



OSU-Cascades Development Opportunity  
Request for Proposals from Interested Parties

**Response due: 3:00 PM (PST) July 11, 2014**

# TABLE OF CONTENTS

## Table of Contents

<b>1. REQUEST FOR PROPOSALS</b>	<b>1</b>
1.1. <i>Overview of the Opportunity and RFP Process</i>	2
<b>2. HIGHLIGHTS OF THE UNIVERSITY AND DESCRIPTION OF THE DEVELOPMENT OPPORTUNITIES</b>	<b>3</b>
2.1. <i>Overview of Oregon State University</i>	4
2.2. <i>Oregon State University – Cascades Campus</i>	4
2.3. <i>The OSU-Cascades development opportunity</i>	6
2.4. <i>OSU’s Goals and Objectives</i>	7
2.4.1. <i>Housing and student life</i>	8
2.4.2. <i>Financial</i>	8
2.4.3. <i>Design and sustainability</i>	8
2.4.4. <i>International student programs and recruitment</i>	9
2.4.5. <i>Community engagement</i>	10
2.5. <i>Proposed development site</i>	10
2.6. <i>Status of the development effort, interim plans, and approvals</i>	11
2.7. <i>Additional OSU P3 Opportunities</i>	12
<b>3. RFP Procedure and Response Requirements</b>	<b>12</b>
3.1. <i>RFP process schedule</i>	12
3.2. <i>Overview of Bidding and RFP Process</i>	13
3.2.1. <i>Qualification Requirements</i>	14
3.2.2. <i>Negotiations</i>	14
3.2.3. <i>Investigation of references</i>	14
3.3. <i>Submittal requirements</i>	14
3.3.1. <i>Team information</i>	14
3.3.2. <i>Technical capability</i>	15
3.3.3. <i>Financial capability</i>	15
3.3.4. <i>Relevant experience</i>	16
3.3.5. <i>References and case studies</i>	16
3.3.6. <i>Approach</i>	16
3.3.7. <i>Workforce Diversity Plan</i>	16
<b>4. Submission Requirements</b>	<b>17</b>
4.1. <i>Quantity of proposal</i>	18
4.2. <i>Required Submittals</i>	18
4.3. <i>Submission Instructions</i>	18

**Oregon State**  
UNIVERSITY

**Cascades**

1. REQUEST FOR PROPOSALS



## 1.1. Overview of the Opportunity and RFP Process

Oregon State University (“the University”) is issuing this Request for Proposal (“RFP”) to solicit responses from interested parties to enter into a unique public private partnership agreement with the University to develop a Live/Learn Center at its Cascades campus in Bend, Oregon. The Live/Learn Center is expected to include more than 100,000 square feet of residential, dining, amenity, and international academic facilities that will provide students the opportunity to reside and study on the OSU-Cascades campus. The University is seeking a private partner to design, build, finance, operate and/or maintain the Live/Learn Center consistent with the University’s objectives. In addition to the Live/Learn Center, the University may elect to include other academic, utility, and parking components of the overall campus development effort in the services sought pursuant to this RFP.

Through this solicitation process, the University is seeking to identify private parties with appropriate qualifications, experience, financial capacity, and a proven track record of executing similar projects. Following the initial stage of this RFP process, the University expects to short-list 2-5 potential private partners to provide detailed proposals to further develop the framework and structure of the potential relationship. Response to this RFP is a pre-requisite to participate in subsequent steps.

Two or more entities may collaborate in submitting a response to this RFP, but a single entity must be designated to contract with the University and be responsible for performance under any future contract.

**Interested parties responding to this RFP must do so no later than 3:00PM Pacific Standard Time (PST) on July 11, 2014. The University may determine at its sole discretion whether to accept any qualifications that are not received by the date and the time set forth in this paragraph. Interested parties should be prepared to respond to subsequent communications on an accelerated schedule.**

The University reserves all rights to amend this RFP process for selecting a private development partner, including the right to terminate discussions with one or all interested parties at any time. In addition, the University reserves its rights to waive defects, irregularities or informalities or accept or reject any part of any response at its discretion. The University may postpone the date on which responses are to be submitted or take any other action that it deems to be in its best interest. The University is not responsible for and will not pay for any costs associated with your submission.

## 2. HIGHLIGHTS OF THE UNIVERSITY AND DESCRIPTION OF THE DEVELOPMENT OPPORTUNITIES



## 2.1. Overview of Oregon State University



Founded in 1868, the University is the state's Land-grant university and is one of only two universities in the U.S. to have Sea-grant, Space-grant and Sun-grant designations. The University is also the only university in Oregon to hold both the Carnegie Foundation's top designation for research institutions and its prestigious Community Engagement classification.

As Oregon's leading public research university, with \$263 million in external funding in the 2013 fiscal year, the University's impact reaches across the State and beyond. With 12 colleges, 15 Agricultural Experiment Stations, 35 county Extension offices, the Hatfield Marine Science Center in Newport and OSU-Cascades in Bend, the University has a presence in every one of Oregon's 36 counties, with a statewide economic footprint of \$2.06 billion.

The University welcomes a diverse student body of nearly 29,000 students from across Oregon, all 50 states and more than 100 countries. They can choose from more than 200 undergraduate and more than 80 graduate degree programs, including over 30 degrees online offered through the University's ECampus. The University increasingly attracts high-achieving students, with nationally recognized programs in areas such as conservation biology, agricultural sciences, nuclear engineering, forestry, fisheries and wildlife management, community health, pharmacy and zoology.

The University also ranks high in sustainability, fourth among universities nationwide for using renewable energy and first in the Pac-12 Conference. OSU students literally help power the university: 22 exercise machines at Dixon Recreation Center are connected to the grid.

The 400-acre main campus in Corvallis includes a Historic District, making the University one of only a handful of U.S. college campuses listed on the National Register of Historic Places. The district includes such icons as Weatherford Hall, the Memorial Union and Benton Hall, the oldest building on campus.

The University's main campus is located in Corvallis, a vibrant college town of 55,000 in the heart of Western Oregon's Willamette Valley. Corvallis consistently ranks among the best and safest cities to live in the U.S., as well as among the most environmentally responsible.

More information on the University is available at [www.oregonstate.edu](http://www.oregonstate.edu).

## 2.2. Oregon State University – Cascades Campus

OSU-Cascades is a branch campus of the University that provides students personalized instruction and the University's excellence in academics and innovative research, as well as the lifelong advantages of a premier research university. OSU-Cascades is the University's first and only branch campus in Oregon, and the only baccalaureate and graduate degree granting institution based in Central Oregon.

OSU-Cascades is creating a new four year university located in Bend, Oregon, following the endorsement by the Oregon University System in August 2012. The Oregon State Legislature approved capital funding in July 2013 that enables OSU-Cascades to establish its own campus as it expands to offer freshman and sophomore classes. OSU-Cascades anticipates completing the first phase of its campus development in the Fall 2016.

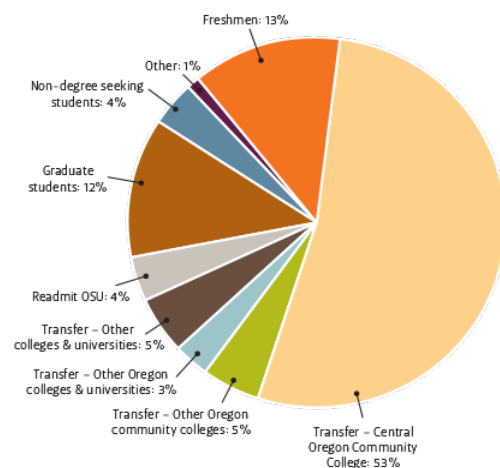
OSU-Cascades opened in 2001 with initial facilities located on the Central Oregon Community College (“COCC”) campus and currently has an enrollment of nearly 950 students. It offers undergraduate degrees in 18 programs and graduate degrees in two programs. Enrollment is expected to grow between 5-15% per year with targeted enrollment of 5,000 by 2025.

OSU-Cascades' expansion is a key component of the strategy to help the University meet State educational attainment, or "40-40-20" goals where 40 percent of Oregonians will have a bachelor's degree by 2025. The goals will increase opportunities for Oregonians' individual success and economic mobility, and for civic and economic contributions to the State.

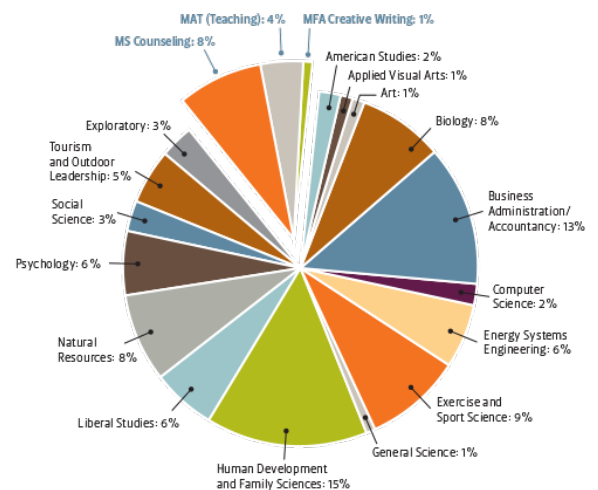
OSU-Cascades serves a variety of students and increasingly attracts students from out of the region. Some statistics about currently enrolled students:

- **Most are from Central Oregon**
- **32% attended local high schools**
- **Students are slightly older than traditional university students**
- **More than 75% are enrolled full-time**
- **Women comprise 56% of undergraduate students**
- **About 15% of students self-identify as representing a minority**

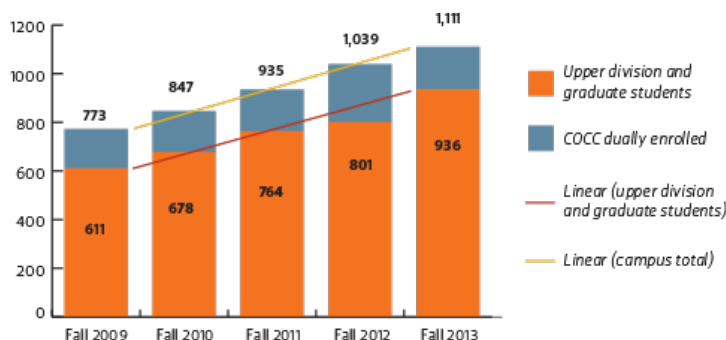
Student Type (Fall 2013)



Major Areas of Study (Fall 2013)



Enrollment: Headcount (2008-2013)



Of the more than 40 full-time faculty, there is a Distinguished Professor of Art History, a Fulbright Fellow and Max Planck Institute for Economics research fellow, a finalist for the

Oregon Non-Fiction Book of the Year award, a Fellow of the International Canadian Studies Institute, as well as published authors.

A low student-to-teacher ratio at OSU-Cascades attracts faculty who excel in classroom instruction and who serve as mentors to students and graduates throughout their academic and professional careers.

In addition to teaching, many faculty members assume research responsibilities that include directing laboratory environments such as the FORCE Lab and the Energy Systems Lab.

Faculty and curriculum at OSU-Cascades adhere to, or exceed, the University's standards for academic rigor and excellence.

OSU-Cascades faculty includes full- and part-time instructors and professors. The faculty provides students with real-world experience, research, scholarship and outreach into the classroom. About three to five part-time instructors teach within each academic program.

As Oregon's Land-grant university, the University requires a service component of faculty. OSU-Cascades faculty provides research and expertise to businesses and organizations throughout Central Oregon. Since 2001, OSU-Cascades has partnered with more than 150 businesses, government and non-profit agencies, and public schools to provide student internships and practicums.

A shared campus for undergraduate programs allows students to begin studies at COCC and continue upper-division coursework and degree completion at OSU-Cascades.

To learn more about OSU-Cascades, see [www.osucascades.edu](http://www.osucascades.edu).

### 2.3. The OSU-Cascades development opportunity

The University is offering potential partners a unique opportunity to work with a leading PAC-12 institution to design, build and potentially be engaged in operational components of its new campus in Bend. The University is willing to think outside the box from the beginning of the development process and to allocate responsibilities for capital investment, operating functions, and components of the overall project to the party best capable of meeting its overall objectives. The University seeks a relationship with a potential private sector partner it anticipates to be long-term, beneficial to both parties, and fully aligned and incentivized to accomplish the University's objectives.

As OSU-Cascades transforms to a 4-year residential campus, the University seeks a private partner who is interested in the distinctive opportunity to not only provide competitive on-campus housing to students, but to be a part of an innovative campus creation process at a major research university. The University seeks a private partner who can contribute substantially to the University's vision and plan for what the Cascades campus will be.



Primarily, the University is seeking a private partner to design, build, finance, operate and/or maintain the Live/Learn Center consistent with the University's objectives. The initial residential development should have capacity for 300 students. The new residences would provide a comfortable, safe and secure residential environment with amenities comparable to peer institutions and serve as an environment to support students' academic success. These residences must be ready for occupancy by the fall of 2016.

In addition to the Live/Learn Center development opportunity, the University will consider the inclusion of other academic, utility, and parking components of the overall campus development effort so long as they create value for the University and are consistent with its objectives.



## 2.4. OSU's Goals and Objectives

OSU-Cascades desires to create a unique campus environment that inspires and engages the community by:

- Providing facilities on the leading edge of current collaborative educational learning and office environments that encourages interdisciplinary dialogue among students, faculty, staff and the community
- Promoting and demonstrating the importance of resource stewardship with respect for place, people, and community through sustainable development and practices; and
- Defining an architecture that is warm and welcoming; utilizing materials that reflect and are complimentary to the resources of Central Oregon's high desert environment; and exhibiting a character that supports openness and accessibility to the campus and

broader community.

In addition to the goals and objectives outlined above, please consider the following specific considerations when forming your responses to this RFP.

#### 2.4.1. Housing and student life

The University's housing mission to provide a living-learning environment as a gateway for academic and personal success through inclusive and innovative programs and services.

The strategic goals for OSU-Cascades housing include:

- To promote student development and academic success
- To provide socially just environments for students, staff and campus
- To strengthen alignment with the University's mission and collaboration with university partners

OSU-Cascades will oversee student life programming at the new campus but is willing to allocate responsibilities to a private partner to manage facility operations including housing personnel (salaries and benefits), maintenance, janitorial, utilities, data/phone, furniture reserve, marketing, and advertising.

#### 2.4.2. Financial

The University recognizes that OSU-Cascades is a first time residential campus and may require financial support from the University. However, the University seeks to minimize the level and term of any potential financial contribution or guarantee it will dedicate to the project.

#### 2.4.3. Design and sustainability

OSU-Cascades has established the aspirational goal of creating a campus that shows leadership in both educational quality and innovative thinking and will develop facilities that have longevity, flexibility and long-term operational sustainability that support and reflect those goals in the facility development. The following have been the basis for the design effort completed to date:

##### ***Design Goals and Objectives:***

- Create buildings that are welcoming, allow all of their users to engage with their exterior surroundings through meaningful window placement and provide transparency.
- Design buildings to respond both to the natural and built elements of Central Oregon, creating variety and richness without losing a sense of cohesion as a campus identity.
- Use exterior building materials and massing that integrate visually with the surrounding landscape.
- Design buildings and other facilities within or adjacent to clusters, using massing, height, materials and color that relate sensitively to each other and to the natural surroundings. Avoid free-standing buildings as objects in landscape.

- Emphasize pedestrian spaces and paths when planning building clusters. Create open spaces as welcoming destinations that have optimal sun exposure and encourage congregation and activity.
- Find opportunities when siting and designing building clusters to improve disabled access through the campus.

Establishing the OSU-Cascades campus provides the opportunity to define a campus that acts as a model for sustainable building, energy efficiency, community connections, state of the art learning practices, and cutting edge technology. Not only will this opportunity represent a chance for local innovation and leadership, the campus can serve as a laboratory of innovation, prototype and potential template for other universities across the nation and around the world.

### *Sustainability Goals:*

- Design a campus that honors and enhances human and natural communities of Central Oregon and is woven into the fabric of both.
- Build a campus that demonstrates innovation and leadership in energy and resource use, community integration and outstanding learning experiences for students, all in a financially viable manner. The campus will inspire external investment as a component of a long-term financial strategy.
- Design and operate a campus that is transformative for visitors, faculty, staff, students, and the community. The campus will inspire the Central Oregon community to live more sustainably by leading and educating through example.
- Design and operate a campus that firmly establishes a new transportation model which de-emphasizes single occupancy motor vehicle use and increases the acceptance of a broader array of transportation options.

### *Sustainability Objectives:*

- Become the nation's first net zero energy, net zero waste, and net-zero water university campus. At a minimum, all new buildings shall be designed to meet a fossil fuel, GHG-emitting, energy consumption performance standard of 75% below the regional average/median for that building type.
- Develop a campus atmosphere that is not dominated by the motor vehicle as measured by a modal split where more than 50 percent of campus transportation needs are met by alternative modes.
- Invite private sector entities to the campus for the specific purpose of providing amenities that will keep students, faculty and staff on campus and entice members of the community at large to visit. These amenities (housing options, food and beverage purveyors and entertainment options) will transform the location from a "campus" to a "village" where people live, work, learn, and play. One measure of achievement for this objective will be more than 50% of enrolled students will live on campus.
- Integrate important components of local and regional culture, from both the present and the past, into every building and the campus landscape.

#### 2.4.4. International student programs and recruitment

In 2008, Oregon State University established the INTO OSU joint venture with the

international student recruiting firm INTO. INTO, based in the UK, was founded with the mission to improve global access to education and establishes partnerships with universities in the UK, US and China. As a result of the INTO OSU joint venture, international enrollment at OSU has more than tripled from 988 to 3,149 students in the four year period 2008-2012. OSU-Cascades intends to leverage this success and relationship with INTO to recruit new students at its Bend campus.

INTO will be an important partner to OSU in the development effort outlined in the RFP as the INTO students will be users of the new Live / Learn Center.

#### 2.4.5. Community engagement

The development of the Cascades campus is being accomplished in collaboration with the City of Bend to maintain a positive relationship between the University and the City and its residents.

### 2.5. Proposed development site

To complete the first phase of the new Cascades campus, the University has purchased a 10.44 acre site in Bend and is currently in the site planning and design process, and is proceeding through the entitlement process with the City of Bend. The site along with the proposed layout of the various buildings is illustrated below.



## 2.6. Status of the development effort, interim plans, and approvals



The design process for the Phase One of the OSU-Cascades campus development began in December 2013, in preparation of a City of Bend land use entitlement application. Selection of architectural teams were conducted to support preliminary design for the 10-acre site planning and academic building along with design for residential/student life amenities and international academic programs with a preliminary development partner. Programming and schematic design were completed in March 2014 and a site plan / design review application submitted to the City of Bend. The application was deemed complete as of April 29, 2014. Documents under review by the City of Bend are available for viewing.

Current design documentation for the main academic and administrative facilities and the residential/student life amenities and international academic programs has been completed through approximately 75% design development. These documents will be available to Proposers to utilize and improve upon as they feel appropriate so long as modifications thereto do not impact the entitlement process with the City of Bend. Initial documents describing these plans are included in Exhibit II to this RFP. The University expects that costs incurred to date for the effort will be included in the overall project costs.

Below are the project schedule milestones, pending the City of Bend process for public hearing of the site plan application and potential appeal process. If additional appeals are submitted to the State of Oregon Land Use Board of Appeals (LUBA), design development could be delayed to begin in March 2015. Any modification of proposed design currently under review could significantly impact the campus development schedule if resubmittal is necessary.

<b>EVENT</b>	<b>DATE</b>
Schematic Design	Jan. – Mar. 2014
Submittal of Final Site Plan and Design Review Application	Apr. 29, 2014
Type III Land Use Entitlement Process (if appealed to City Council)	June - Sept. 2014*
Design Development Begins	Oct. 10, 2014*
Permit and Bid Phase	Mar. – Apr. 2015*
Anticipated Site / Building Construction	May 2015 – July 2016*
OSU Move-in	August 2016*
(*) Dates are contingent on Land Use Entitlement Process schedule	

## 2.7. Additional OSU P3 Opportunities

In addition to the Cascades campus development outlined in this RFP, Oregon State University is also in the process of finalizing an RFP from potential private partners for the planning and eventual design and construction of additional student housing at OSU's Corvallis campus. The proposed development seeks to provide family, graduate and upper class student housing with minimal financial obligation to the University, while ensuring that the facilities and programs align with its mission and expectations. Proposers to this RFP are encouraged to familiarize themselves with this additional OSU opportunity.

## 3. RFP Procedure and Response Requirements

### 3.1. RFP process schedule

The anticipated schedule for the RFP process is as follows (subject to change at the discretion of the University):

<b>EVENT</b>	<b>DATE</b>
Release of this RFP	June 13, 2014
Deadline for questions	June 25, 2014
Phase 1 RFP responses due	July 11, 2014
Phase 1 RFP selection of at least 2 and no more than 5 qualified private partners	July 18, 2014
Phase 2 RFP documents issued to shortlisted parties/finalists	September 2, 2014
Phase 2 RFP responses due	September 19, 2014
Finalist selected	October 6, 2014
Complete negotiations with Finalist	December 1, 2014

### 3.2. Overview of Bidding and RFP Process

The purpose of this first phase of the RFP is to identify interested parties that have the qualifications, experience, and financial capacity necessary to assume the responsibilities of the University's private development partner.

The University's evaluation of each proposal will be based upon the information provided in your response; additional information requested by the University, information obtained from references and independent sources, and formal presentations if requested.

Proposers that are deemed qualified by the University in Phase 1 of the procurement will be provided with additional information concerning the proposed development in the second phase of the proposal process. Qualified Proposers may also be asked to submit preliminary, non-binding proposals for evaluation. Qualified Proposers will have the opportunity to conduct due diligence of the Cascades campus through:

- i. Campus tours and additional inspections by Proposer representatives.
- ii. Management interviews, presentations, or other evaluative method that is relevant to the services solicited in this RFP. Written invitations will contain the evaluation criteria and scoring that will be used by the evaluation committee.
- iii. Review and discussion of the proposed Business terms that will form the relationship between the University and the private partner
- iv. Engage in oral or written discussions with and receive best and final proposals from all qualified proposers. Discussions may be conducted for the following purposes:
  - Informing firms of deficiencies in their initial proposals;
  - Notifying firms of parts of their proposals for which the University would like additional information; or
  - Otherwise allowing firms to develop revised proposals that will allow the University to obtain the best value proposal based on the requirements set forth in this RFP. The conditions, terms, or price of the proposal may be altered or otherwise changed during the course of the discussions.
- v. Following this due diligence process, final and binding proposals will be submitted in accordance with procedures and evaluation criteria to be provided to Qualified Proposers in the Phase 2 of the RFP.

#### **a. Additional stages of evaluation:**

If after completion of the second stage of evaluation, an award is not made, the University may add another stage of evaluation using any of the methods outlined in the second stage evaluation above.

### 3.2.1. Qualification Requirements

This RFP is open to prospective parties who seek qualification to pursue a development of the Oregon State University Cascades campus. Qualification will be based on a determination by the University at its discretion that the interested party meets the requirements highlighted in Section 3.3. Upon receipt, all RFP submissions will be reviewed for completeness in accordance with the submission requirements, and assessed in the areas of technical and financial capability, relevant project experience, and references with respect to the standards set forth in this RFP. After reviewing all proposals, the University intends to shortlist between 2 to 5 qualified bidders.

### 3.2.2. Negotiations

Through this RFP process, the University may commence serial negotiations with the highest-ranked firm or commence simultaneous negotiations with all eligible firms. OSU may negotiate:

- a. The statement of work;
- b. The contract price as it is affected by negotiating the statement of work; and
- c. Any other terms and conditions determined by the University in its sole discretion to be reasonably related to the terms of this RFP.

### 3.2.3. Investigation of references

The University reserves the right to investigate and to consider the references and the past performance of any firm with respect to such things as its performance or provision of similar goods or services, compliance with specifications and contractual obligations, and its lawful payment of suppliers, subcontractors, and workers. The University further reserves the right to consider past performance, historical information and facts, whether gained from the proposal, interviews, references, or any other source in the evaluation process. The University may postpone the award or execution of a contract after the announcement of the notice of intent to award in order to complete its investigation.

## 3.3. Submittal requirements

The following constitute the submittal requirements and evaluation criteria for the selection committee to score responses. **Your proposal must respond to each criterion in numerical order.** For ease in evaluating the responses, please provide tabs keyed to each of the following criteria numbers. Indicate in writing the following information about your firm's ability and desire to perform this work.

### 3.3.1. Team information

- A. **Description of proposer:** Provide a description of the proposing "Team," including a description of all "Team Members" and the anticipated legal relationship (governance and capital structure) among the Team Members (e.g., partners, shareholders, client-consultants, subcontractors, etc.) as appropriate. All equity investors should be identified.
- B. **Role of team members and key personnel:** Briefly outline the roles of the Team Members and key personnel.



- C. **Operator:** Specifically identify the entity or entities that will act as operator under any proposed concession and lease agreements.
- D. **Contact person:** Provide a single contact person for all future communication between the Advisor and the Team. Please identify the contact person's name, title, organization, address, telephone number, fax number, and e-mail address.
- E. **Controlling interest:** Identify the individuals or companies who hold a major or controlling interest in each Team Member.
- F. **Expected advisors:** Identify the companies and individuals who are expected to act as legal, financial, or other advisors for the Team.

### 3.3.2. Technical capability

- A. **Operations and maintenance experience:** Teams must provide evidence demonstrating their ability to operate and maintain a project of this nature and scope. Specifically, the Team should have:
  - a. Substantial university facility maintenance and operation experience;
  - b. Advanced knowledge of campus facilities maintenance, repair, construction, and practical application of equipment and materials in facility operations;
  - c. Demonstrated understandings in facility aging behavior to assess and determine the applicability of remedial maintenance action;
  - d. All capabilities necessary to successfully maintain the campus including routine maintenance, operations, management, management and operations.
- B. **Student services:** Teams must demonstrate their commitment to achieving the highest standards of student service and satisfaction. Specifically, the Team must highlight its experience and qualifications providing excellent customer service to university students. Teams may at their option include additional information concerning their experience in maintaining productive ongoing relationships with universities, similar to the relationship that the winning Private Operator will have with Oregon State University.
- C. **Capital improvements:** Teams must demonstrate their ability to efficiently undertake required capital improvements to the Cascades campus during the term of the proposed lease and/or concession agreement.

### 3.3.3. Financial capability

- A. **Financial capacity:** Teams must demonstrate their financial capacity to maintain the new Campus over the term of the agreement. To demonstrate sufficient financial capacity, Team Members must provide copies of audited financial statements for the past three years together with any other relevant financial information. If audited financial statements cannot be provided, Team members should provide enough financial information to demonstrate that they have the financial resources to successfully execute a project of this nature and scope.
- B. **Ability to raise financing:** Teams must provide specific evidence demonstrating their ability to raise financing for a project of this nature and scope. Specific factors that will be assessed include:

- a. Capability of raising debt and equity in the current capital market;
- b. The number and size of past relevant university transactions; and
- c. Specific experiences on past relevant university transactions.

#### 3.3.4. Relevant experience

Provide a list of at least 3 comparable projects at universities and/or peer institutions in which Team Members have participated. Proposers should specify how these comparable projects relate to the proposed project outlined in this RFP. Evidence should include brief project descriptions, a statement regarding the duration of your financial and operational involvement with each such project following completion; and the name, address, and telephone number of a primary contact with knowledge of the project. Project examples should include capital budget information and number of beds to allow comparison of the cost of various levels of student housing quality. The University is most interested in seeing projects which you conceptualized, financed, and constructed from the ground up or developed a specific area and then managed and operated the space.

#### 3.3.5. References and case studies

Provide 3 case studies that exemplify your firm's value added to similar projects. Include information on your firm's role, the size of the project and which team members from your proposed team worked on the project. For each case study, please provide a reference that is familiar with your firm's work throughout the project.

#### 3.3.6. Approach

Realizing that the project approach will start to be solidified during the negotiation phase with the successful proposer, describe a probable project approach. Discuss how you will advance the project's requirements, build on work completed to date, or otherwise add distinctive value to the University. Include a possible project schedule depicting key milestones, durations, and dependencies tied to a completion date of August 1, 2016.

#### 3.3.7. Workforce Diversity Plan

Provide a description and identification of Minority Business Enterprise (MBE), Women Business Enterprise (WBE) or Emerging Small Business (ESB) certifications for your firm and a description of your nondiscrimination practices. Provide any historical information on MBE, WBE or ESB Joint Ventures, subcontracting or mentoring plan, and utilization history for projects completed within the past three (3) years.

Provide a narrative description of your current workforce diversity program/plan, and the plan for obtaining partner, 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 firms needing or requesting such services.

#### 4. Submission Requirements



#### 4.1. Quantity of proposal

For the initial qualifications stage, submit one (1) original hard-copy and one (1) electronic copy (via CD/DVD/flash drive) of the qualifications portion of your proposal that can be readily disseminated among the University's evaluation committee members as well as one (1) electronic copy (via CD/DVD/flash drive) to the University's financial advisor, Public Financial Management, Inc. The hard copy should be submitted on 8.5" x 11" sized paper to make reproduction feasible as needed by the University and should not exceed 35 single sided pages, including pictures, charts, graphs, tables and text the firm deems appropriate to be part of the review of the firm's response. Resumes of key individuals should be appended to the end of your response, and will not be counted in the 35 page limit along with a cover letter, table of contents, front and back covers, and blank section/numerical dividers, etc. No supplemental information to the 35 page Proposal will be allowed. The hard copy should contain original signatures of an officer of your firm with authority to commit your firm. Proposals should contain the submittals listed in the section below and information should be presented in the same order as the requirements listed in Section 3.3 of this RFP.

#### 4.2. Required Submittals

It is your sole responsibility to submit information in fulfillment of the requirements of this RFP. If pertinent information or required submittals are not included within your proposal, it may cause your proposal to be rejected or have an adverse impact on evaluation.

Proposals should include the following information:

- Cover Page (to include identification of all Team Members)
- Cover letter (maximum of 2 pages)
- Table of Contents
- Detailed information about how your firm meets the requirements detailed in section 3.3

#### 4.3. Submission Instructions

Copies of the qualifications stage of your submission should be delivered to the representative at the address shown below no later than 3:00PM PST, on July 11, 2014.

Submitted to:	Copy to:
<b>Mike Green</b> <i>Associate Vice President Finance and Administration</i> Oregon State University P.O. Box 1086 Corvallis, Oregon 97339-1086 Ph. (541) 737-2092 <a href="mailto:michael.green@oregonstate.edu">michael.green@oregonstate.edu</a>	<b>Tom Morsch</b> <i>Managing Director</i> Public Financial Management, Inc. 222 North LaSalle Suite 910 Chicago, IL 60601 Ph. (312) 523-2436 <a href="mailto:morscht@pfm.com">morscht@pfm.com</a>

All questions or requests for information regarding this RFP should be directed only to Tom Morsch and Mike Green via e-mail. In addition, parties intending to respond should e-mail the above individuals soon as possible.

Interested parties should not contact any other parties of the University, its Student Housing program, or advisors of these entities with regard to this opportunity. Interested Parties are advised that unauthorized contacts with officials or related parties of the University may result in elimination of an Interested Party from this RFP process.

Receipt of each submission will be acknowledged via e-mail.

**Addenda.** Any addenda or instructions issued by the University prior to the time for receiving proposals shall become a part of this proposal. Such addenda shall be acknowledged in the proposal. No instructions or changes shall be binding unless documented by a proper and duly issued addendum. The University is under no obligation to contact proposers for clarification but reserves the right to do so.

### **Solicitation Protests.**

Respondents may submit a written request for change or protest of particular solicitation provisions (including comments on any provisions that a firm believes limits competition) to Mike Green at the address or email listed in this document. Such requests for change and protests shall be received no later than 3:00 p.m. (PST), June 18, 2014. Such requests for change and protests shall include the reasons for the request and any proposed changes to the solicitation provisions.

### **Selection Protests.**

Any respondent to this RFP who claims to have been adversely affected or aggrieved by the selection of a competing respondent shall have three days after notification of that selection to submit a written protest of the selection to Mike Green at the address or email listed in this document. Any such protests must be received no later than three days after the selection has been made.

**Disclaimer.** The University reserves the right to request additional information, or clarifications of material submitted by your firm during the RFP selection process.

Any representations or statements made within this RFP shall not be considered a contractual obligation by the University and your firm shall not be entitled to rely upon them. The University reserves the right to reject any and all submittals and to identify and select the firm which the University, in its sole and absolute discretion, deems most qualified.

The respondents shall be solely and totally responsible for all costs associated with responding to this RFP, and the University accepts no responsibility with regard thereto. Submissions will become the property of the University.

**Public Record.** The University shall retain this RFP and one copy of each original 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 shall be open to public inspection after selection and award is announced. If a response contains any information that is considered a trade secret under ORS 192.501(2), mark each sheet of such information with the following legend: **“This data constitutes a trade secret under ORS 192.501(2), and shall 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 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 response, material designated as confidential shall accompany the response, but shall be readily separable from it. Prices, makes, model or catalog numbers of items offered, scheduled delivery dates, and terms of payment shall be publicly available regardless of any designation to the contrary. Any response marked as a trade secret in its entirety shall be considered non-responsive and shall be rejected.

**Project Termination.** The University is seeking to award a contract or contracts to a firm for the project as described in this RFP; however, the University reserves the right to terminate the project or contract during any phase in the project.

**Certification of Nondiscrimination and Compliance with Tax Laws.** By submission of its proposal, your firm thereby certifies under penalty of perjury that the undersigned is authorized to act on behalf of your firm, as part of its proposal, has not discriminated against minority, women or emerging small business enterprises in obtaining any required subcontracts, and that your firm is, to the best of the undersigned’s knowledge, not in violation of any Oregon Tax Laws. For purposes of this certification, “Oregon Tax Laws” means a state tax imposed by ORS 320.005 to 320.150 and 403.200 to 403.250, ORS chapters 118, 314, 316, 317, 318, 321 and 323; the elderly rental assistance program under ORS 310.630 to 310.706; and local taxes administered by the Department of Revenue under ORS 305.620.

