



LEASING PROPOSAL REQUEST

Agency, Office Name	Department of Revenue (DOR)
Principal Use Office/Warehouse/Other	Office
Employee Headcount at Premises	41
Transaction Number	21-04-910

	Desired	Alternates Accepted
Service Area and Boundary Requirements	Within Shelby County. Preference to be East of I-240	NO
Parking Requirements	32 free, paved, lighted & striped spaces requested. The parking provided shall include handicap parking to meet the relevant code requirements.	Yes
Usable & Rentable Contiguous Square Footage	6,600 – 7,300 USF* 7,300 – 8,000 RSF *Usable square footage does not include restrooms, mechanical rooms, janitor closets, telecom closets or vestibules.* Proposals submitted with a squarefootage with a 10% deviation (up/down) will be considered an “Alternate” and may be rejected. The State intends “contiguous” to mean space that is adjacent including floors below or above. The actual square footage will be determined by programming and space planning.	Yes
Special Buildout and Other Specifications	Turnkey buildout in accordance and in conjunction with Schedule 1, 2 & 3 and Pro Forma Lease Template including, Exhibit D. All final design work is subject to State and Agency approval after lease is executed. Schedule 1: Space Needs Analysis and Space Summary Sheet Schedule 2: Transaction window Schedule 3: Lease Commission Agreement All State leased offices are required to obtain State Fire Marshall approval or waiver which is the Lessor’s Duty to Obtain and Furnish to the State.	No
Term Length	Ten (10) years	Yes

Commencement Date	Within 18 months of lease execution or sooner in accordance with Lease, Exhibit A, 19 & 20	Yes
Termination Options	Termination for Convenience: 90 day per Block 6 of Lease. Termination for Cause: see Lease - Exhibit A, Paragraph 5.	Yes
Terms and Conditions	As set forth in Pro Forma Lease. A copy of the Pro Forma lease form can be found by visiting www.tn/pr.gov . Any comments to the Lease Template are required with submission of the lease Proposal Quotation Form.	No
Utility, Services and Other Costs	Preference is for FULL Service with no pass through. However, MODIFIED GROSS basis may be proposed with Tenant responsible for payment of utilities and/or janitorial only. <i>NOTE: Utilities must be separately metered for consideration of modified gross lease.</i>	Yes

Communications:

Interested parties must direct all communications regarding this procurement to the RFP Coordinator who is the State's official point of contact. Email is the preferred form of communication.

Name: Stacey Nelson
Phone Number: 615-917-2890
Email: RFP.Coordinator@tn.gov

Or to the Broker:
Alexandra Rule
Phone Number: 615-493-9236
Email: Alexandra.murray@cbre.com

Submittal Deadline and Format:

The completed "Lease Proposal Quotation Form" must be submitted as follows:

No later than 3:00 PM CST on Tuesday, August 2, 2022:

Submittals must be received via:

Email: rfp.coordinator@tn.gov

(It is recommended that any email submission be sent "returned receipt requested" and confirm email is received)

Or

Printed copy to:

Department of General Services/STREAM

Attn: Stephen J. Lusk, Esq., Executive Director of Compliance

William R. Snodgrass Tennessee Tower, 24th floor

312 Rosa L. Parks Avenue
Nashville, TN 37243

Method of Evaluation:

Please refer to the State of Tennessee Real Estate Asset Management Division website for the complete document, which describes the proposal evaluation method, by using the following link: www.tnlpr.gov.

Disclaimer of Subjectivity:

Proposers should understand and accept that by responding to this solicitation they are willingly participating in a process that may consist of some degree of subjectivity. Proposers should be aware that the proposal determined to best meet the needs of the State may not necessarily be the lowest cost proposal.

Schedule 1

Space Needs Analysis Report
SNA Number: 34701-79-01
Agency: Revenue
County: SHELBY City: Bartlett
Employees: 41

Prepared By: FMG
Checked By:

SNA Date: 04-18-2022

Area Needed: 4,370
Major Circulation: 50% 2,185
Total Net Usable Needed: 6,555

SNA Note: Field Office. AWS, report created with information supplied and approved by Rachel. Refer to summary Sheet for additional information. 3

Space Type	Standard Description	Wall	Area	Count	Memo
P	00000 Collection Officer	None	0	5	Mobile. Space included in Free Address Area. Positions will use Free Address Area when in office.
P	00000 Collection Regional Officer	None	0	1	Mobile. Space included in Free Address Area. Position will use Free Address Office when working at this location.
P	00000 Collection Supervisor	None	0	1	Mobile. Space included in Free Address Area. Position will use Free Address Office when working at this location.
P	00000 Intern	None	0	3	Interns and visiting Administration. Mobile. Space included in Free Address Area. Position will use Free Address Area when in office.
P	00000 SI	None	0	2	Mobile. Space included in SI Hardwall suite Free Address Area. Positions will use Free Address Area when in office.
P	00000 SI Revenue Audit Technician	None	0	1	Mobile. Space included in SI Hardwall suite Free Address Area. Position will use Free Address Area when in office.
P	00000 SI Special Agent	None	0	3	Mobile. Space included in SI Hardwall suite Free Address Area. Positions will use Free Address Area when in office.
P	00000 SI Special Agent Supervisor	None	0	1	Mobile. Space included in Free Address Office used by SI. Position will use Free Address Office when working from this location.
P	00000 Tax Audit Associate	None	0	2	Mobile. Space included in Free Address Area. Positions will use Free Address Area when in office.
P	00000 Tax Audit Manager	None	0	1	Mobile. Space included in Free Address Area. Positions will use Free Address Area when in office.

Space Type	Standard Description	Wall	Area	Count	Memo
P	00000 Tax Audit Supervisor	None	0	2	Mobile. Space included in Free Address Area. Positions will use Free Address Office when working at this location.
P	00000 Tax Auditor	None	0	14	Mobile. Space included in Free Address Area. Positions will use Free Address Area when in office.
P	00000 TPS Account Clerk	None	0	1	Mobile. Space included in Free Address Area. Position will use Free Address Area when in office.
P	00000 TPS Customer Service Rep.	None	0	1	Mobile. Space included in Free Address Area. Position will use Free Address Area when in office.
P	00000 TPS Taxpayer Services Rep.	None	0	2	Mobile. Space included in Free Address Area. Positions will use Free Address Area when in office.
P	00000 TPS Taxpayer Services Supervisor	None	0	1	Mobile. Space included in Free Address Area. Position will use Free Address Office when working at this location.
S	BR Break Room	H	240	1	
S	CA Collaborative Area	0	85	1	
S	E Enclave	H	120	2	
S	E Enclave	H	120	1	Used by SI. With entrance to room through SI hard-wall suite
S	FM Fax Machine	0	12	1	
S	FA File Area	0	56	1	Space for 7 - Lateral File Cabinets located in hallways.
S	FR File Room	H	220	1	
S	FAA Free Address Area	0	49	6	
S	FAA Free Address Area	0	25	4	
S	FAA Free Address Area	0	30	6	
S	FAO Free Address Office	H	120	2	
S	FAO Free Address Office	H	120	1	Used by SI Supervisor. With entrance to room through SI hard-wall suite
S	FAR Free Address Reception	0	49	3	
S	FTIFS FTI File Storage	H	30	1	
S	LU Locker Unit	0	64	1	Space for 4 - Locker Units.
S	MA Mail Area	0	30	1	
S	MFCM Multi-Function Copy Machine	0	50	3	
S	PSA Personal Storage Area	0	96	1	Space for 12 - Lateral File Cabinets located in hallways.
S	RB Recycle Bin	0	6	2	
S	S Scannner	0	12	2	
S	SPSR Seized Property Storage Room	H	130	1	Used by SI.

Space Type	Standard Description		Wall	Area	Count	Memo
S	SPSR	Seized Property Storage Room	H	120	1	Used by Collections.
S	SNP	Shared Network Printer	0	12	4	
S	SB	Shredder Bin	0	6	2	
S	SIHS	SI Hardwall Suite	H	480	1	Includes space for 4 - Free Address Areas (196 sq.ft.), 5 - Lateral Files (40 sq.ft.), 1 - Locker Unit (16 sq.ft.), 1 - Multi-Function Copier (50 sq.ft.), 1- Scanner (12 sq.ft.), and 1 - Shred Bin (3sq.ft.) plus circulation.
S	SR	Supply Room	H	80	1	
S	TC	Telecom. Closet	H	80	1	For voice and data equipment.
S	TR	Training Room	H	720	1	
S	WR	Waiting Room	H	240	1	

Suggested Range:	Min.	Max.
Usable:	6,600	7,300
Rentable:	7,300	8,000

Revenue Shelby County Space Summary Sheet

Staff Counts – Total Staff: 41

Tax Audit Manager – 1 FA 40%
Tax Audit Supervisor – 2 FA40% (FA Office needed)
Tax Auditor – 14 FA40%
Tax Audit Associate – 2 FA40%
SI Special Agent – 3 FA25%
SI Revenue Audit Technician – 1 FA75%
SI – 2 FA25%
SI Special Agent Supervisor – 1 FA25% (FA Office needed)
TPS Account Clerk – 1 FA20%
TPS Taxpayer Service Rep – 2 FA20%
TPS Taxpayer Service Supervisor – 1 FA20% (FA Office needed)
TPS Customer Service Center Rep – 1 FA20%
Collection Supervisor – 1 FA40% (FA Office needed)
Collection Regional Officer – 1 FA20% (FA Office needed)
Collection Officer – 5 FA20%
Intern - 2 FA50%
Visiting Administration other offices – 1 FA10%

Zone One (Public Zone)

Hard Wall Spaces

1. Lobby to include:
 - Waiting area seating – seating for 12 people
 - Staff/Client Reception Window Bays – 3
2. Accessible Public Restrooms – quantity determined by plumbing code requirements (Client and Staff restrooms will be separate and will not share a plumbing wall)

(Secure access to Zone Two from here)



Zone Two (Intermediate/Staff Zone)

Hard Wall Spaces

1. OF-1 Free Address Office (120 sf) – 2
Tax Audit Supervisors, TPS Supervisor, Collection Supervisor, and Collection Regional Officer to share
2. EN-1 Enclave (120 sf) – 1
3. EN-2 Enclave (120sf) – 1
4. Training Room (720 sf) - seating for 24 people at mobile training tables with power/data– 1
5. Break Room (240 sf) (sized for 8 people) - 1
(refer to lease for exact requirements in break room)
6. Collections Seized Property Storage Room with shelving and LF cabinets (120 sf) – 1
7. Supplies Room with shelving (80 sf) – 1
8. Central File Storage Room with LF cabinets (220 sf) – 1
9. FTI File Storage Room with 1 Lateral File Cabinet (30sf) – 1
10. Telecom Room (80 sf) (room must be temperature controlled) – 1
11. Accessible Staff Restrooms

Open Office (systems furniture)

1. Free Address Workstations:
 - WS-1 at Reception Window (49sf) – 3
 - GC-1 Glass Cubicle Workstation – 2
 - WS-1 7x7 Workstation (49sf) – 4
 - WS-3 Quiet Pinwheel Workstation w/ 2 Ht. Adj. Desks (25sf) – 4 (one grouping of 4)
 - CA-2 Free Address Benching Workstation with glass toppers along spine and outer wing panels (30sf) – 6
2. CA-2 Enclave Table with 4 chairs (85sf) – 1
3. (4) Unassigned Locker Units (6 lockers per unit) (64 sf) – 1
4. Open Area Personal Staff Storage (96sf) – 1
 - Includes (12) 3-Drawer Lateral File Cabinets (1 drawer per person for 34 FA Staff)
 - CA-4-type setup preferred with common tops, 4 stools, and nearby power/data
5. Additional (7) 3-Drawer Lateral File Cabinets (56sf) – 1
6. Multi-Function Copier Area (50sf) – 3
7. Shared Network Printer (12sf) – 4
8. Scanner (12sf) – 2
9. Fax (12sf) – 1
10. Mail Area (30 sf) – 1
11. Shred Bin (6 sf) – 2
12. Recycle Bin (6sf) – 2

Zone Two Special Investigations (Secure Suite)

Hard Wall Spaces

1. Free Address Office (120 sf) – 1
SI Supervisor to use when in the office
2. EN-1 Enclave (120 sf) – 1
3. SI Seized Property Storage (130 sf) – 1
For (7) Shelving Units and 1 5dwr LF

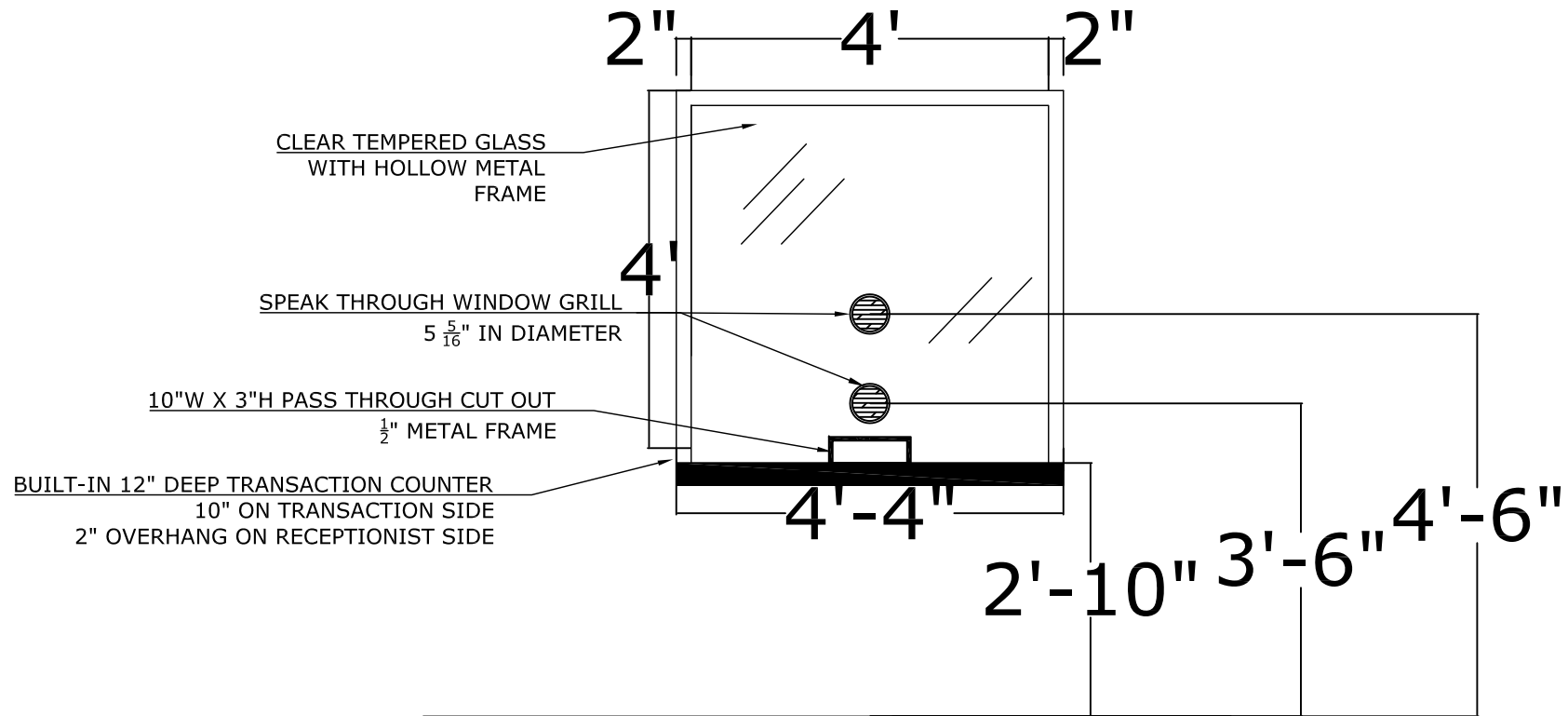
Open Office (systems furniture)

1. Free Address 7x7 Workstation (49sf) – 4
*Free Address Stations accommodate 60% of Free Address Staff
2. (1) Unassigned Locker Units (6 lockers per unit) (16 sf) – 1
3. (5) 3-Drawer Lateral File Cabinets in Open Area (40 sf) – 1
SI Free Address (FA) Staff Personal Storage
4. Multi-Function Copier Area (50sf) – 1
5. Scanner (12sf) – 1
6. Shred Bin (3 sf) – 1

The information on this space summary sheet is utilized to develop a Space Needs Analysis (SNA). The SNA formulates square foot ranges from the information on the space summary sheet(s). With your approval of the space summary, Leasing will proceed with the market assessment.

Approval Signature: _____ **Approval Date:** _____

Schedule 2



A

RECEPTION WINDOW TYP.

SCALE: 1/2" = 1'0"

DESIGNER :
EMAIL :
CELL :

REV 1 YRMODAY
ISSUED YRMODAY
Transaction#

RECEPTION WINDOW TYP.

AGENCY CONTACT INFO :
AGENCY SIGN OFF/ DATE:
ADDRESS :

NOT FOR CONSTRUCTION

**NOTE: This space plan, including furniture layout, has been developed based on programming information and input from the State of Tennessee and is considered to be the design intent. The Architect of Record will utilize this information to develop complete construction documents, in compliance with applicable codes and regulations.

STATE OF TENNESSEE
DEPT. OF GENERAL SERVICES
STREAM

WRS Tennessee Tower, 24th
312 Rosa L. Parks Ave
Nashville, Tennessee 37243



Schedule 3

DATE



BY ELECTRONIC MAIL

BROKER NAME
TITLE
COMPANY
COMPANY ADDRESS

Re: *Lease Commission Agreement*
ADDRESS ("Property")

CBRE, Inc. ("CBRE") looks forward to working with you on this proposed lease transaction. This letter confirms the terms of our agreement ("Agreement"), which shall be effective during the period commencing _____, and ending midnight _____ (the "Term").

1. We hereby identify the prospective tenant as **STATE OF TENNESSEE, DEPARTMENT OF GENERAL SERVICES**, or its affiliate, subsidiary, successor or assignee ("Tenant").
2. You acknowledge that we represent only Tenant (notwithstanding the fact that you are paying our commission) and agree that this is not a listing Agreement. All negotiations with Tenant shall be through CBRE.
3. You agree to pay us a leasing commission of **2.75** percent (**2.75%**) of the total Rental Rate specified in Section 7 of the Lease Agreement titled "Monthly Rental Installment" to be paid by Tenant over the initial term of the lease and to pay an additional commission in accordance with the provisions set forth below, if the Property, or any portion thereof, is ever leased to Tenant. Half of the commission amount is due and payable from you to CBRE upon lease execution, and the second half is due and payable from you to CBRE upon Lease Agreement and rent Commencement.

If the lease contemplated by this Agreement contains an express and described option(s) to add a specified period(s) of time to the initial term of the lease then you will pay a leasing commission of **1.375** percent (**1.375%**) of the Rental Rate per Section 7 of the Lease Agreement titled "Monthly Rental Installment" agreed to be paid by Tenant if the additional specified renewal option(s) are exercised by the parties to the Lease Agreement. The commission will be earned and payable at the time the additional option term(s) commence. No commission shall be paid upon any space in a subsequently leased addition to the original square footage or footprint of the initial Lease Agreement, nor shall any additional commission be paid on any lease holdover period the Tenant remains in the leased premises beyond the initial term or any renewal option period(s) of time specified in the Lease Agreement, nor shall any holdover language of any Lease Agreement be interpreted as an option for additional period of time specified in the Lease Agreement.

4. If you intend to sell, transfer or otherwise dispose of your interest in the Property while this Agreement is in effect, you agree to notify us in writing (including the name and address of the escrow or closing agent, if any) at least ten (10) days before that transaction closes. You agree to remain responsible for payment of commissions earned by us (or that may accrue in the future under this Agreement) unless the person or entity to whom you transfer the Property assumes your obligations in writing in a form reasonably acceptable to us. Earned but unpaid commissions will be automatically accelerated and paid at the closing of such transfer regardless of any other installment payment timetable previously agreed upon. This Agreement is an irrevocable instruction to the escrow or closing agent to pay commissions owed to us from deposited funds at closing, unless you or CBRE have entered into a satisfactory written agreement with the transferee to assume the obligation.

5. You agree to disclose to us and allow us to disclose to Tenant everything you know (after reasonable inquiry by you) regarding present and future property issues including, but not limited to, structural, mechanical, hazardous materials, zoning and environmental matters affecting the Property and/or the Property's condition.
6. You represent that you either are the fee owner of or otherwise have control over the Property. You further represent that you have full authority to enter into this Agreement without violating anyone else's rights, or any other agreements or contractual obligations.
7. To the extent legally permissible, we are authorized to deduct our commissions from any security deposits or rental payments made by Tenant in connection with a transaction contemplated by this Agreement. You hereby irrevocably assign those deposits and rental payments to CBRE to the extent necessary to pay us our commissions. In the event you fail to pay us our commissions within ten (10) days after they are due, we are authorized to provide a copy of this Agreement to the Tenant of the subject lease, and that Tenant is hereby irrevocably instructed by you to pay our commissions from any deposits or rental payments. You will credit such Tenant for any payments made to us pursuant to this paragraph against any payments due under their lease. Further, you waive any claim, action or right, whether at law or in equity, against the Tenant arising or resulting from their payments to us pursuant to this paragraph in lieu of any payments to be paid by the Tenant to you under their lease.
8. In the event that either party institutes legal action against the other to enforce its rights under this Agreement, the prevailing party shall recover its reasonable attorneys' fees and costs so incurred from the non-prevailing party. **EACH PARTY WAIVES THE RIGHT TO A TRIAL BY JURY IN ANY ACTION ARISING UNDER THIS AGREEMENT.**
9. You and CBRE agree to comply with all applicable laws, regulations, codes, ordinances and administrative orders. Further, we both acknowledge that: (a) it is illegal to refuse to display, lease or sell to or from any person because of one's membership in a protected class, *e.g.*: race, color, religion, national origin, sex, ancestry, age, marital status, physical or mental handicap, familial status, or any other class protected by applicable law and (b) the Property will be offered in compliance with all applicable anti-discrimination laws.
10. This Agreement is our entire agreement and supersedes all prior understandings between us regarding this engagement and is governed by the laws of the state where the Property is located, without regard to its conflict of laws principles. This Agreement will be binding and inure to the benefit of our lawful representatives, heirs, successors, designees and assignees. It may not be altered or terminated except in a writing signed by both you and CBRE. Neither party's failure to exercise any of its rights under this Agreement will relieve the other party of its obligations hereunder. Nothing herein is or may be deemed a waiver or full statement of any of our rights or remedies, whether at law or in equity, all of which are expressly reserved. If any provision of this Agreement is unenforceable or void under applicable law, the remaining provisions will continue to be binding. This Agreement and the rights, interests or obligations created hereunder will not be assigned by either of the parties without the prior written consent of the other party. We each agree that we have both participated in the negotiation and drafting of this Agreement. You acknowledge that the person signing this Agreement on your behalf has your full authority to execute it. This Agreement will be binding whether signatures are exchanged electronically or by hand, by mail, by fax, by electronic transfer or image, by photocopy or in counterparts.

We look forward to working with you on this transaction.

Very truly yours,

CBRE, Inc.
Licensed Real Estate Broker

By: _____
Frank Quinn

AGREED:
COMPANY NAME**

By: _____
Name: _____
Title: _____