do hereby propose to furnish the Social Security Board, a Property Management Proposal, in accordance with all terms and specifications contained herein:

Attached are **three (3)** copies of the proposal package.

Name of Company	
Contact Person and Title	
Signature	
Address	
Phone Number(s)	
Email Address	

References: List at least three (3) recent or current properties managed by your company within the last four (4) years where same/similar services, as stated herein, have been provided.

Reference No. 1

Property Name	
Owner’s Name	
Contact Person and Title	
Address	
Phone Number(s)	
Email Address	

Reference No. 2

Property Name	
Owner's Name	
Contact Person and Title	
Address	
Phone Number(s)	
Email Address	

Reference No. 3

Property Name	
Owner's Name	
Contact Person and Title	
Address	
Phone Number(s)	
Email Address	