



Attention Firms

If you are downloading the RFQ from the website, continue to monitor the website for addenda. Failure to incorporate any addenda into your submittal may cause your submittal to be considered non-responsive.

Thank you.

OREGON STATE UNIVERSITY

REQUEST FOR QUALIFICATIONS #193295

Strategic Framework Plan

ISSUE DATE: March 15, 2018

RFQ CLOSING (DUE) DATE: Tuesday, April 12, 2018, 2:00 pm Local Time

NO LATE RESPONSES WILL BE ACCEPTED

CONTRACT ADMINISTRATOR:

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RFQ Response due Tuesday, April 12, 2018, 2:00 pm Local Time

Email: hanna.emerson@oregonstate.edu

1.0 Introduction:

Oregon State University (OSU) is seeking statements of qualifications from integrated teams for the creation of a Strategic Framework Plan (SFP). The SFP will be used to document and guide the physical development of the university over the next decade in support of its academic, research and outreach missions; quality of student life (student experience); and place in the community. The consultant team will provide expertise in campus and urban design, landscape design, infrastructure planning, environmental and sustainability planning, and outreach and meeting facilitation.

Oregon State University was established in 1868 and has land grant, sea grant, space grant, and sun grant designations. It includes eleven (11) colleges and has a student population of 30,000 on the Corvallis campus. A public research university, it achieved \$441 million in external research funding in 2017. Part of the Pacific Athletic Conference (PAC-12), OSU is a National Collegiate Athletic Association (NCAA) Division I school.

The Corvallis campus is located in the Willamette Valley, approximately eighty miles south of Portland. The main campus, excluding associated agricultural and forest lands, is approximately 570 acres and lies within the city of Corvallis. A portion of the campus has been identified as a National Historic District.

2.0 Project Description:

The purpose of the Strategic Framework Plan for the OSU Corvallis Campus is to identify the university's values and vision for how the campus will evolve over the next ten (10) years. It will provide the necessary specificity to inform and guide decisions regarding the best ways to accommodate growth, new development, and redevelopment in support of the university's strategic mission, plan, and actions. It will provide guidance for development of code standards, but it is not intended to be a regulatory document and will provide enough flexibility to respond to unanticipated future conditions.

A partner document to the university's strategic plan, the strategic framework planning effort will consist of five (5) components:

- Current state of the built environment and related open spaces
- Growth projections and the 10-year capital forecast
- Vision, guiding principles, core values, and goals for how the campus should look, feel, and function in ten years
 - Campus stakeholders and community members (internal and external to OSU) will be included in the visioning process to determine our collective campus and community values.
- Planning concepts and design guidance
 - The plan will address buildings and structures, utility infrastructure, the transportation network, parking facilities, open space network, recreational and athletics facilities. The concepts may include guidance

regarding building location and siting; building height, massing, and setbacks; edge conditions and treatments; important linkages, connections, and corridors; and circulation networks.

- Implementation recommendations and priorities. The opportunity also exists to create guidelines for development that will inform updates to internal planning documents, construction standards, and could be used to inform external planning efforts.

Growth projections, the 10-year capital forecast, and OSU Transportation Plan have been prepared separately and will be incorporated into the SFP.

Engagement of diverse communities within OSU and outside - such as adjacent land owners; neighborhood associations; county, city and state officials and staff - is vital to the success of the project. Experience with digital surveys, focus groups, and public open houses is very important.

The work is to be accomplished in no more than eighteen (18) months.

An advisory committee comprised of Vice Presidents, Vice Provosts and Deans, the University Architect, Design and Construction Manager/Sr. Project Manager and the University Land Use Planning Manager will work with the consulting team and make recommendations to the Vice President for Finance and Administration, Provost, and President. Additionally, working groups will be formed in support of the effort to include members of units within Athletics; Equal Opportunity and Access; Infrastructure Working Group co-chair; Student Affairs; University Facilities Infrastructure and Operations (Capital Planning, Design and Construction, Facilities Services, Leasing and Real Property Management, Sustainability Program, Transportation and Parking Services, University Architect and Capital Resource Management, and University Land Use Planning); University Housing and Dining Services; and University Relations and Marketing. Finally, internal advisors including Accessible University Advisory Committee, Campus Planning Committee, Faculty Senate Executive committee, Infrastructure Working Group, Safety Committee, and Transportation committee will be engaged and consulted.

3.0 Project Goals:

The proposed outcome of the SFP is a broadly focused, comprehensive, framework that establishes a vision and guiding principles for the future development of campus including site selection criteria, design direction, effective integration of pedestrian and vehicular movement, infrastructure support, and the enhancement and conservation of open spaces. In balancing these various concerns, the university will continue to be a public amenity for all in the state of Oregon.

4.0 Selection Process:

This Request for Qualifications selection process will be conducted pursuant to the terms of this RFQ and OSU Standard 580-063-0020, relating to the selection and retention of professional consultants. Once the qualification responses have been

reviewed and scored, the top three (3) to five (5) firms will be invited participate in on-site interviews.

5.0 Compensation:

Compensation will be based on a total “not-to-exceed” amount for services and reimbursable expenses. The amount of compensation will be negotiated with the respondent who has submitted the best qualifications (the Apparent Successful Respondent). **No cost proposal or price information is to be submitted with qualification responses.**

6.0 Evaluation Criteria:

Indicate in writing the following information about your firm’s ability and desire to perform this work. Qualification responses will be rated based upon the weight assigned to each item as noted in the parenthesis at the end of each statement below.

- A. Provide a brief description of your firm(s) and the focus of the practice(s). Have the firms worked together before? If so, in what capacity. If not, what led the firms to partner for this project? (Weight: 10)
- B. Describe your team’s experience with strategic planning, master planning, and design of higher education learning environments. (Weight: 25)
- C. Identify project related experience of key personnel who will be working on this project. Indicate their current availability and proposed percentage of project involvement. Also, describe the experience of the overall project manager as it pertains to working with a multidisciplinary team, multiple committees, and public outreach workshops, meetings, and presentations. (Weight: 25)
- D. Describe your team’s demonstrated ability to translate strategic thinking and vision statements into physical plans and design guidelines. Describe the team’s approach to finding consensus amongst diverse (and at times divergent) stakeholders. Provide specific examples from the last five years. (Weight: 35)
- E. Provide a description and identification of Minority Business Enterprise (MBE), Women Business Enterprise (WBE), Emerging Small Business (ESB), Disabled Service Veterans (DSV) certifications for your firm and a description of your nondiscrimination practices. Provide historical information on MBE, WBE, ESB or DSV joint ventures, subcontracting or mentoring plan, and utilization history for projects completion by your firm within the past three (3) years.

Provide a narrative description of your current workforce diversity program/plan, and the plan for obtaining subcontracting, consulting and supplier diversity for this Project. Include a description of the outreach program or plan, including a schedule of events and specific steps that will be taken to maximize broad based and inclusive participation and the plan to provide mentoring, technical or other business development services to subcontractors needing or

requesting such services.

The selected firm will provide the services with respect to diversity according to the means and methods described in the workforce plan described in the response, unless changes are requested and approved in writing in advance by OSU or are required by applicable laws, ordinances, codes, regulations, rules or standards. (Weight: 10)

7.0 References:

In addition to responding to the evaluation criteria above, provide the names, addresses and phone numbers of three owners to be used as references for this project. Verify that the individuals identified have had direct contact with the referenced project, and the phone number is current. Do not include references from any firms or individuals included in your team for this Project or any OSU personnel. OSU may check with these references and with other references associated with past work of your firm.

8.0 Selection Procedure and Timetable:

The selection procedure described below will be used to evaluate the capabilities of interested firms to provide the professional services to OSU for this project.

March 15, 2018	Issue RFQ
April 12, 2018	RFQ response due 2:00 pm, Local Time
April 20, 2018	Notification of finalists
May 7, 2018	Interviews with Selection Committee
May 21, 2018	Estimated Notice of Intent to Award
June 11, 2018	Estimated Contract Execution

Site Visit: No mandatory site visits are required as part of the selection process.

9.0 Evaluation Process:

This RFQ is the first step in a two-step process in the selection of the integrated team for the creation of the SFP. The responses to this RFQ will be evaluated by the selection committee, which will be comprised of university personnel who score qualification statements and rank finalists and another group of university personnel who serve as advisors but do not score qualifications or rank finalists. On the basis of this evaluation, the selection committee will make its best efforts to limit the field of finalists to at least three (3), but not more than five (5), finalists to be selected for final consideration through interviews of each finalist and further investigation of references. OSU will utilize this RFQ process to obtain information to enable selection of the most qualified respondent through evaluation of:

- a. The respondents' responses to evaluation criteria in section 8 of this document;
- b. Information obtained during an interview of the respondents by the selection committee; and

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- c. The results of discussions with the respondents' references and others.

Each criterion in the first step of the evaluation process has been assigned a weight between ten (10) and thirty-five (35). Each member of the evaluation committee will rate each firm in each criterion between one (1) and five (5) (five being the highest), and multiply that number by the weight assigned to the criterion. The evaluation committee members will then total the weighted score from all of the criteria to obtain the total score. The result of this total score will be used to rank all respondents. The top ranked three (3) to five (5) firms will be invited to participate in on-site interviews.

The evaluation committee will meet and compare the individual evaluation committee member rankings. The committee will discuss firm strengths and weaknesses and the individual evaluation committee member scorings. The evaluation committee discussion will result in the consolidated ranking from which the finalists for interviews will be selected for step two of the process.

The RFQ responses will be used in preparation for interviews of the finalists.

After all of the interviews are completed, the evaluation committee will discuss the strengths and weaknesses of the interviewed finalists. The committee will then rank the interviewed finalists in order of preference based on all information received, presented and heard during the interviews. The finalist that has the highest overall ranking will be deemed the Apparent Successful Respondent. Final ranking will be based on finalist's response to questions during the interview stage, and through that response, how well each finalist can meet the Project and University needs.

Interviews will include a sixty (60)-minute presentation period, immediately followed by a separate thirty (30)-minute Q&A session. Finalists should be prepared to address the following:

- In general, what is your understanding and recommendation of how to best utilize the deliverables?
- Why is your firm interested in this project? Additionally, why were each of the team members invited to participate in this work and what do they contribute?
- What specific challenges might you anticipate for this project based on past project experiences and "lessons learned" from previous similar projects? Based on these experiences, how will the team keep the project directed and moving forward?
- Based on what you know about OSU, what are the first few questions you want answered and who are the first few people and or departments you want to visit?
- This project will require stakeholder and public engagement to scrutinize elements of the plan such as the vision, guiding principles, values and the way goals are developed for how the campus should look, feel and function during the next decade. What would be your plan to engage internal and external stakeholders in the development and review processes, while keeping the project on time and in budget?

If, during the discussion, the selection committee determines the interviewed finalists are too close to rank, the university has no recent experience working with a finalist, or if the consolidated ranking indicates a tie, the committee will check the references provided by the respondent as required by this RFQ. Information obtained from references may alter the committee's final ranking of finalists. Any alteration of final ranking will be based on committee's understanding of how well each firm can meet the needs of the Project and University.

OSU will then negotiate with the Apparent Successful Respondent the price and specific statement of work of a contract, consistent with OSU's Standard Consulting Agreement attached to this RFQ. If OSU and the Apparent Successful Respondent are unable to reach agreement, OSU will negotiate with the second-ranked respondent, etc. The sample agreement may contain certain notes or alternative provisions. Those alternative provisions will be included at the sole discretion of OSU.

10.0 Responsibility Evaluation:

OSU reserves the right to investigate each respondent's responsibility in accordance with the requirements of Division 61 of OSU Standard Chapter 580, and will consider information obtained from any source as part of its evaluation, at any time prior to execution of a contract. Submission of a signed qualification response constitutes the respondent's approval for OSU to obtain any information OSU deems necessary to conduct the evaluation including, but not limited to, credit reports and information discovered during reference checks.

Financial Information: OSU will notify respondents, in writing, of any financial documentation required, which may include recent profit-and-loss history; current balance statements; assets-to-liabilities ratio, including number and amount of secured versus unsecured creditor claims; availability of short and long-term financing; bonding capacity and credit information.

OSU may postpone the award or execution of a contract in order to complete its investigation and evaluation. Failure to promptly provide complete information requested will render the qualification response nonresponsive. Failure of a respondent to demonstrate responsibility will render it non-responsible and constitute grounds for qualification response rejection.

11.0 Submission:

Submit **nine (9)** hard copy versions of your written qualification response, along **with one (1) electronic version on a thumb drive** to be received by the closing date and time listed in this document to:

Attention: Brooke Davison
Construction Contract Administration
Oregon State University
644 SW 13th Ave.
Corvallis, OR 97333

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Your qualification response must be contained in a document **not to exceed twenty-five (25) single sided pages**, including pictures, charts, graphs, tables and text the respondent deems appropriate to be part of the review of the respondent's response. Resumes of key individuals proposed to be involved in this project are exempted from the twenty-five (25)-page limit and should be **appended to the end of your response**. No supplemental information to the twenty-five (25) page qualification response will be allowed. Appended resumes of the proposed key individuals, along with a transmittal letter, table of contents, front and back covers, and blank section/numerical dividers, etc., will not be counted in the twenty-five (25) page limit.

Information should **be presented in the same order as the above evaluation criteria**. **The electronic qualification response should be sized appropriately for transfer (under 8 MB)**. The written response should be submitted in a **soft-bound** (comb or spiral, spiral preferred – no three-ring binders) format with page size of **8 ½ x 11 inches** with no fold-outs. The basic text information of the response should be presented in standard business font size, and reasonable margins.

Your qualification response must be signed by an officer of your firm with the authority to commit the firm and contain contact information including email for communication purposes.

OSU may reject any qualification response not in compliance with all prescribed public bidding procedures and requirements, and may cancel this solicitation or reject for good cause all qualification responses upon a finding by OSU that it is in the public interest to do so.

Note that OSU will not accept qualification responses or queries that require OSU to pay the cost of production or delivery.

OSU is an AA/EEO employer.

Telephone, facsimile, or electronically transmitted submittals will not be accepted.

Qualification responses received after the closing date and time will not be considered.

12.0 Questions:

All questions and contacts with the OSU regarding any information in this RFQ must be addressed in writing, fax or email to Brooke Davison at the address, email or fax listed in this document no later than April 3, 2018, at 5:00 pm Local Time. **Do not contact** any OSU personnel including, but not limited to the Project Manager, OSU Executive Leadership, college deans, the advisory committee, and/or any potential working group members addressed in this RFQ. Ms. Davison is the only point of contact for this RFQ.

13.0 Solicitation Protests:

You may submit a written request for clarification or change or protest of particular solicitation provisions and specifications and contract terms and conditions (including comments on any specifications or terms that you believe limits competition) to Hanna Emerson, Construction Contracts Manager at the address, email or fax listed in this document. Requests and protests must be received no later than March 20, 2018, at 5:00 pm, Local Time. Requests or protests must state the reasons for the request or protest and any proposed changes to the solicitation provisions and specifications and contract terms and conditions.

14.0 Change or Modification:

Any change or modification to the specifications or the procurement process will be in the form of an addendum to the RFQ and will be made available in the form of an addendum posted to the OSU Business and Bid Opportunities (<http://bid.oregonstate.edu/>) website. No information published in any other manner will serve to change the RFQ in any way, regardless of the source of the information. Any request for clarification or change or protest of anything contained in an addendum not received by the date and time stated in the addendum will not be considered.

15.0 Selection Protests:

Any respondent to this RFQ who claims to have been adversely affected or aggrieved by the selection of a competing respondent may submit a written protest of the selection to Hanna Emerson, Construction Contracts Manager at the address given in the RFQ within three days after notification of that selection. Any such protests must be received by Ms. Emerson no later than three days after the notification of selection has been made in order to be considered. The selection decision notification will be made by OSU via posting to the OSU Bid and Business Opportunities website (bid.oregonstate.edu).

16.0 Proprietary Information:

OSU will retain this RFQ, one copy of each qualification response received and an electronic copy of each qualification response received, together with copies of all documents pertaining to the award of a contract. These documents will be made a part of a file or record, which will be open to public inspection after OSU has announced an Apparent Successful Respondent or all qualification responses have been rejected. If a qualification response contains any information that you consider to be a trade secret under ORS 192.501(2), you must mark each trade secret with the following legend: **"This data constitutes a trade secret under ORS 192.501(2), and must not be disclosed except in accordance with the Oregon Public Records Law, ORS Chapter 192."**

The Oregon Public Records Law exempts from disclosure only bona fide trade secrets, and the exemption from disclosure applies only "unless the public interest requires disclosure in the particular instance."

Therefore, non-disclosure of documents or any portion of a document submitted as part of a qualification response may depend upon official or judicial determination made pursuant to the Public Records Law.

In order to facilitate public inspection of the non-confidential portion of the qualification response, material designated as confidential must accompany the qualification response, but must be readily separable from it. Prices, makes, model or catalog numbers of items offered, scheduled delivery dates, and terms of payment will be publicly available regardless of any designation to the contrary. Any qualification response marked as a trade secret in its entirety will be considered non-responsive and will be rejected.

17.0 Project Termination:

OSU is seeking to award a consultant's agreement to a firm for development of the SFP; however, OSU reserves the right to terminate the project and the agreement, at any phase in the project.

18.0 Insurance Provisions:

During the term of the resulting contract, the successful respondent will be required to maintain in full force, at its own expense, from insurance companies authorized to transact the business of insurance in the state of Oregon, each insurance coverage/policy as set forth in the Agreement.

19.0 Additional Requirements:

Pursuant to OSU Standard 580-061-0030, by submitting a qualification response, the respondent certifies that the respondent has not discriminated against Minority, Women or Emerging Small Business Enterprises in obtaining any required subcontracts.

Pursuant to OSU Standard 580-061-0040, respondents are hereby notified that policies applicable to consultants and contractors have been adopted by OSU that prohibit sexual harassment and that respondents and their employees are required to adhere to OSU's policy prohibiting sexual harassment in their interactions with members of OSU's community.

Enclosures:

OSU Sample Consulting Agreement

End of RFQ