



**Oregon State  
University**

## Attention Consulting Firms

**If you are downloading the RFP from the website,  
continue to monitor the website for addenda.  
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considered non-responsive.**

**Thank you.**

# OREGON STATE UNIVERSITY

## REQUEST FOR PROPOSALS

OSU-Cascades Innovation District Economic Feasibility Study

ISSUE DATE: September 21, 2018

RFP CLOSING (DUE) DATE: Monday, October 15, 2018. 2:00 PM, Pacific Time

NO LATE RESPONSES WILL BE ACCEPTED

**CONTRACT ADMINISTRATOR:**

Brooke Davison, Construction Contract Officer  
Construction Contract Administration  
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**SOLICITATION / SELECTION PROTESTS:**

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RFP Response due October 15, 2018, 2:00 PM, Pacific Time

## 1.0 Introduction:

Oregon State University (OSU) is seeking proposals from consultant teams for an economic feasibility study of a university innovation district development at OSU-Cascades in Bend, Oregon. The consulting firm is free to sub-contract as necessary to ensure a complete team.

Scope of services will include the following: identification of development opportunities, evaluation of demand and revenue streams, a cost-share strategy for land development, and an early assessment of public private partnership (PPP) potential for any of the development opportunities.

The projected total contract value is expected to be approximately \$75,000.00.

## 2.0 Background:

Founded in 1868, Oregon State University is a comprehensive, research-extensive, public university located in Corvallis, Oregon. OSU is one of only two American universities to hold the Land Grant, Sea Grant, Space Grant and Sun Grant designations. OSU is also the only institution to have earned both Carnegie Foundation classifications for Highest Research Activity and Community Engagement, recognition of the depth and quality of OSU's graduate education and research programs.

Through its centers, institutes, Extension offices and Experiment Stations, OSU has a presence in all of Oregon's 36 counties, including its main campus in Corvallis, the Hatfield Marine Sciences Center in Newport and OSU-Cascades campus in Bend. OSU offers undergraduate, master's and doctoral degrees through 11 academic colleges, the Honors College, Graduate School and online E-Campus, enrolling more than 31,000 students from every county in Oregon, every state in the country and more than 110 nations.

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

OSU-C expansion will help OSU 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. The branch campus plans to expand to 3,000 students in the next 10 years.

OSU-C completed a Long Range Development Plan (LRDP) and City of Bend master plan in April 2018. This plan for the future physical framework will support the university's culture of innovation, sustainability, and wellness. The LRDP accounts for 1,200,000

gross square feet (GSF) of new space, including 605,000 GSF of academic and student life space, and 1,700 new student residential beds to be built over the next twenty (20) or more years. Additional site elements include the potential for a public recreation center, early learning center and K-5 school, and a 380,000 GSF Innovation District. (Enclosure: LRDP)

The OSU-C Fall 2017 campus enrollment was 1,204 students. Campus enrollment at full build-out is planned at 5,000 students. OSU-C is a comprehensive university with programs in arts and technology, education, engineering, enterprise, field science, lab science, health and wellness, liberal and social sciences, and humanities. At full build-out, the campus will employ more than 700 faculty and 200 staff positions.

The master plan, approved by the City of Bend, includes pre-negotiated on and off-site transportation improvements to support the incremental trips to and from the campus. Each of these improvements are tied to a specific phase of development and cannot be changed unless there is a master plan change or OSU-C exceeds a 2034 development time horizon. The campus building development is contemplated over five (5) phases. Each phase includes buildings, infrastructure, and offsite improvements. Land development, including site remediation is contemplated in three (3) phases based on funding availability. The first phase is expected to begin in October 2018.

As the OSU-C campus is to be built on a former demolition landfill, extensive environmental, civil and geo-technical engineering analyses were completed for the site. Based on the engineering analysis, cost estimates for environmental remediation, grading and filling the site were completed. In addition, environmental protections were pre-negotiated with the Oregon Department of Environmental Quality and the prior land owner.

In support of the land and campus development strategy, there is a coordinating 10-year capital forecast. Cost estimates have been developed for building, infrastructure and land development.

In addition to the core academic and student success buildings, the future campus will host a partnership buildings and an innovation district. An innovation district (District) will integrate university academic programs and research with industry and entrepreneurs. It will leverage the fast growing and entrepreneurial economy of Central Oregon with a dynamic and innovative university. Innovation districts are increasingly prevalent across the country and world. The Brookings Institute ([www.brookings.edu/wp-content/uploads/2016/07/InnovationDistricts1.pdf](http://www.brookings.edu/wp-content/uploads/2016/07/InnovationDistricts1.pdf)) defined innovation districts as “geographic areas where leading-edge anchor institutions and companies cluster and connect with start-ups, business incubators and accelerators. They are also physically compact, transit-accessible, and technically-wired, and offer mixed-use housing, office and retail.” These Districts attract companies in the knowledge economy that want to be near other companies, universities, and research labs to share ideas and spur innovation.

OSU-C District is a figurative handshake between academic-led instruction and research and industry-led innovation. The District will offer the physical environment for industry to invent and create in proximity and collaboration with other entrepreneurs. And as per the Brookings Institute, “[i]nstead of inventing on their own in real or metaphorical garages, an array of entrepreneurs are starting their companies in collaborative spaces, where they can mingle with other entrepreneurs and have efficient access to everything from legal advice to sophisticated lab equipment. Rather than submitting to long commutes and daily congestion, a growing share of metropolitan residents are choosing to work and live in places that are walkable, bike-able, and connected by transit and technology.” Industry would have access to shared resources including an incubator, funders, operational support, collaboration space, technology and high-level analytical support (e.g. data analysis, market research) available in the District.

### 3.0 Description of Services Sought:

The selected Consultant will assess the development opportunities for partnership buildings and an innovation district as described in the campus LDRP. The District is envisioned to be an urban mixed-use environment that is comprised of industry and research partners that have strategic, symbiotic connections with the university. It will be a figurative handshake between academic-led instruction and research and industry-led innovation. The District will integrate retain academic research, housing, and commercial support or shared services. Beyond the District, the campus LRDP provides for university and community shared use of the site. This engagement is meant to explore new revenue potential and options.

OSU-C anticipates the deliverables to be:

1. Market study for potential development opportunities for the District in Bend and Central Oregon.
2. Valuation analysis for selected development opportunities, these may include, but are not limited to the following:
  - a. Master land lease
  - b. Build to suit lease for commercial use
  - c. Health and recreation center and outdoor recreation field lease
  - d. Conference center
  - e. Hotel
  - f. Multi-family middle market housing (\$45-90K household incomes)
  - g. Central utility plant, solar panel, and/or geo-exchange energy production and purchasing
  - h. Data center
  - i. Senior living community.
3. Cost share strategy for land development and remediation of landfill.
4. Feasibility study for use of PPP for selected development opportunities.

### 4.0 Timeline

Work will commence upon selection of the consulting team. The suggested timeline and

key milestones are as follows:

1. November 2018 – Steering Committee Meeting #1 – Project Kickoff
2. December 2018 – Steering Committee Meeting #2
3. January 2019 – Steering Committee Meeting #3
4. February 2019 – Steering Committee Meeting #4 – Final Presentation
5. March 2019 – Final Deliverables

## 5.0 Proposer Qualifications

In order to qualify as a responsive proposer, the proposer needs to meet the minimum qualifications below.

- a. Demonstrated experience developing revenue projections for two (2) or more of the identified partnership opportunities or innovation district projects in Section 3.0 above.
- b. Demonstrated experience developing financial evaluation models.
- c. Demonstrated experience evaluating PPP models.

OSU will award additional points for proposers able to meet the preferred qualifications below.

- d. Demonstrated experience working with institutions of higher education.
- e. Demonstrated experience developing revenue projections for five (5) or more of the identified innovation district projects in Section 3.0 above.

## 6.0 Selection Process:

This Request for Proposals selection process will be conducted pursuant to the terms of this RFP and OSU Standard 580-063-0020, relating to the selection and retention of professional consultants. Once the proposals have been reviewed and scored, the top three (3) to five (5) firms will be invited participate in on-site interviews.

## 7.0 Compensation:

Compensation will be based on a total “not-to-exceed” amount for services and reimbursable expenses, with “not-to-exceed” maximums for the services required.

## 8.0 Evaluation Criteria:

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

- 8.1.1 Provide a brief description of your firm and the focus of the practice. List the projects your firm is currently contracted for and at what stage the projects are in terms of completion. Also include your firm’s total dollar volume for each of

- the last five years. (Weight: 5)
- 8.1.2 Describe how your firm meets the requirement of Section 5.0 a. above. (Weight: 25)
- 8.1.3 Describe how your firm meets the requirement of Section 5.0 b. above. (Weight: 25)
- 8.1.4 Describe how your firm meets the requirement of Section 5.0 c. above. (Weight: 20)
- 8.1.5 Identify key personnel along with those of a sub-consultants proposed to be assigned to this project. Include proposed key personnel's project experience, with specific examples and identify their roles in the projects. Indicate whether the proposed team has worked together on previous projects. (Weight: 15)
- 8.1.6 Provide proposal for services inclusive of the Description of Services Sought in Section 3.0 above. Proposal shall be on a time and material basis with a total 'not-to-exceed' amount. The proposal shall be inclusive of all services and reimbursable expenses, but with totals for services separate from reimbursable expenses. (Weight: 15)
- 8.1.7 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 historical information on MBE, WBE or ESB Joint Ventures, subcontracting or mentoring plan, and utilization history for projects completed 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: 15)
- 8.1.8 Provide detailed information about how your firm meets the preferred qualifications listed in Section 5.0 d. and e. above. (Weight: 20)

## 9.0 References:

In addition to responding to the evaluation criteria above, provide the names, addresses and phone numbers of three references. Do not include references from any firms or individuals included in your consulting 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.

10.0 Selection Procedure and Timetable:

A mandatory pre-proposal site visit/walk-through will be held on October 3, 2018 at 10:00 AM, Pacific Time. Meet in Room 210 in the Dining Hall, 1500 Chandler Ave., Bend, OR 97702. A representative of each respondent's firm is required to attend. The pre-proposal site visit will be the proposers' main opportunity to discuss the Project with OSU. Proposals will not be accepted from proposers who have not had a representative attend the mandatory pre-proposal site visit/walk through. Attendance will be documented through a sign-in sheet prepared by OSU. Representatives of proposer who arrive more than five (5) minutes after the start time of the meeting (as stated in this solicitation and by the Owner's Authorized Representative's watch) or after the discussion portion of the meeting (whichever comes first) shall not be permitted to sign in and will not be permitted to submit a proposal to this RFP.

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.

September 21, 2018	Issue RFP
October 3, 2018	Mandatory Site Visit, 10:00 AM, Pacific Time Meet in Room 210 of the Dining Hall on the OSU-Cascades Campus, 1500 SW Chandler Ave., Bend, OR 97702
October 15, 2018	RFP response due 2:00 PM, Pacific Time
October 19, 2018	Notification of finalists
October 23, 2018	Interviews with Selection Committee
October 26, 2018	Estimated Notice of Intent to Award
November 16, 2018	Estimated Contract Execution

11.0 Evaluation Process:

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

- a. The proposers' responses to evaluation criteria in Section 8.0 of this document;
- b. Information obtained during an interview of the proposers by the evaluation committee; and
- c. The results of discussions with the proposers' references and others.

Each criterion in the first step of the evaluation process has been assigned a weight

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between five (5) and twenty-five (25). Each member of the evaluation committee will rate each firm in criterion 8.1.1 through 8.1.5 and 8.1.7 between one (1) and five (5) (five being the highest), and multiply that number by the weight assigned to the criterion. The criterion in 8.1.6 will be calculated as follows: the lowest cost proposal will receive a score of 5. All other proposals will be calculated as follows:  $((\text{Lowest Cost Proposal}/\text{Proposal}) \times 5)$  rounded to the nearest quarter point. Each score will then be multiplied by the weight as identified in 8.1.6. Each member of the evaluation committee will rate criterion 8.1.8 above between zero (0) and five (5) (five being the highest), and multiply that number by the weight assigned to that 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 proposers. 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 RFP 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 Proposer. 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:

- Your firm's knowledge of development opportunities in Central Oregon, Bend in particular. What opportunities do you see in the market?
- Describe revenue streams you have seen successfully used by other public institutions to fund major capital projects.
- Use a past project as a case study to describe how you built a revenue model for decision making purposes. What process did you use to develop assumptions? Who was involved in the development? What was the final deliverable that was turned over to the client?
- Describe your experience with setting parameters for infrastructure cost sharing for large development projects.

If, during the discussion, the evaluation 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 proposer as required by this RFP. 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.

#### 12.0 Responsibility Evaluation:

OSU reserves the right to investigate each proposer'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 proposal constitutes the proposer'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 proposers, 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 proposal nonresponsive. Failure of a proposer to demonstrate responsibility will render it non-responsible and constitute grounds for proposal rejection.

#### 13.0 Submission:

Submit **one (1)** hard copy version of your written proposal, 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 13<sup>th</sup> Ave.  
Corvallis, OR 97333

Your proposal must be contained in a document **not to exceed twenty-five (25) pages**, including pictures, charts, graphs, tables and text the proposer deems appropriate to be part of the review of the proposer'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 proposal will be allowed. Appended resumes of the proposed key individuals, along with a transmittal letter, table of contents, front and back covers, references required

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in Section 9.0, 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 proposal 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 proposal 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 proposal not in compliance with all prescribed public bidding procedures and requirements, and may cancel this solicitation or reject for good cause all proposals upon a finding by OSU that it is in the public interest to do so.

Note that OSU will not accept proposals 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.**

**Proposals received after the closing date and time will not be considered.**

#### 14.0 Questions:

All questions and contacts with the OSU regarding any information in this RFP must be addressed in writing or email to Brooke Davison at the address or email listed in this document no later than October 8, 2018 at 5:00 PM, Pacific Time. **Do not contact** any OSU personnel including, but not limited to OSU-Cascades personnel. Ms. Davison is the only point of contact for this RFP.

#### 15.0 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 Contract Manager, at the address or email listed in this document. Requests and protests must be received no later than September 26, 2018 at 5:00 PM, Pacific 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.

### 16.0 Change or Modification:

Any change or modification to the specifications or the procurement process will be in the form of an addendum to the RFP 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 RFP 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.

### 17.0 Selection Protests:

Any proposer to this RFP who claims to have been adversely affected or aggrieved by the selection of a competing proposer may submit a written protest of the selection to Hanna Emerson, Construction Contracts Manager at the address given in the RFP 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](http://bid.oregonstate.edu)).

### 18.0 Proprietary Information:

OSU will retain this RFP, one copy of each proposal received and an electronic copy of each proposal 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 Proposer or all proposals have been rejected. If a proposal contains any information that you consider to be a trade secret under ORS 192.345(2), you must mark each trade secret with the following legend: **"This data constitutes a trade secret under ORS 192.345(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 proposal 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 proposal, material designated as confidential must accompany the proposal, 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 proposal marked as a trade secret in its entirety will be considered non-responsive and will be rejected.

19.0 Project Termination:

OSU is seeking to award a consultant's agreement to a consulting firm for an economic feasibility study however, OSU reserves the right to terminate the project and the agreement, at any phase in the project.

20.0 Insurance Provisions:

During the term of the resulting contract, the successful proposer 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.

21.0 Additional Requirements:

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

Pursuant to OSU Standard 580-061-0040, proposers are hereby notified that policies applicable to consultants and contractors have been adopted by OSU that prohibit sexual harassment and that proposers 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 Consultant's Agreement  
Long Range Development Plan (LDRP)  
Innovation District Summary

End of RFP