



OSU Student Housing Public-Private Partnership Development Opportunity

Request for Proposals from Interested Parties

Response due: 3:00 PM (PST) October 29, 2014

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1. REQUEST FOR PROPOSALS

1.1. Overview of the Opportunity and RFP Process

Oregon State University (“the University” or “OSU”), on behalf of University Housing & Dining Services (“UHDS”), is soliciting proposals from interested parties to serve as partners for the planning and eventual design and construction of additional student housing at OSU’s Corvallis campus. UHDS has explored ways in which additional upper class student housing can be added to the inventory with minimal financial obligation, while ensuring that the facilities and programs align with its mission and expectations. UHDS has explored various procurement models and has determined that a public-private partnership may be in the best interests of our students, UHDS, and OSU. The University is seeking a private partner to design, build, finance and maintain housing consistent with the University’s objectives. The University desires to retain delivery of residential education and services associated with the new development.

Through this solicitation process, the University is seeking to identify private parties with appropriate qualifications, experience, financial capacity, and a proven track record of successfully executing similar projects. Following the initial stage of this RFP process, the University expects to short-list two to five 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 October 29, 2014. The University may determine in its sole discretion whether to accept any qualifications that are not received by the date and 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 \$285 million in external award funding in the 2014 fiscal year, the University's impact reaches across the State and beyond. With 12 colleges, 15 Agricultural Experiment Stations, 35 county Extension offices, 9 Forest Research Labs, 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.

Across all campuses, the University welcomes a diverse student body of approximately 30,000 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 37 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 570-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.

2.2. University Housing & Dining Services

University Housing & Dining Services provides on-campus residential and dining programs for over 4,500 students within 15 residence halls, and 107 one, two and three-bedroom apartments. UHDS also offers 3 full dining centers, 2 coffee shops and 1 market. It employs over 190 full time employees and over 1,000 students in order to deliver its mission of *providing a living-learning environment as a gateway for academic and personal success through inclusive and innovative programs and services*. Services include a comprehensive

catering operation, summer and academic year residential conference housing programs, as well as an international homestay program.

2.3. Campus Master Plan 2004-2015

The OSU Campus Master Plan (“CMP”) 2004-2015 has three purposes:

- Identify guiding principles and policies for the long-range planning of OSU that will direct the physical development (i.e., approximately three million gross square feet of new buildings and facilities) over the approximate 10- to 12-year planning horizon;
- Establish a conceptual framework for the campus through program development, land use determinations, intensity of development, and parking and circulation initiatives; and
- Clarify and enhance the relationship and connectivity with the surrounding community.

The CMP was formulated to maintain and enhance the University’s fundamental mission, its roles in undergraduate, graduate, and professional education, and its public service. The growth proposed in the CMP was necessary to accommodate the projected growth in the number of individuals seeking higher education and to support educational and research initiatives. The CMP offers flexibility in meeting the challenge of providing a compelling learning environment, while setting standards that direct future growth, guide future design decisions, and conserve and enhance the open space of the campus.

To guide development and expansion of the campus, the CMP divided the campus into nine sectors, each with its own development allocation (amount of building square footage allowed) and development standards. The campus core (Sector C) was identified as the primary area for academic and associated research-related facilities. Furthermore, the CMP established the concept of grouping student academic activities within a 10-minute walk to minimize the need for automobile travel between classes. The major campus entryways (portals) were identified at Jefferson Avenue and/or Monroe Avenue and Western Avenue and 26th Street.

The University’s current CMP expires at the end of 2015, and an OSU District Plan that will replace the current land use development regulatory agreement with the City of Corvallis is being developed for 2016 to 2025.

2.4. The OSU Development Opportunity

The University is offering potential partners a unique opportunity to work with a leading PAC-12 institution to design, build, finance, and maintain campus housing, consistent with OSU construction standards and master plan considerations with the city. 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.

The university anticipates the residential development will provide approximately 900 beds, over phases, pending supporting market demand analysis. 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.

Residence Hall Beds

Currently OSU has 900 students in triple rooms that were originally designed for double occupancy (300 students oversubscribed), and another 100 in spaces that have been converted from lounge type use to student rooms. The University's goal is to decompress the housing system by fall 2016 (for a total of 4 years of compressed operations), and current demographic projections indicate this will be an ongoing need.

To accomplish this necessary decompression OSU needs to relocate 400 upper-class students to a new on-campus residence. This will allow the University to house first year students in current housing inventory, and the upper-class students that want to live on campus without oversubscribing. This housing is expected to be suite style.

Additionally, the University has an ongoing international student recruitment agreement with INTO Partners. The joint venture, INTO OSU, estimates that there are 125 INTO Graduate Pathway students who would benefit from living on campus who currently do not due to limited capacity. Suite style arrangements work best for the INTO program, which increases OSU's total suite style beds needed to 525, in order to meet its objectives. The University's international population is a campus priority and to date the University has not been able to fully meet the demand.

In addition to the residence hall development opportunity, the University will consider the inclusion of a retail component, so long as it creates value for the University and is consistent with its objectives.

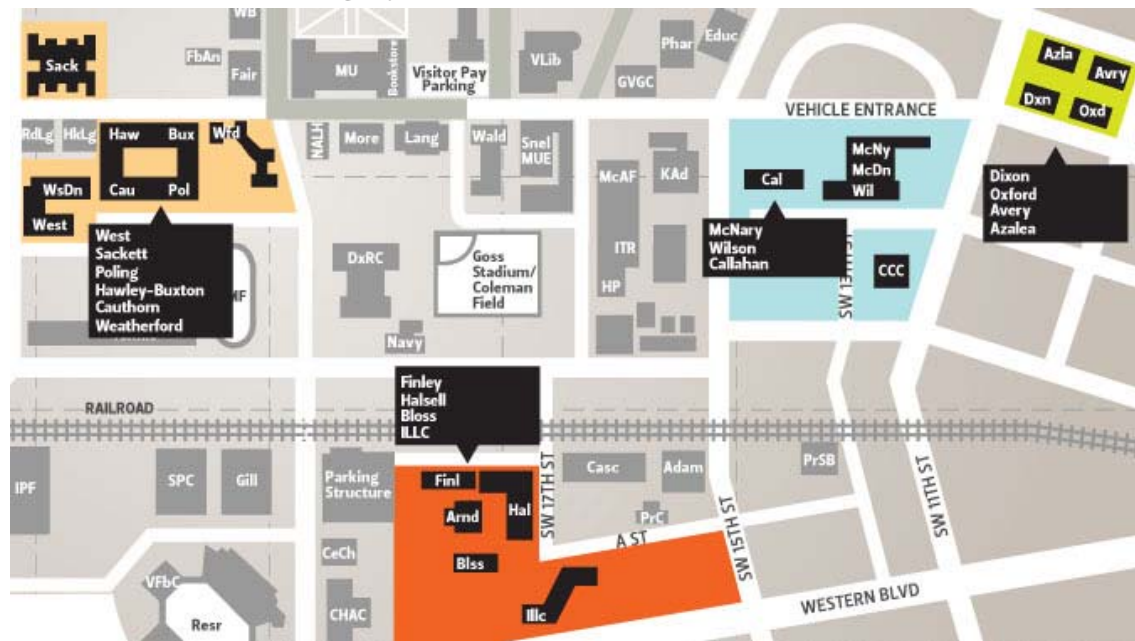
Apartments

For Apartment Housing, the University currently has an 8 month waiting list, not including those who decline to be placed on the waiting list due to its length. OSU's apartment housing program consists of 107 apartments that are a blend of 1, 2, and 3 bedroom units. Of those 107, 94 units are past their life span and have failing infrastructure, and unless replaced quickly will lead to the University not being able to house families. In 2001, 13 units were developed and remain in good condition. Below is a table that articulates both the need from the wait list, and the replacement of the 94 units that are failing. Additionally, INTO OSU estimates that 25 of their students would benefit from apartment housing; these are accounted for in the 2 bedroom waitlist number.

Apartment Type (rented by the apartment)	Current Obsolete Inventory	Current Unmet Need	Total Current Need
1 Bedroom	22	143	165
2 Bedroom	62	93	155
3 Bedroom	10	30	40

Currently the University believes there is an unmet need for 525 suite style beds, and 360 apartments.

2.5. Current Housing System



As noted previously, the Oregon State UHDS operates 15 residence halls, including an International Living-Learning Center (ILLC), and 107 apartments. Additionally, dining services offers 3 full dining centers, 2 coffee shops and a convenience market. Students also have the option of living in a public-private partnership on University land known as The Gem. The University’s current housing options are listed below:

WEST

- Buxton Hall – 200 beds
- Cauthorn Hall – 275 beds
- Hawley Hall – 215 beds
- Poling Hall – 300 beds
- Sackett Hall – 300 beds
- Weatherford Hall – 290 beds
- West Hall – 215 beds

SOUTH

- Bloss Hall - 348 beds
- Finley Hall – 350 beds
- Halsell Hall – 200 beds
- ILLC – 312 beds

EAST

- Callahan Hall – 350 beds
- McNary Hall – 350 beds
- Wilson Hall – 350 beds
- Tebeau Hall – 300 beds

**PUBLIC-PRIVATE PARTNERSHIP
ON UNIVERSITY LAND**

- The Gem – 231 apartments

For additional housing information please visit Oregon State’s University Housing & Dining Services site at <http://oregonstate.edu/uahds/>.

2.5.1. 2014-15 Housing rates

West, Bloss, Tebeau Hall Rates 2014-15	
Small Double (Bloss)	\$7,422
Double	\$8,103
Single	\$10,410

Halsell Hall Rates 2014-15	
Double	\$8,121
Small Single	\$10,113
Large Single	\$10,593

International Living-Learning Center Hall Rates 2014-15	
Triple	\$5,946
Double	\$9,132
Double with private bath	\$10,404
Single with private bath	\$11,712

Buxton, Callahan, Cauthorn, Finley, Hawley, McNary, Poling, Sackett & Wilson Hall Rates 2014-15	
Economy Triple (Poling/Cauthorn/Wilson, McNary)	\$5,055
Triple (Poling/Cauthorn/Sackett/Buxton/Hawley)	\$5,304
Quad (McNary)	\$5,469
Double	\$7,650
Small Single (Callahan/Wilson/McNary)	\$9,522
Single	\$10,083

Weatherford Residential College Rates 2014-15	
Triple	\$6,297
Quad	\$6,462
Small Double	\$8,418
Double	\$8,871
Single	\$11,304
Large Single	\$11,775

Note: Weatherford Residential College rates include a \$993/year fee for the College of Business AEP program.

2.5.2. 2014-15 Dining rates

UHDS requires all students living in University owned housing to select one of the following dining plans:

Dining Plan	2014-15 Cost Per Year
Basic	\$1,290
Preferred	\$2,028
Premium	\$2,766
Ultimate	\$3,501

2.6. OSU's Goals and Objectives

OSU desires a private partner who will assist in delivering a residential program that can benefit students at all levels. The primary objective of this partnership is to create a meaningful residential experience that can benefit upper division, graduate, and partnered students, students with families, as well as new faculty and staff members. The successful result of this partnership will include the necessary facilities to support the academic and social needs of the students served through this project. The University is not just looking to construct residence halls and apartment complexes, but rather, to develop a community in which students thrive academically, socially, and developmentally. While UHDS desires to retain delivery of residential education and services associated with the new development, the private partner will play a key role in providing the foundation of a positive student experience. For this project, overall University goals include:

- Housing across multiple locations, and in multiple phases;
- Delivery of apartments to house families as soon as practical, given the year-round demand and obsolete conditions;
- Delivery of subsequent housing as soon as practical, but no later than August 2017;
- Delivery of future phases, should they be supported by market demand analysis, as needed; and
- Educational environment consistent with the University's mission.

2.6.1. Financial

For the project outlined in this RFP, the University seeks to minimize credit impacts on the University and receive off balance sheet treatment. UHDS would bring to the partnership management support and residential programming. Specific financial goals include:

- Projects located on OSU land would consider proximity to maximize cash sales in dining centers, but ensure the project's community is separate from first year communities;
- Apartments should offer the convenience of proximity to campus, but be far enough away to be perceived as "independent;"
- Partnership terms and conditions will allow for periodic review and assessment of success indicators. Terms and conditions must allow for OSU to terminate agreement if goals and standards are not met;

- Partnership terms and conditions that do not preclude future development by OSU outside of this partnership;
- A Partnership to provide student housing on property owned by OSU;
- No impact on the University's debt capacity without clear demonstration of the value and benefits of any agreements that may impact debt capacity; and
- A Positive impact to the University's cash flow.

2.6.2. Design

OSU continues to develop facilities that have longevity, flexibility and long-term operational sustainability that support and reflect those goals outlined in the University's plan. The following are design goals for the proposed project outlined in this RFP:

- Addition of apartment style housing that meets three program types through separate projects: upper-division students, students with domestic partners without dependents, and general apartment housing (including faculty and staff). Specifically including the replacement and redevelopment of Orchard Court Family Housing;
- Quality construction meeting all OSU standards; maintains and/or positively contributes to the OSU campus character;
- The option to develop facilities at other sites should the University decide to use this partnership to do so;
- Development of additional retail, food service, and program enhancements if determined appropriate by the partnership;
- Quality construction: long-term asset;
- Diversity in unit types; and
- Contribute to the aesthetic value of the campus.

2.6.3. Community engagement

As a longtime member of the Corvallis community, the University seeks to proceed with any campus development in such a way that is positively perceived by the surrounding community. Additionally, the proposed project should also be an economic contributor to the Corvallis community adding benefits that surpass the boundaries of the University.

2.6.4. International student programs and recruitment

As previously mentioned, in 2008, OSU 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. In addition to the INTO OSU joint venture, the University attracts international students from many countries.

As student enrollment in all categories (residential, non-residential and international) continues to grow, OSU will need to expand its ability to supply on-campus housing. The University seeks to address those needs with this project.

2.7. Proposed Development Site

The current land use regulatory plan managed by the City of Corvallis for the OSU Corvallis campus divides the campus into nine development sectors. A variety of uses (including housing) and specific development square footage are currently allowed in each sector. The University's current CMP expires at the end of 2015, and an OSU District Plan that will replace the current land use development regulatory agreement with the City of Corvallis is being developed for 2016 to 2025.

Private parties should recognize that the University's planning process is still underway, which may impact the planning horizon and may drive timing for completion of negotiations or project delivery. In the event the planning process impacts the selection of the site, the University reserves the right to modify the procurement process and its schedule.

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):

EVENT	DATE
Release of this Phase 1 RFP	October 6, 2014
Deadline for questions	October 17, 2014
Phase 1 RFP responses due	October 29, 2014
Phase 1 RFP selection of two to five qualified private partners	November 25, 2014
Project agreements developed Due diligence by shortlisted parties/finalist	December 1, 2014 – January 5, 2015
Phase 2 RFP documents issued to shortlisted parties/finalists	January 8, 2015
Phase 2 RFP responses due	February 5, 2015
Finalist selected	February 26, 2015
Complete Negotiations with Finalist	May 1, 2015

Private parties should recognize that the OSU District planning process is still underway, which may impact the planning horizon and may drive the timing for completion of negotiations or project delivery. In the event the planning process impacts the selection of the site, the University reserves the right to modify the procurement process and its schedule. The University would like delivery of new housing to occur as soon as practical, but no later than Fall 2017. Some project components, such as family apartments, may be able to come online earlier than others.

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.

After the University evaluates each proposal, two to five proposers that are deemed qualified by the University based on their Phase 1 proposals will be shortlisted (“Qualified Proposers”). Once selected, Qualified Proposers will be provided with additional information concerning the proposed development in the second phase of the RFP process.

Qualified Proposers may also be asked to submit preliminary, non-binding proposals for evaluation and will have the opportunity to conduct due diligence of the Corvallis campus and housing system through:

- i. Campus tours and additional inspections by representatives of Qualified Proposers.
- ii. Management interviews, presentations, or other evaluative methods that are 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.

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.

3.2.1. Qualification requirements

This RFP is open to prospective parties who seek qualification to pursue a student housing development at OSU. Qualification will be based on a determination by the University at its discretion that the interested party meets the requirements highlighted in Section 4. 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 two to five 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.

4. 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 section dividers 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.

4.1. 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 University, its Financial 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.

4.2. 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 university housing facilities maintenance, repair, construction, and practical application of equipment and materials in facility operations;
 - c. Demonstrated understanding of facility aging behavior to assess and determine the applicability of remedial maintenance action;
 - d. All capabilities necessary to successfully maintain the project including routine maintenance, operations, and repairs; and
 - e. Demonstrate how in the past you have successfully integrated with an existing university housing department.
- B. **Capital improvements and/or capital repairs:** Teams must demonstrate their ability to efficiently undertake required capital improvements and/or capital repairs to the housing facilities during the term of the proposed lease and/or concession agreement.

4.3. Financial Capability

- A. **Financial capacity:** Teams must demonstrate their financial capacity to maintain the new facilities 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.

4.4. Relevant Experience

Provide three case studies that exemplify your firm’s value added to similar projects at universities in which Team Members have participated. Include information on your firm’s role, the size of the project and which team members from your proposed team worked on the project. Proposers should specify how these comparable projects relate to the proposed project outlined in this RFP and Team Member involvement. 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 for which you conceptualized, financed, and constructed from the ground up or developed a specific area and then managed and operated the space.

For each case study, please provide a reference that is familiar with your firm’s work throughout the project in the following format:

Institution/Company
Name
<i>Title</i>
Phone
E-mail
Dates of engagement

4.5. Approach

Realizing that the project approach will 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, and durations.

Additionally, please provide key business terms that you see as crucial to the development outlined in this RFP.

4.6. 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.



5. RESPONSE REQUIREMENTS

5.1. Quantity of Proposal

For the initial qualifications stage, submit one (1) original hard-copy and one (1) electronic copy (via CD/DVD/flash drive/e-mail) 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/e-mail) 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 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, nor will 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 other than resumes. 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 4 of this RFP.

5.2. 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 4

5.3. Submission Instructions

Copies of the qualifications stage of your submission should be delivered to the representatives below, as designated by the OSU Vice President for Finance and Administration, at the addresses shown below no later than **3:00 PM PST, on October 29, 2014.**

Submit to:	Electronic Copies to:
Mike Green <i>Associate Vice President Finance and Administration</i> Oregon State University P.O. Box 1086 Corvallis, Oregon 97339-1086 michael.green@oregonstate.edu	Public Financial Management, Inc. Tom Morsch, Managing Director morscht@pfm.com and Susan Musselman, Director sea-advisors@pfm.com

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

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

During Phase I of this RFP, 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.

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), October 10, 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 Oregon 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.

