

ROSE HILL PLANTATION

REQUEST FOR PROPOSAL FOR CONCESSION OPERATION OF THE

ROSE HILL EQUESTRIAN CENTER

1 EQUESTRIAN WAY, BLUFFTON, SC 29910

ISSUED: January 4, 2012

ROSE HILL PLANTATION POA

1 ROSE HILL WAY, BLUFFTON, SC 29910

WWW.ROSEHILLPOA.COM

I. NOTICE REQUESTING PROPOSAL

NOTICE IS HEREBY GIVEN THAT THE BOARD OF DIRECTORS OF THE ROSE HILL PLANTATION PROPERTY OWNERS ASSOCIATION, INC. (the "Association") will receive sealed proposals for the operation of Rose Hill Equestrian Center in Rose Hill Plantation in Bluffton, SC, at the Association's office located at 1 Rose Hill Way, Bluffton, SC 29910, on March 5, 2012 at or before the hour of 4:00 p.m.

The Board of Directors reserves the right to reject any and all proposals, to modify the terms of this Request for Proposal either before or after the deadline for submission of proposals, negotiate with one or more of the proposers, call for additional proposals, or refrain from accepting any proposal in its sole discretion. The Association expects to enter into a Concession Agreement ("Concession Agreement") with the successful proposer which shall in no event become effective until an award is approved by Resolution of the Board of Directors.

Proposals shall be submitted on the accompanying proposal form with attachments and shall conform to the requirements set forth in these instructions. Failure to complete any portion of the proposal form with attachments may be cause for rejection of the proposal.

The Association's policy in awarding this Concession Agreement will be based primarily on the most qualified proposer overall, and not simply on the rental payments proposed. The Association will carefully investigate each proposer's background and experience in the management and operation of like facilities.

Please ensure that your proposal is complete and delivered to the Association's office listed above on or before 4:00 p.m. on March 5, 2012. Under no circumstances will proposals be accepted after that time. Should you have any questions regarding this matter, please contact the Association's office at (843)757-2450 or email GM@rosehillpoa.com

Dated: January 4, 2012

Rose Hill Plantation Property Owners' Association
1 Rose Hill Way
Bluffton, SC 29910

II. REQUESTS FOR PROPOSALS

ROSE HILL EQUESTRIAN CENTER, ROSE HILL PLANTATION, BLUFFTON, SC

A. INTRODUCTION

The Rose Hill Plantation Property Owners Association is seeking an experienced operator to provide equestrian services at Rose Hill Equestrian Center. It is expected that a Concession Agreement will be awarded following advertisement for competitive proposals, evaluation of those proposals, selection of the best proposal and approval by the Board of Directors of the Association.

Parties interested in competing for the project must submit proposals in accordance with the instructions contained herein.

B. SETTING

Rose Hill Equestrian Center is an equestrian facility located inside Rose Hill Plantation, a master planned residential community in Beaufort County, South Carolina located on approximately 17.244 acres consisting of 35 horse stalls for renting to boarders and fenced paddocks.

Rose Hill Plantation offers an acclaimed Equestrian Center consisting of a stable, paddocks, riding ring, and approximately 7 miles of greenbelt riding trails. Residents of the community and boarders of the Equestrian Facility have access to the trails throughout parts of the north side of the community. This Equestrian Facility provides Rose Hill residents with an amenity that is unique within the County of Beaufort.

On occasion, Rose Hill welcomes the general public to participate in various Equestrian Events including the Okatie Rotary Polo for Charity and the Hilton Head/Savannah Equestrian Exposition.

C. LOCATION

The Equestrian Center is located at 1 Equestrian Way, Bluffton, SC 29910 on the north side of the Rose Hill community approximately 3/4 of a mile from the entrance on U.S. Highway 278.

D. RECREATIONAL OBJECTIVES

The Rose Hill Equestrian Center is intended to provide a horse boarding facility open to the residents and general public; available for the boarding of individually owned horses, and to provide lessons for riders and training for horses for both boarders and members of the general public.

The Proposal will be evaluated based on a proposer's ability to offer a variety of programs and services. The proposal should demonstrate the proposer's capability to improve, maintain and manage the Rose Hill Equestrian Center in addition to providing a range of equestrian-oriented programs and services. These programs and services may be provided directly by one proposer or in combination with an agreement with qualified sub-contractors.

This RFP will review the primary proposer's experience related to the following list of requirements:

1. Provide a full service equestrian facility including, but not limited to, horse boarding, group and individual instruction for adults and youth and other programs consistent with or complimentary to an equestrian center (for example, horse shows and clinics, educational, instructional and other services consistent with an equestrian center; children summer day camps etc.). Trainers must meet the necessary insurance requirements.
2. Partner with the Association to maintain the equestrian trails regularly and consistently to the standards set by the Rose Hill Board of Directors. Equestrian trails are restricted to equestrian activity only and may be used by boarders, lesson student, residents and their guests. ASTM helmets shall be required for all trail activities.
3. Offer hours of operation consistent with a similarly situated equestrian center.
4. Improve the facility to maximize accessibility, general safety and overall appearance.
5. Assume all maintenance, upkeep and operational obligations for the Equestrian Center at no cost to the Association.
6. Protect creek water quality and riparian habitat; provide a manure removal program that allows no more than 80 cubic yards of manure on the property at any time.
7. Provide a presence (by proposer, an employee or person acting on behalf of proposer) on the site to operate the facility and respond to emergencies on a 24 hour per day, 365 days per year basis.
8. Provide all state and county permits for operation including, but not limited to, DHEC permits and required business licenses.
9. Provide a written evacuation plan for emergency and disaster preparedness for facility, boarders and horses.
10. Ability to provide for comprehensive liability insurance including personal injury and property damage with contractual liability endorsement naming the Association as additional insured against any and all liability; and property

damage insurance in an amount not less than the full replacement cost plus flood, fire and extended coverage on buildings, facilities, all furniture, equipment, supplies and other property to the full replacement cost.

E. CAPACITY

The current capacity for boarded horses is a maximum of 35.

F. TERM OF AGREEMENT

The Association is seeking to enter into a Concession Agreement with the successful proposer for a minimum five (5) year initial term with renewal options at the Association's sole discretion, as shall be more particularly described in the Concession Agreement.

III. INSTRUCTIONS

A. PURPOSE

This Request for Proposal (RFP) provides all potential operators with relevant information, a proposed sample Concessionaire Agreement, and the necessary forms required to submit a proposal for operation of Rose Hill Equestrian Center.

B. PROCEDURES

Proposals must be submitted according to these instructions. Sealed proposals will be received at the Association's office, 1 Rose Hill Way, Bluffton, SC 29910, until 4:00 p.m. on the due date March 5, 2012.

1. Instructions for Submitting Proposals.

All proposals must be submitted in triplicate (one original and two copies). This information should be submitted in a sealed envelope bearing on the outside the name of the proposer, his/her address, and the words "RFP Rose Hill Equestrian Center." If forwarded by mail, the sealed proposals must be enclosed in a larger mailing envelope and received by the Association at 1 Rose Hill Way, Bluffton, South Carolina 29910, by 4:00 p.m. on the due date March 5, 2012.

2. Interpretation of Documents and Addenda.

The proposer must carefully examine the requirements and conditions expressed in the attached documents and become fully informed as to the quality and character of facilities and actions required. If any person planning to submit a proposal finds any discrepancy or omission from the proposal documents, or has any question concerning this Request for Proposal, a written request for interpretation must be submitted to the Association's General Manager at the address shown above. The Association is not responsible for any explanation or interpretation obtained in any other manner. Any change or modification to this RFP shall be issued in the form of Addenda to the Request for Proposal. Addenda prepared for this Request for Proposal will be mailed to all parties listed as requesting a copy of the Request for Proposal at least ten (10) days prior to the proposal opening date. This practice shall be observed even if the proposal opening date must be postponed.

3. Site Visit.

A site visit is available by appointment only.

4. Withdrawal of Proposals.

Proposals may be withdrawn only in person by the proposer or an identifiable representative of the proposer.

5. Rejection of Irregular Proposals.

Proposals not meeting the stated minimum terms and qualifications may be rejected by the Association. The Association reserves the right to waive any irregularities, technicalities, or informalities in any proposal, and to reject any or all proposals at its sole discretion.

6. Review of Proposals.

All proposals shall be reviewed by a committee consisting of representatives of the Association staff and other interested parties selected by the Association.

C. REQUIRED FORMS

All forms shall be submitted in triplicate (one original and two copies) on Association forms where provided, and in accordance with these instructions. Provided forms should not be modified. Extra sheets may be used to provide additional information.

1. Forms Provided:

- a. Proposal Form. Proposer shall insert the rate of rent offered to the Association under the Concession Agreement.
- b. Statement of Personal History and Experience. Each proposer shall provide a statement of personal history and experience covering his/her or its background, knowledge and experience in the operation of an equestrian facility or facilities, and in the management of the facility or facilities.
- c. Statement Regarding Services. A plan for proposed enhancements of facilities and improvement of services should be outlined. The authority to allow any of the proposed enhancements and services rests with the Association. Provide a brief description of any proposed additional services.
- d. Authorization Form. Proposer shall provide financial information requested in the attached form, including signing the information release form for the bank. A signature is also required to permit the Association authority to perform a personal background check.

2. Forms Not Provided:

- a. Business Plan. Proposer shall prepare a projection of revenues and expenditures anticipated from the proposed concession activities. The statement must show month-by-month projections for the first twelve months, assuming a commencement date of June 1, 2012.

b. Insurance.

Proposer shall include a letter from an insurance company or its broker or agent licensed to do business in South Carolina and rated "A" or better by Bests Key Rating Guide stating that the insurer has reviewed the attached proposed sample Concession Agreement and shall provide the required insurance (including insurance for Special Events).

c. Proposed Sample Concession Agreement Language Changes.

Proposer shall provide the specific language of any proposed changes to the attached proposed sample Concession Agreement, and provide a full written explanation of why each change is proposed. The Association, in its sole discretion, shall approve or reject each proposed change and have the right to make other modifications in the proposed sample Concession Agreement prior to final execution as agreed by the parties.

d. Written Information. All marketing/advertising must be approved by the Association.

e. Boarder Agreement. Proposer shall attach a sample of his/her or its boarder agreement used in prior operations or proposed to be used at this facility.

f. Release, Waiver and Assumption of Risk Agreement. Proposer shall attach a sample of his/her waiver form to be used for the public rental horse ride operation.

IV. BASIS OF AWARD

In seeking a Concessionaire for the Rose Hill Equestrian Center, the Association desires to provide quality service to the community and members of the general public in an atmosphere compatible with the natural, beautiful setting of Rose Hill Plantation.

The Association shall investigate and review the financial capability, reputation, integrity, skill, relevant experience, and quality of performance of each proposer, including its stockholders and principals, if any, before making award. Award of a Concession Agreement, if any, will be based on both objective and subjective comparison of proposers and proposals. Information being solicited from proposers is intended to provide the Association with adequate knowledge of proposers and proposals in order that the Association can judge the relative merits of each. Evaluation will be based on the items listed below. Except for payments to the Association which shall bear heavier weight, the order of the items below is not intended to portray any ranking of the relative priority.

A. ITEM CONSIDERATION

1. Payments to Association: Evaluation of projected payments; evidence of ability to make such projections.
2. Quality of Service: Evaluation of previous and proposed quality and quantity of service; ability to work harmoniously and flexibility with others.
3. Experience and Background: Years in business; amount of relevant experience (breadth and length); evidence of a variety of experiences in the business.
4. Financial Capability: Capability to provide services throughout the term with adequate strength to cover start-up and sustain possible losses; sources of financing and availability of immediate funds and back-up funds; proposed investment in promotion. Provide first and last month's rent.
5. Enhancement: Proposed enhancement plan for improvement of facilities and services at Rose Hill Equestrian Center; on-going and consistent maintenance of the equestrian trails; and evidence of ability to accomplish these objectives.
6. Concession Agreement Changes: Effect on Association and reasonableness or proposed changes.

PROPOSAL FORM

ROSE HILL EQUESTRIAN CENTER

To the BOARD OF DIRECTORS OF ROSE HILL PLANTATION PROPERTY OWNERS ASSOCIATION, INC.:

The undersigned have visited the site, made inspections and investigated the conditions surrounding the concession at the Rose Hill Equestrian Center located at 1 Equestrian Way, Bluffton, SC 29910 part of Rose Hill Plantation in Beaufort County to our satisfaction. We have read and understood the Request for Proposals, including the attached Proposed Sample Concession Agreement in accordance with this proposal and propose to enter into the Agreement. We have had and used the opportunity to obtain relevant information from the Association, but agree that all such information must be checked by us since we can rely only on the written material in the RFP. We also agree that any clerical, mathematics, or other errors made by us in preparing this Proposal shall not relieve us of our obligation to enter into the Concession Agreement as proposed.

If our Proposal is accepted by Association, the undersigned, as Concessionaire agrees to:

Pay a Monthly Flat Rate Concession Fee

Affidavit of Proposer. Each of the undersigned hereby represents, warrants and certifies to the Rose Hill Plantation Property Owners Association that:

(1) The proposal is genuine and not a sham or collusive or made in the interest or on behalf of any person not named, and neither the proposer nor the undersigned have directly or indirectly induced or solicited any other person, firm, or corporation to refrain from submitting a proposal or to submit a sham proposal, and that the proposer has not in any manner sought by collusion to secure for himself an advantage over any other proposer.

(2) There are no material misstatements or withholding of facts in this proposal or in any of the attachments supplied with the proposal. The proposer acknowledges that any such misstatement or withholding shall constitute good cause for cancellation at any time by Association of the Concession Agreement. The undersigned hereby submits this proposal as of this ____ day of _____, 2012._

Sole Proprietorship

Mailing Address: *

Signature

_____**

Partnership or Joint Venture

Mailing Address: *

Name of Partnership or Joint Venture,
a South Carolina _____
(type of entity)

Signatures

_____**

_____**

_____**

_____**

Corporation

Mailing Address: *

Name of Corporation,
a South Carolina Corporation (Seal)

Signatures

_____*

President
No. of shares owned: _____

_____*

Secretary
No. of shares owned: _____

* Show residence Address if different from mailing address.

** Type or print name and title beneath each signature.

STATEMENT OF PERSONAL HISTORY AND EXPERIENCE

This statement forms a part of the proposal for the concessionaire at Rose Hill Equestrian Center. (If a question does not apply to you, place NA on the space provided.)
(Use additional sheets if necessary to fully answer the following questions)

Date: _____

1. Name: _____

2. Residence or Business Address: _____

3. Residence or Business Phone: _____

4. Social Security Number or Taxpayer Identification Number: _____

Social Security Number or Taxpayer Identification Number will be used to assist the Association in verifying financial information submitted by proposers. If financial information can not be verified, the Association will not be able to evaluate the applicant.

5. South Carolina License No: _____ Expiration Date: _____

6. Previous Residence for the past five years, and dates:

A. _____ Dates: _____

B. _____ Dates: _____

C. _____ Dates: _____

7. What is your present business or employment? _____

If self employed:

Are you its full _____; or partial (_____ %) owner?

Address: _____

Phone: _____ For how long: _____

10. Is your business a sole proprietorship, corporation, partnership or other? Explain:

If sole proprietorship, are you the owner? Yes _____ No _____

11. Describe services you perform:

12. Have you ever had a bond or surety canceled or forfeited? Yes _____ No _____

If yes, state the name and address of the bonding company, date, amount of bond and reason for such cancellation or forfeiture:

13. Have you ever been convicted of or pled guilty to any crime (other than minor traffic violations)? Yes _____ No _____

If yes, state violations, dates, and locations:

14. Have you or your spouse ever been adjudicated bankrupt or filed any form of bankruptcy proceedings? Yes _____ No _____

If yes, state date, court jurisdiction, amount of liabilities and amount of assets:

15. Has any corporation in which you were an officer filed bankruptcy during the time you were an officer? Yes _____ No _____

If yes, state the name of such corporation, your position, date, court jurisdiction, amount of liabilities and amount of assets:

16. Have you ever owned, managed or been employed by an equestrian operation or related enterprise? Yes _____ No _____

(Detailed description of all instances is required to be listed below or attach)

a. Name of Business: _____

Type of Business: _____

Location: _____

Job Title: _____

Length of Employment: From _____ To _____

Reason for Leaving: _____

b. Name of Employer: _____

Type of Business or Facility: _____

Location: _____

Job Title: _____

Length of Employment: From _____ To _____

Description of work and responsibilities: _____

Reason for Leaving: _____

17. Have you ever been involved in the promotion or production of any special events for large groups? Yes _____ No _____

If yes, provide names, dates, number of people attended, and describe your activities and responsibilities:

18. What security measures do you plan to use? _____

19. What are the proposed barn rules and where will they be posted?

20. List any additional evidence of your qualifications to provide equestrian services, promote facility enhancement, and produce special events for the Rose Hill Equestrian Center:

21. List your method of compliance with the South Carolina Injury and Illness Prevention Program _____

22. List your methods of compliance with the American Disability Act (ADA):

I certify under penalty of perjury that the foregoing is true and correct. Material falsification is grounds for termination of Concession Agreement by the Association.

Signature: _____

Title: _____

(This form may be reproduced as needed.)

STATEMENT OF PROPOSER'S PRINCIPALS

List the person(s) who will have primary management responsibility for each of the indicated components of the proposal:

A. Preparation of the proposal.

Name: _____

Title: _____

Address: _____

Daytime Telephone: _____

I agree to be available (subject to disability) to the proposer to perform such services from _____, 2012, until at least _____.

Signature: _____

I certify that the foregoing is true and correct. Material falsification is grounds for rejection of the proposal and/or termination of the Concession Agreement.

Signature: _____

STATEMENT REGARDING ADDITIONAL SERVICES

A. FACILITY ENHANCEMENT

The Association is particularly interested in encouraging enhancement of the Rose Hill Equestrian Center. Proposer should indicate here ideas and activities he/she or it proposes to achieve this goal.

B. SPECIAL EVENTS

The Association is also interested in the possibility of additional special events to be held at the Rose Hill Equestrian Center. These events should provide an enjoyable visit to Rose Hill Plantation while increasing and promoting use of the Rose Hill Equestrian Center. Proposer should indicate ideas she/he or it is willing to pursue in order to produce such special events, such as Horse Shows, Clinics, Special Needs Training, etc.

C. ROUTINE MAINTENANCE

Describe the proposed routine maintenance procedures at this facility.

D. REFERENCES

Provide at least three equestrian references (Name and Phone Number).

1. _____
2. _____
3. _____
4. _____
5. _____

STATEMENT OF FINANCIAL CONDITION

This statement forms a part of the proposal for the Rose Hill Equestrian Center Concession Operation. If a question does not apply to you, write N/A in the space provided. As part of the final selections procedure, it will be necessary for the Association to verify each proposer's financial condition and credit rating. So that we may do this, please provide the information requested below. Material inaccuracies may result in your proposal, or even an awarded Concession Agreement, being invalidated. Submit a separate statement (copy this form) for the proposer and each other person for whom a separate statement must be submitted pursuant to RFP.

Name: _____

Address: _____

Telephone: _____

SUPPLIERS

Please list the suppliers of hay, grain, manure management, etc. with whom you do business.

- 1. _____
- 2. _____
- 3. _____
- 4. _____
- 5. _____

OTHER REFERENCES

Please list three credit references:

<u>Name/Address</u>	<u>Daytime Telephone</u>
1. _____	_____
2. _____	_____
3. _____	_____

A Business Financial Statement, prepared by a CPA or Public Accountant, or three years of Federal income tax returns will be required from final applicants.

I certify that the foregoing is true and correct. Material falsification is grounds for rejection on the Proposal and/or termination of the Concession Agreement.

Signature: _____

Date: _____

Notary:

My commission expires _____, 20____

LIST OF ENCLOSURES AND ATTACHMENTS FOR ROSE HILL EQUESTRIAN
CENTER CONCESSION

ITEM	CHECK IF ENCLOSED	FOR ASSOCIATION USE ONLY-Reviewed and found properly submitted (Initial and date)
Proposal form	_____	_____
Statement of Proposer's Principals	_____	_____
Statement Regarding Additional Services	_____	_____
Statement of Financial Condition	_____	_____
Business Plan	_____	_____
Insurance	_____	_____
Concession Agreement Language Changes	_____	_____
Written Information	_____	_____
Sample Boarder Agreement	_____	_____
Sample Waiver Form	_____	_____
Statement of Personal History and Experience	_____	_____