Wake Forest Baptist Medical Center
Office of Strategic Sourcing

REQUEST FOR PROPOSAL (RFP)

For provision of

BROKERAGE REPRESENTATION SERVICES

For

WAKE FOREST BAPTIST MEDICAL CENTER

DEADLINE: TUESDAY, DECEMBER 11, 2012 3:00 PM EST

Wake Forest Baptist Medical Center
Office of Strategic Sourcing
Medical Center Boulevard
Winston-Salem, NC 27157

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WAKE FOREST BAPTIST MEDICAL CENTER

A. SCOPE OF REQUEST

Wake Forest University Baptist Medical Center, a nonprofit North Carolina corporation, herein referred to by the corporate trade name of Wake Forest Baptist Medical Center (WFBMC), is one of the nation's preeminent academic medical centers. It is an integrated health care system that operates 1,004 acute care, rehabilitation and psychiatric care beds, outpatient services, and community health and information centers. The Medical Center has 21 subsidiary or affiliate hospitals and operates more than 120 outreach activities throughout the region, including satellite clinics, health fairs, consulting services, and medical director services. It provides a continuum of care that includes primary care centers, outpatient rehabilitation, and dialysis centers. Although its primary service area is a 24-county region in northwestern North Carolina and southwestern Virginia, Wake Forest Baptist in the year ending June 30, 2010, served patients from 96 (of 100) North Carolina counties, all 50 states, the District of Columbia, and several foreign countries.

On July 1, 2010, Wake Forest Baptist became a legally integrated Medical Center. Under this structure, WFBMC (through its Board and consolidated management team) operates all aspects of Wake Forest Baptist Medical Center (also known as North Carolina Baptist Hospital) and Wake Forest School of Medicine (also known as Wake Forest University Health Sciences).

The system's main components are: a. Wake Forest School of Medicine; b. Wake Forest Baptist Health, the integrated clinical operations that includes Lexington Medical Center, Davie Hospital, Brenner Children's Hospital, physician practices, and other clinical facilities; and c. the Piedmont Triad Research Park, which includes downtown research offices and facilities.

WFBMC is a member of the Novation/UHC Group Purchasing Organization (GPO) but also negotiates locally when appropriate.

More information about WFBMC can be found at http://www.wakehealth.edu

B. ENTITIES TO BE COVERED BY PROPOSAL

For purposes of this document, WFBMC is defined primarily by the list of entities below. WFBMC requires that equivalent service and financial programs be offered to all entities. Respondents are expected to thoroughly explain in their proposal any exemptions or modifications requested to this requirement.

- North Carolina Baptist Hospital
- Brenner Children's Hospital
- Wake Forest School of Medicine
- Wake Forest University Health Sciences
- Wake Forest University Physicians
- Lexington Memorial Hospital
- Davie County Hospital
- Wake Forest Baptist Health Community Physicians

C. OBJECTIVE OF REQUEST FOR PROPOSAL

WFBMC is requesting proposals from qualified vendors for brokerage representation services for a potential transaction in the Piedmont Triad region:

(1) 100,000-125,000 square foot warehouse facility

D. GENERAL INFORMATION

All respondents are expected to thoroughly review and conform to the specifications outlined in this Request for Proposal (RFP). Failure to do so is at the respondent's sole risk. It is the responsibility of the respondent to ask questions, request changes or clarifications, or otherwise advise of any language, specifications, or requirements that appear to be ambiguous, contradictory, or arbitrary**. All submitted proposals must meet or exceed the mandatory specifications listed herein**.

E. RIGHTS RESERVED BY WFBMC AND RESTRICTIONS ON RFP PROCESS

WFBMC reserves the right to reject any or all proposals or any part thereof. WFBMC, in its sole discretion, reserves the right to waive any irregularity or minor variance in any proposal received, including but not limited to obvious mathematical errors in extension of pricing, failure to date the proposal, or failing to execute any certification not considered salient to price, delivery or acceptance of an agreement award.

WFBMC will not pay for any information requested nor is it liable for costs incurred by the respondent in responding to this request. Elaborate proposals (e.g. expensive artwork) beyond that sufficient to present a complete and effective proposal are not necessary or desired.

Any discussion with WFBMC personnel, other than as listed as authorized contacts herein, regarding this RFP while the RFP is in progress (from the time Respondent receives this RFP until final award is made) is strictly prohibited. Such contact and discussion may result in disqualification of respondent's proposal.

WFBMC is the sole owner of all data and information contained within the RFP document and accompanying attachments. Respondent shall use this information exclusively to prepare a proposal. Respondent should not disclose this information to any other firm or use it for any other purpose unless required by law or legal process.

F. QUESTIONS OR CLARIFICATIONS

Any and all questions or clarifications regarding specifications, requirements, or the RFP process, should be directed solely to William Brewer, Director, Strategic Sourcing via email at btbrewer@wakehealth.edu. Submit RFP **questions** by **Tuesday, December 4, 2012 at 3:00 PM EST** . Responses to questions will be answered via e-mail, and a copy of the response will be sent to all vendors solicited in the RFP.

G. PARTICIPATION IN RFP -- RESERVED

H. PROPOSAL TERMS

Each respondent is responsible for ensuring that their bid is received at or prior to the date and time specified within this bid. Failure to meet the proposed due date and time shall be grounds for rejection.

A respondent may withdraw or modify its proposal prior to the submission deadline. Proposals submitted prior to the submission deadline may be modified or withdrawn only by written notice to WFBMC. Respondent may change or withdraw their proposal at any time prior to the submission deadline; however, no oral modifications will be permitted. Any modification to a proposal shall be contained in a sealed envelope, clearly marked with the RFP title and "Modification of Proposal" notation.

Proposals may not be withdrawn for a period of 30 days following the closing of the RFP on **Tuesday, December 11, 2012 at 3:00 PM EST**.

All proposals must be valid for at least 180 days from the due date.

I. ADDITIONAL TERMS AND CONDITIONS

Contract Terms and Conditions, beyond those specified in the Requirements section(s) of this document, are not set forth. Respondent is invited to propose additional Terms and Conditions of a final contract. These terms will be subject to review and modifications (as approved by both parties) once proposals are received. Respondent will be permitted to withdraw their proposal should parties not arrive at mutually agreeable terms.

Submitted RFP response (subject to negotiated revisions) should be expected to be referenced in a final executed agreement. All statements, promises, and guarantees made in this RFP are considered binding and may be incorporated into a final mutually signed agreement (should such an agreement be reached).

J. REVIEW OF PROPOSALS

WFBMC intends to partner with a single vendor for brokerage services for the referenced transaction. The awarded vendor will offer WFBMC the best financial and service package in response to the requirements contained herein. WFBMC reserves the right to select among the proposals offered or to make no award under this document, as determined most beneficial for WFBMC.

All proposals submitted shall become property of WFBMC and will remain confidential.

In considering the proposals submitted by each respondent, WFBMC will consider the following at a minimum and as applicable: the ability, capacity, and skill of the respondent to perform; the character, integrity, and quality of respondent; the quality of past performance by respondent; and the competitiveness of the respondent's financial proposal.

WFBMC reserves the right to make the final decision on its choice of proposals. Appeals will be considered on a case-by-case basis; however, the final selection of vendors rests solely with WFBMC.

K. PREPARATION AND RETURN OF PROPOSALS

Respondents must review this RFP and reply with a formal signed proposal. **ATTACHMENT A** must be submitted with the proposal and signed by a duly authorized representative of the respondent's organization. Responses are due no later than **Tuesday, December 11, 2012 at 3:00 PM EST**. Proposals must be submitted in a sealed envelope/package and mailed to the address below. Proposals may also be hand carried to the Office of Strategic Sourcing located at Wake Forest Baptist Medical Center, Piedmont Plaza II, 7th floor, Suite 702.

Wake Forest Baptist Medical Center
Office of Strategic Sourcing
ATTN: William Brewer
Medical Center Boulevard
Winston-Salem, NC 27157

It is the sole responsibility of the respondent to ensure the on-time delivery of all RFP responses. Delays due to shipping errors or delays will **not** be considered acceptable rationale for an untimely reply. These RFP responses may be refused at the discretion of WFBMC.

Respondent must submit **two (2) separately bound hard copies of your proposal and one (1) electronic copy (CD or flash drive)** to include, at minimum, the item(s) listed below. These items **must** be included in your proposal and submitted as a part of your response, no later than **Tuesday, December 11, 2012 at 3:00 PM EST.**

1) Detailed responses to section P, along with any supporting documentation.
2) Detailed responses to section Q, along with any supporting documentation.
3) Detailed description of your firm's fee structure upon which you are bidding.
4) Attachment A, signed by a duly authorized representative from respondent's organization.
5) Attachment B, providing at least three (3) customer references which we may contact. References must include the name of the company/entity, length of service, contact person, and present address and phone number

L. FORMAT OF PROPOSAL

Greater detail, information, and supporting detail assists in the evaluation of responses. **Elaborate format and binders are neither necessary nor desired**. Legibility, clarity, and coherence are more important. It is mandatory that each respondent provides responses in the same numbering format as used in this RFP, so that responses correlate to the same section in the RFP requirements. This will make the proposal more "evaluator friendly" to the team conducting the evaluation of the proposals.

M. PRE-PROPOSAL MEETING – RESERVED

N. DESCRIPTION OF SERVICES TO BE PROVIDED

WFBMC is seeking brokerage representation services for a potential transaction in the Piedmont Triad region of North Carolina. The transaction is to include:

(1) 100,000-125,000 square foot warehouse facility

Vendor is to respond with their interest in providing representation to WFBMC for this transaction. Please respond specifically to the questions and qualifications listed in section P and Q of this RFP.

O. DEFINITIONS - RESERVED

P. RESPONDENT QUALIFICATIONS AND OVERVIEW

Respondent is to provide detailed responses and supporting detail for each of the qualifications listed below. The purpose of this section is to determine the ability of the respondent to perform services described herein. Respondent shall describe and offer evidence of their ability to meet each of the qualifications or statements listed below:

1. Provide an executive summary of organization, including: an overview of your core services, organization structure, years of experience, and any other additional available services that may benefit WFBMC.

2. Identify the brokers to be assigned to the transaction, including a brief resume demonstrating their work experience.

3. Provide a list of geographical regions serviced by your organization.

4. Identify any listings of your firm for properties that might be considered. Describe your firm's approach to any potential conflict that might arise.

5. Identify, to the extent possible, the integrated university/healthcare customers that you currently serve nationally and in the Piedmont Triad region.

6. Describe your firm's willingness to reduce WFBMC's transaction costs via savings or fee participation.

Q. BID REQUIREMENTS AND SPECIFICATIONS

The following are the individual requirements that WFBMC **requires** from the awarded vendor. Please provide a response to each specification and explain how you will achieve this requirement. Products or

services that are not provided as core to the offering (no additional cost) must be specifically indicated as such and associated pricing provided.

1. Vendor is required to report immediately to WFUBMC any activity that might affect the business relationship between your company and WFBMC (i.e. any material claims or federal/state exclusions which may adversely affect vendor's ability to provide the goods or services required by this RFP). Include any pending litigation, for or against your company.

   Meets Specification? ☐ YES ☐ NO
   Explain:

2. Vendor may not assign any Agreement/Contract entered into between WFBMC and Vendor without prior notice and written approval.

   Meets Specification? ☐ YES ☐ NO
   Explain:

R. ADDITIONAL VENDOR OFFERINGS

Please provide any additional offerings that would increase the value of our relationship through improved services or reduced costs to WFBMC (include fee-for-service and no additional charge offerings).

ATTACHMENT A
RESPONDENT SIGNATURE FORM

The form below must be signed by a duly authorized officer of respondent and must accompany your proposal. Signature below provides your guarantee that all statements made in your proposal are accurate and being offered without obligation or other pre-condition to Wake Forest Baptist Medical Center.

Authorized Signature: _____ Date: _____

Printed Name: _____

Title: _____

Company Name: _____

Mailing Address: _____

Telephone: (_____) ____-_____ Email: _____@_____

Licensed to do business in the State of North Carolina? ☐ YES ☐ NO

Is your business listed on the Office of Inspector General's (OIG) List of Excluded Individuals / Entities? ☐ YES ☐ NO

ATTACHMENT B
LIST OF REFERENCES

List three (3) references to which you have supplied products/services within the last three (3) years.

Organization Name: _____

Address: _____

Contact Person: _____

Contact Telephone: _(_____)____-_____ Contact Email: _____@_____

Time period services provided:
Description of services provided:

Organization Name: _____

Address: _____

Contact Person: _____

Contact Telephone: _(_____)____-_____ Contact Email: _____@_____

Time period services provided:
Description of services provided:

Organization Name: _____

Address: _____

Contact Person: _____

Contact Telephone: _(_____)____-_____ Contact Email: _____@_____

Time period services provided:
Description of services provided:

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END OF DOCUMENT

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