



Oregon State University

REQUEST FOR PROPOSAL (RFP) #2020-000529

OSU PUBLIC PRIVATE PARTNERSHIP (P3) PROGRAM EVALUATION STRATEGY ADVISORY SERVICES

ISSUE DATE: August 1, 2019

RFP DUE DATE/TIME: August 23, 2019 at 2:00 PM Pacific Time

***Office is closed Noon to 1:00 PM Daily**

QUESTION DEADLINE: August 8, 2019 at 5:00 PM Pacific Time

CONTRACT ADMINISTRATOR:

Hanna Emerson

Construction Contracts Manager

Construction Contract Administration

Oregon State University

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AWARD DECISION APPEALS:

Kelly Kozisek

Chief Procurement Officer

Procurement, Contracts and Materials Management

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It is the Proposers responsibility to continue to monitor the [OSU Business and Bid Opportunities](#) website for Addenda. Failure to acknowledge any Addenda in the Transmittal Letter may cause your proposal to be considered non-responsive.

OSU standards and policies govern this solicitation ([Procurement Thresholds and Methods, Procurement Solicitations and Contracts](#)) unless otherwise referenced or stated.

1.0 INTRODUCTION

Oregon State University (“OSU” and “Owner”) is conducting a competitive **TWO-STEP** process to retain **ONE** (1) consultant to provide P3 program evaluation strategy advisory services.

OSU will be accepting sealed proposals at Construction Contracts Administration, Oregon State University, 644 SW 13th Street, Corvallis, Oregon, until 2:00 PM Pacific Time, August 23, 2019 for the project.

2.0 BACKGROUND

Founded in 1868 as Oregon’s land grant institution, OSU serves the state, the nation and the world as a premier 21st-century research university. OSU is committed to exceptional research, discovery, innovation and engagement — and to integrating its research and engagement mission with the delivery of a high-quality, globally relevant and affordable education for the people of Oregon and beyond. OSU is one of only two land, sea, space and sun grant universities in the U.S. and is the only university in Oregon to have earned both Carnegie Classifications for Very High Research Activity and Community Engagement.

OSU is one of seven public universities in Oregon. Since 2014, OSU has been served by an independent institutional Board of Trustees, appointed by the governor. The Board of Trustees of Oregon State University governs Oregon’s only university with a statewide presence and helps guide OSU’s mission to serve the state and the needs of its citizens in a growing global economy. The university has been continuously accredited since 1924 and is currently accredited by the Northwest Commission on Colleges and Universities. Many of the university’s degree programs are also approved by other specialized accrediting associations.

OSU welcomes an increasingly diverse student body of more than 32,000 students, including over 5,000 graduate students, from across Oregon, all 50 states and more than 100 countries. The university continues to serve its land grant mission, with Oregon residents making up over 71 percent of degree-seeking undergraduates on the Corvallis campus and 57.4 percent overall. Domestically underrepresented students make up more than 25 percent of OSU’s overall enrollment, and international students represent 11 percent of total enrollment.

Students can choose from more than 200 undergraduate and 100 graduate degree programs, including more than 50 degree and certificate programs offered online. OSU has a national and international reputation for its programs in creative writing, public policy, forestry, oceanography, mycology, marine biology, agriculture, robotics and natural resources. Programs are offered through 11 colleges, the Graduate School and the Honors College, one of only a handful of degree-granting honors programs in the U.S. OSU maintains a rigorous focus on academic excellence, particularly in three signature areas: the science of sustainable Earth ecosystems, health and wellness, and economic prosperity and social progress.

The university’s 570-acre main campus is located in the city of Corvallis, a vibrant college town of nearly 58,000 in the heart of Western Oregon’s Willamette Valley. Corvallis consistently ranks among the safest, most highly educated and greenest small cities in the nation.

In 2001, OSU established a presence in Bend, Oregon, and the OSU-Cascades branch campus expanded to a four-year university when it welcomed its first freshman class in 2015. OSU-Cascades brings quality instruction to Central Oregon students as the only baccalaureate and graduate degree-granting institution in the region. Enrollment at OSU-Cascades has grown to over 1,200 students as of fall 2018, with 67 percent of students from Central Oregon and 31 percent of students who are the first in their family to attend college.

OSU also offers online degrees and courses through the nationally ranked Oregon State Ecampus. More than 1,200 online courses are available to learners throughout the state, the nation and the world. In fall 2018, OSU expanded its long-standing service to the Portland region by opening a center in downtown Portland to support the hybrid delivery of educational programs (online and face-to-face), along with continuing education and outreach and engagement.

OSU programs and faculty are located throughout Oregon. OSU operates 15 Agricultural Experiment Stations, including the Food Innovation Center in Portland and the OSU Seafood Laboratory in Astoria, 35 county Extension offices, the Hatfield Marine Science Center in Newport, and the Oregon Forest Research Laboratory, with 14,000 acres of college forests serving as field classrooms and laboratories.

As Oregon’s largest public research university, with \$382 million in external research funding in 2018, Oregon State’s impact reaches across the state and beyond. The university is a significant contributor to Oregon’s economy and economic development, and its signature areas are a close fit with the state’s needs and priorities. The university’s gross economic impact in 2017 totaled \$2.71 billion. With a vision of leadership among land grant universities in the integrated creation, sharing and application of knowledge for the betterment of humankind, OSU produces graduates, scholarship and solutions that achieve maximum positive impact on humanity’s greatest challenges.

3.0 OSU P3 PROGRAM DESCRIPTION

As OSU begins to look holistically at incorporating P3 into the achievement of the strategic mission on all campuses, an oversight structure is needed internally to evaluate the available opportunities and present them to the President and Provost or delegated authorities for decision making. The program is envisioned to be comprised of multiple levels of review and feedback loops. The selected consultant of this RFP will develop and document the P3 evaluation strategy and decision making framework for the OSU P3 Program.

The OSU P3 Program will be comprised of a Core Team and Executive Advisory Group comprised of internal staff and program consultants. The program consultants include a consulting services business partner, a dedicated attorney representing OSU interests regarding any project considerations on behalf of the university, and a financial advisor to review and validate financial analyses and revenue projections. Dorsey & Whitney LLC has been engaged as the attorney representing OSU and PFM Financial Management has been engaged as OSU’s financial advisor.

4.0 DESCRIPTION OF SERVICES SOUGHT

OSU seeks to retain professional consulting services for the purpose of providing advisory services for a P3 program. Services to assist OSU include development and documenting the evaluation strategy and decision making framework for the OSU P3 Program. A visual graphic of the concept is below.



Anticipated deliverable: Evaluation strategy procedures and decision making framework. This will include a final report which details the process and establishes a rubric which can be used by OSU to guide these types of decisions in the future. The evaluation strategy policy and decision making framework are requested to be completed by January 2020.

5.0 SCHEDULE

The proposals for this RFP will be evaluated/scored by a qualified committee which may include other non-scoring members who serve as advisors but do not score qualifications statements or interviews.

If applicable, interviews of short-listed finalists will occur following the receipt, review and scoring of the responses. In addition, further investigation of references may occur following the committee scoring in a one-step selection process or interviews of the short listed finalists in two-step selection process.

August 1, 2019	Issue RFP
August 8, 2019 at 5:00 PM Pacific Time	Question Deadline
August 12, 2019	Issuance of Final Addenda (if necessary)
August 23, 2019 at 2:00 PM Pacific Time	Submittal Due Date/Time
Week of August 30, 2019	Notification of Finalists (short list)
Week of September 9, 2019	Interviews
Week September 9, 2019	Estimated Notice of Intent to Award
September 30, 2019	Estimated Contract execution
January 2020	Completion of Evaluation Strategy Policy and Decision Making Matrix

OSU will make every effort to adhere to the above schedule. It is however, subject to change.

7.0 INSTRUCTIONS TO OFFERORS

Your proposal must be contained in a document not to exceed **twenty-five (25) pages (double sided preferred on hard copy)** including pictures, charts, graphs, tables and text you deem appropriate to be part of OSU's review of your proposal. Resumes of key individuals proposed to be involved in this Project are exempted from the twenty-five (25) page limit and must be appended to the end of your proposal. No supplemental information to the twenty-five (25) page limit will be allowed. Appended resumes of the proposed key individuals, along with a Transmittal letter, table of contents, front and back covers, references and blank section dividers will not be counted in the twenty-five (25) page limit.

Your proposal must follow the format outlined below and include a Transmittal/Cover Letter signed by an officer of your firm with the authority to commit the firm. Make sure to include contact information including email for communication purposes and acknowledge your receipt of all solicitation addenda.

The proposal must be submitted in a soft-bound (no three-ring binders) format with page size of 8 ½ x 11 inches. No fold-outs other than one fold out Project schedule and one site logistics plan (not to exceed 11 x 17 inches each) may be included. The basic text information should be presented in standard business font size, and reasonable (no less than one-inch) margins.

OSU may reject any proposal not in compliance with all applicable OSU solicitation 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 throughout this procurement, OSU will not accept proposals 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.

8.0 PROPOSAL EVALUATION

The written response to this RFP is the first step in a two-step process in the selection of a Consultant for this Project. The proposals received in response to this RFP will be evaluated by the selection committee with the top scoring firms being invited to participate in on-site interviews.

Interviews will include a **THIRTY (30) minute** presentation period, immediately followed by a separate **TWENTY (20) minute** Q&A session.

After all of the interviews are completed, the members of the selection committee will discuss the strengths and weaknesses of the interviewed finalists. The members of the selection committee will then score the interviewed finalists based on all information received, presented and heard during the interviews. Final scoring will be based on finalist's response to questions during the interview stage, and through that response, how well each firm can meet the Project and University needs. The firm that has the highest overall interview score will be deemed the Apparent Successful Proposer and enter into negotiations for a contract.

Final scoring of the Interviews will be **separate and not cumulative** from the short-listing.

9.0 EVALUATION CRITERIA

The following questions constitute the evaluation criteria for the selection committee to score proposals. Respond to each criterion in numerical order. For ease in scoring, 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.

9.1 Qualifications and Experience of the Firm (40 Points)

- Describe what talents your firm brings, how its knowledge of the subject will provide benefit to the process, how the firm has been successful in the past and how that relates to this engagement. It should include information on similar services that have been provided by the firm, primary contact and other team members. Include the experience and special qualifications that are applicable to this proposal and/or are part of the specific selection criteria.
- Please disclose any associations your firm may have with organizations that provide services of the type you may participate in recommending or assessing.
- Firms must demonstrate their capabilities in providing the utmost level of experience and expertise to ensure a successful project as determined by OSU. Provide a minimum of three (3) P3 engagement samples your firm has participated in over the past five (5) years including your role and level of satisfaction with outcomes and lessons learned.
- Demonstrate your experience providing the scope of services identified herein over the past two (2) years.

- Demonstrate your experience working with institutions of higher education.

9.2 Management Plan (25 Points)

- Submit a Management Plan demonstrating how your firm will manage responsibilities, identify and mitigate risks. Describe how you will ensure quality in your service and how your firm will prioritize its commitment to OSU? An organization chart showing the roles and responsibilities of all pertinent decision-makers is a required part of the presentation.
- As part of the Management Plan include the firm's proposed deliverables schedule. Indicate critical dates and other information in sufficient detail for the selection committee to determine if the time frames are reasonable.
- The Management Plan should be concise yet contain sufficient information for evaluation by the selection committee.

9.3 Cost (15 Points)

- Provide your firm's **Fee Proposal** for the evaluation strategy procedures/policy, decision making framework, and final report deliverables on a time and materials cost reimbursement basis up to a maximum not-to-exceed amount. Please provide a breakdown of the costs including a listing of the types of personnel participating in the work, an estimate of their hours and rates charged for their services. Scoring will be based solely on the total maximum not-to-exceed amount.

NOTE: Formula for scoring Fee Points will be as follows: Lowest Fee for each of the price related items will receive full points with higher cost price related items receiving proportionally lower points according to this formula: **(Low Fee or Fee%/ Fee or Fee%) x Points Available**

9.4 Financial Stability (10 Points)

- Please provide your two most current audited financial statements, a link is preferred.

9.5 Workforce Diversity Plan (10 Points)

- 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.

10.0 INTERVIEWS AND OPTIONAL REFERENCE CHECKS (60 POINTS)

INTERVIEWS (50 POINTS)

- Interviews will be conducted to aid in determining the Apparent Successful Proposer. Information regarding the Interviews will be provided to the short-listed firms following the initial review and scoring. Final scoring of the Interviews will be **separate and not cumulative** from the short-listing.

REFERENCE CHECKS (10 POINTS)

- In addition to responding to the evaluation criteria above, provide the names, addresses and phone numbers of three (3) references. Do not include references from any firms or individuals included in your consulting team for this proposal or any OSU personnel. OSU may check with these references and with other references associated with past work of your firm.

Please provide the following information:

Point of Contact:	Person who will be able to answer any customer satisfaction questions.
Phone Number:	Phone number of the contact the University will be interviewing.
User Name:	Name of Company / Institution that retained the Consultant.
Project Name:	Name of the project.
Date Completed:	Date when the work was completed.
Address:	Street, city and state where the work took place.
Size:	Size of project in dollars.
Duration:	Duration of the project / construction in months.
Type:	Type of the project (i.e.: School, Offices, Warehouse, etc.).

OSU may check with these references or other references associated with past work of your firm.

11.0 FINANCIAL RESPONSIBILITY

OSU reserves the right to investigate and evaluate, at any time prior to award and execution of the contract, the submitting firms financial responsibility to perform the anticipated contract. Submission of a proposal will constitute approval for OSU to obtain any credit report information OSU deems necessary to conduct the evaluation. OSU will notify the firms, in writing, of any other documentation required, which may include, but need not be limited to: 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. Failure to promptly provide this information may result in rejection of the submission.

OSU may postpone the award or execution of a contract or selection of finalists in order to complete its investigation and evaluation. Failure of a firm to demonstrate financial responsibility may render it non-responsible and constitute grounds for rejection.

12.0 SUBMISSION

Submit **ONE (1)** copy of your written proposal, along with an electronic version on a thumb drive, to be received by the Due Date/Time listed in this document to:

Hanna Emerson
Construction Contract Administration
Oregon State University
644 SW 13th Street
Corvallis, OR 97333

Telephone, facsimile, or electronically transmitted submittals **WILL NOT** be accepted.

The electronic copy must be sized appropriately for transfer (under 8 mb).

Proposals received after the closing date and time **WILL NOT** be considered.

13.0 REQUEST FOR CLARIFICATION OR CHANGE

All requests for clarification and/or change regarding any information in this RFP must be addressed either in writing or email to Hanna Emerson at the address or email listed in this document no later than 5:00 PM Pacific Time on **August 7, 2019**. If you are unclear about any information contained in this document or its exhibits (Project, scope, format, agreement terms, etc.), you are urged to submit those requests for formal clarification.

14.0 UNIVERSITY SOLICITATION PROCESS OR ACTION APPEALS

Proposers may submit a written appeal of a University solicitation process or action in accordance with OSU Standard 03-015 ([*Procurement Thresholds and Methods, Procurement Solicitations and Contracts*](#)).

15.0 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 to all firms by publication on the [*OSU Business and Bid Opportunities*](#) web site. It is the responsibility of each firm to visit the website and download any addenda. No information received in any manner different than as described herein shall serve to change the RFP in any way, regardless of the source of the information.

16.0 PROPRIETARY INFORMATION

OSU will retain this RFP and one copy of each original 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 shall be open to public inspection after OSU has announced its intent to award a contract. If a proposal contains any information that is considered 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 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 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 shall accompany the proposal, 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.

17.0 PROJECT TERMINATION

OSU is seeking to award a contract to a Consultant; however, OSU reserves the right to terminate the Project or contract during any phase in the Project.

18.0 CERTIFICATION OF NONDISCRIMINATION

By submission of a proposal, the proposer certifies under penalty of perjury that the proposer has not discriminated against minority, women, emerging small business or service-disabled veteran owned business enterprises in obtaining any required subcontracts.

19.0 ENCLOSURES

OSU Sample Consultants Agreement

END OF RFP