



REQUEST FOR PROPOSALS

RFP # 2023-13

PROFESSIONAL SERVICES CONSULTANT FOR REAL ESTATE DEVELOPMENT

ISSUE DATE: Tuesday, December 5, 2023

CLOSING DATE: Friday, January 5, 2024

CLOSING TIME: 1:00 P.M., Pacific Time (PT)

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**OREGON INSTITUTE OF TECHNOLOGY
REQUEST FOR PROPOSALS**

**RFP #2023-13
PROFESSIONAL SERVICES FOR REAL ESTATE DEVELOPMENT**

SECTION I - INFORMATION REGARDING PROPOSAL

INTRODUCTION

Oregon Institute of Technology (Oregon Tech, the University) wishes to engage the services of a qualified and experienced industry professional to serve as a subject-matter expert and primary support to help guide the University's due diligence for potential entry into a long-term joint partnership, public-private partnership, or other such similar arrangement with a private sector for-profit and/or non-profit entity for the purpose of developing real estate owned by the University, a public university of the State of Oregon, at various campus locations.

The successful respondent will possess a robust knowledge of and expertise in public-private partnerships; real estate development, including mixed-use development; financial analysis; capital financing models; and municipal, state and private sector bonding. The successful respondent will also have expertise in business entity formation; relevant federal, state, and local statutes; municipal tax provisions; land use and other related regulations in Oregon; and specifically, how these apply to Oregon independent public bodies of higher education and with a governing board established under ORS 352.033.

The selected Proposer will be required to play a key role in the development of one or more realistic and optimal business models that will attract interest from reputable private sector industry participants and allow the University to engage in a partnership or other affiliation that is practical, will endure and provide long-term value for the University, and will mitigate associated risks.

IMPORTANT NOTICE

It will be the responsibility of potential proposers to refer daily to the Public University Procurement Website (<https://www2.wou.edu/nora/orpu.bid.home>) to check for any available addenda, response to clarifying questions, cancellations or other information pertaining to this Request for Proposals ("RFP").

GENERAL INFORMATION

Issuing Office: The Office of Finance and Administration of Oregon Tech is the Issuing Office and is the sole point of contact for clarifications regarding technical specifications in this RFP. The Oregon Tech Procurement and Contract Services Office is the sole point of contact regarding the RFP process. All correspondence pertaining to these two matters should be appropriately addressed to the contact persons below:

Content and Technical Specifications

Michelle Meyer, CPA, Director of Audit and Compliance
Telephone: (541) 885-1628
Email: Michelle.Meyer@oit.edu

RFP Process Questions:

Vivian Chen, J.D., Director of Procurement, Contracts, and Risk
Telephone: (503) 821-1266
Email: Vivian.Chen@oit.edu

SCHEDULE OF EVENTS

The timing and sequence of events resulting from this RFP will be ultimately determined by Oregon Tech. The following schedule is illustrative of optimal timing goals:

RFP Issue Date.....	Tuesday, December 5, 2023
Deadline for Protest of Specifications	Friday, December 8, 2023 (5:00 P.M., PT)
All Clarifying Questions Due	Friday, December 15, 2023 (5:00 P.M., PT)
Notice of Interest Deadline	Tuesday, December 19, 2023 (5:00 P.M., PT)
Closing Date (Proposals Due).....	Friday, January 5, 2023 (1:00 P.M., PT)
Finalist Presentations (if required)	Week of January 8, 2024
Deadline for Protest of Award	Seven (7) calendar days after date on Notice of Award letter
Anticipated Contract Begin Date	On or around February 1, 2024

GENERAL PROVISIONS

Oregon Tech reserves the right to reject any and all proposals received as a result of this RFP. Oregon Tech Policy Chapter 580-61 and 580-62 govern the procurement process for Oregon Tech.

1. Modification or Withdrawal of Proposal. Any proposal may be modified or withdrawn at any time prior to the closing deadline, provided that a written request is received by the Procurement and Contract Services Office, prior to the Closing Date. The withdrawal of a proposal will not prejudice the right of a Proposer to submit a new proposal.

2. Notice of Interest. The Notice of Interest (form attached below) should be submitted to the Procurement and Contract Services Office by 5:00 P.M., PT, on the date indicated in the Schedule of Events, via email. In the Notice of Interest, the Proposer must provide the name of the primary contact person, plus that person's current telephone number and email address for communication of information about the RFP. Proposers that complete and return the Notice of Interest will receive the same supplementary information. Submission of the Notice of Interest is not a mandatory requirement for Proposers to submit a proposal.

3. Requests for Clarification and Requests for Change: Proposers may submit questions regarding the specifications of the RFP. Questions must be received in writing on or before 5:00 P.M., PT, on the date indicated in the Schedule of Events, at the Procurement and Contract Services email address as listed in the Contact Information section of the RFP. Requests for changes must include the reason for the change and any proposed changes to the requirements.

The purpose of this requirement is to permit Oregon Tech to correct, prior to the opening of proposals, RFP terms or technical requirements that may be unlawful, improvident or which unjustifiably restrict competition.

Oregon Tech will consider all requested changes and, if appropriate, amend the RFP. Oregon Tech will provide reasonable notice of its decision to all Proposers that submit a Notice of Interest and on the Public University Procurement Website (<https://www2.wou.edu/nora/orpu.bid.home>).

No oral or written instructions or information concerning this RFP from Oregon Tech managers, employees or agents to prospective Proposers shall bind Oregon Tech unless included in an Addendum to the RFP.

4. Protests of the RFP/Specifications: Protests must be in accordance with Oregon Tech Policy Section 580-061-0145. Protests of Specifications must be received in writing on or before 5:00 P.M., PT, on the date indicated in the Schedule of Events, or within seven (7) business days of issuance of any addendum, at the Procurement and Contract Services email address as listed in the Contact Information section of the RFP. Protests may not be faxed. Protests of the RFP specifications must include the reason for the protest and any proposed changes to the requirements.

5. Addenda: If any part of this RFP is amended, addendum will be provided on the Public University Procurement Website (<https://www2.wou.edu/nora/orpu.bid.home>), with a copy to all parties who submit the Notice of Interest.

6. Post-Selection Review and Protest of Award: Oregon Tech will name the apparent successful Proposer in a "Notice of Intent to Award" letter. Identification of the apparent successful Proposer is procedural only and creates no right in the named Proposer to award of the contract. Competing Proposers will be notified in writing of the selection of the apparent successful Proposer(s) and shall be given seven (7) calendar days from the date on the "Notice of Intent to Award" letter to review the file and evaluation report at the Procurement and Contract Services Office and file a written protest of award, pursuant to Oregon Tech Policy Section 580-061-0145. Any award protest must be in writing and must be delivered by email to the address for the Procurement and Contract Services Office as listed in the Contact Information section of the RFP.

Oregon Tech will consider any protests received and:

- (A) reject all protests and proceed with final evaluation of, and any allowed contract language negotiation with, the apparent successful Proposer and, pending the satisfactory outcome of this final evaluation and negotiation, enter into a contract with the named Proposer; OR
- (B) sustain a meritorious protest(s) and reject the apparent successful Proposer as nonresponsive, if such Proposer is unable to demonstrate that its proposal complied with all material requirements of the solicitation and Oregon public procurement law; thereafter, Oregon Tech may name a new apparent successful Proposer; OR
- (C) reject all proposals and cancel the procurement.

The Oregon Tech Vice President for Finance and Administration or designee will timely respond to the protest after receipt. This decision shall be final.

7. Acceptance of Contractual Requirements: Failure of the selected Proposer to execute a contract and deliver required insurance certificates within ten (10) calendar days after notification of an award may

result in cancellation of the award. This time period may be extended at the sole discretion of Oregon Tech.

8. Public Records: proposals are deemed confidential until the “Notice of Intent to Award” letter is issued. This RFP and one copy of each proposal received in response to it, together with copies of all documents pertaining to the award of a contract, will be kept and made a part of a file or record which will be open to public inspection. If a proposal contains any information that is considered a **TRADE SECRET UNDER ORS 192.501(2), SUCH INFORMATION MUST BE LISTED ON A SEPARATE SHEET CAPABLE OF SEPARATION FROM THE REMAINING PROPOSAL AND MUST BE CLEARLY MARKED WITH THE FOLLOWING LEGEND:**

“This information 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.” ORS 192.500(1). Therefore, non-disclosure of documents or any portion of a document submitted as part of a proposal may depend upon official or judicial determinations made pursuant to the Public Records Law.

9. Investigation of References: Oregon Tech reserves the right to investigate all references in addition to those supplied references and investigate past performance of any Proposer with respect to its successful performance of similar services, its compliance with specifications and contractual obligations, its completion or delivery of a project on schedule, its lawful payment of subcontractors and workers and any other factor relevant to this RFP. Oregon Tech may postpone the award or the execution of the contract after the announcement of the apparent successful Proposer in order to complete its investigation.

10. RFP Proposal Preparation Costs and Other Costs: Proposer costs of developing the proposal, cost of attendance at an interview (if requested by Oregon Tech) or any other costs are entirely the responsibility of the Proposer, and will not be reimbursed in any manner by Oregon Tech.

11. Clarification and Clarity: Oregon Tech reserves the right to seek clarification of each proposal, or to make an award without further discussion of proposals received. Therefore, it is important that each proposal be submitted initially in the most complete, clear and favorable manner possible.

12. Right to Reject Proposals: Oregon Tech reserves the right to reject any or all proposals, if such rejection would be in the public interest, as determined by Oregon Tech.

13. Cancellation: Oregon Tech reserves the right to cancel or postpone this RFP at any time or to award no contract.

14. Proposal Terms: All proposals, including any price quotations, will be valid and firm through a period of sixty (60) calendar days following the Closing Date. Oregon Tech may require an extension of this firm offer period. Proposers will be required to agree to the longer time frame in order to be further considered in the procurement process.

15. Oral Presentations: At Oregon Tech’s sole option, Proposers may be required to give an oral presentation of their proposal to Oregon Tech, a process which would provide an opportunity for the Proposer to clarify or elaborate on the proposal, but will in no material way change Proposer’s original proposal. If the evaluating committee requests presentations, the Issuing Office will schedule the time

and location for said presentation. Any costs of participating in such presentations will be borne solely by Proposer and will not be reimbursed by Oregon Tech. **Note:** Oral presentations are at the discretion of the evaluating committee and may not be conducted; therefore, **written proposals should be complete.**

16. Usage: It is the intention of Oregon Tech to utilize the services of the successful Proposer(s) to provide services as outlined in the below Scope of Work.

17. Sample Contract: Submission of a proposal in response to this RFP indicates Proposer's willingness to enter a contract containing substantially the same terms listed in Exhibit A – Oregon Tech Sample Contract, attached hereto and made a part hereof ("Sample Contract"). No action or response to the Sample Contract is required under this RFP. Any objections to the Sample Contract terms should be raised in accordance with Paragraphs 3 and 4 of the "General Provisions" of this RFP, pertaining to requests for clarification or change or protest of the RFP/specifications, and as otherwise provided for in this RFP.

18. Review for Responsiveness: Upon receipt of all proposals, the Issuing Office or designee will determine the responsiveness of all proposals before submitting them to the evaluation committee. If a proposal is incomplete or non-responsive in significant part or in whole, it will be rejected and will not be submitted to the evaluation committee. Oregon Tech reserves the right to determine if an inadvertent error is solely clerical or is a minor informality which may be waived, and then to determine if an error is grounds for disqualifying a proposal. The Proposer's contact person identified on the proposal will be notified, identifying the reason(s) the proposal is non-responsive.

19. Rejections and Withdrawals. Oregon Tech reserves the right to reject any or all proposals or to withdraw any item from the award.

20. RFP Incorporated into Contract. This RFP will become part of the Contract between Oregon Tech and the selected contractor(s). The contractor(s) will be bound to perform according to the terms of this RFP, their proposal(s), and the terms of Exhibit A.

21. Communication Blackout Period. Except as called for in this RFP, Proposers may not communicate with members of the Evaluation Committee about the RFP until the apparent successful Proposer is selected, and all protests, if any, have been resolved.

22. Prohibition on Commissions. Oregon Tech will contract directly with persons/entities capable of performing the requirements of this RFP. Contractors must be represented directly. Participation by brokers or commissioned agents will not be allowed during the proposal process.

23. Ownership of Proposals. All proposals in response to this RFP are the sole property of Oregon Tech, and subject to the provisions of Oregon Revised Statutes, Chapter 192 (Oregon Public Records Law).

24. Clerical Errors in Awards. Oregon Tech reserves the right to correct inaccurate awards resulting from its clerical errors.

25. Rejection of Qualified Proposals. Proposals may be rejected in whole or in part if they attempt to limit or modify any of the terms, conditions or specifications of the RFP or the Oregon Tech Sample Contract.

26. Collusion. By responding, the Proposer states that the proposal is not made in connection with any competing Proposer submitting a separate response to the RFP and is in all aspects fair and without collusion or fraud. Proposer also certifies that no officer, agent, or employee of Oregon Tech has a

pecuniary interest in this proposal.

27. Evaluation Committee: Proposals will be evaluated by a committee consisting of representatives from Oregon Tech. Oregon Tech reserves the right to modify the Evaluation Committee make-up in its sole discretion. The committee's recommendations will be forwarded to the Vice President for Finance and Administration, or designee, for final approval.

28. Commencement of Work: The Proposer shall commence no work until all insurance requirements have been met, the Protest of Awards deadline has been passed, any protest have been decided, a contract has been fully executed, and a Notice to Proceed has been issued by Oregon Tech.

29. Use of Brand or Trade Names: Any brand or trade names used by Oregon Tech in the specifications are for the purpose of describing and establishing the standard of quality, performance, and characteristics desired, and are not intended to limit or restrict competition. Proposers may submit proposals for substantially equivalent products to those designated unless this RFP provides that a specific brand is necessary because of compatibility or other requirements. All such brand substitutions shall be subject to approval by Oregon Tech.

30. Best and Final Offer: Oregon Tech may request best and final offers from those Proposers determined by Oregon Tech to be reasonably viable for contract award. However, Oregon Tech reserves the right to award a contract on the basis of initial proposal received. Therefore, each proposal should contain the Proposer's best terms from a price and technical standpoint. Following evaluation of the best and final offers, Oregon Tech may select for final contract negotiations/execution the offers that are most advantageous to Oregon Tech, considering cost and the evaluation criteria in this RFP.

TERM OF CONTRACT

The Contract is expected to begin on or about February 1, 2024, and extend to July 31, 2024, with an option for semi-annual renewals thereafter, subject to the Contractor's continued successful performance as determined by Oregon Tech. Oregon Tech intends to reserve the right upon thirty (30) days' notice to the Contractor to terminate the Contract for its convenience.

DELIVERY OF PROPOSALS

The complete proposal (including all attachments) must be emailed and must be electronically received by ***1:00 P.M. PT, January 5, 2024***. **Email subject line must be "Response to RFP#2023-13."** Proposer are encouraged to telephone and confirm electronic receipt of the complete emailed document(s) with the Procurement and Contract Services Office before the above time and date deadline. Proposals delayed or lost by email system filtering or failures may be considered at Oregon Tech' sole discretion.

It is the responsibility of the Proposer to ensure that proposals arrive by the closing date and time. **NO LATE PROPOSALS WILL BE ACCEPTED.** Proposals may not be submitted by telephone or fax. Proposals must be e-mailed to:

Email: Purchasing@oit.edu

Proposals will be publicly opened by a designee in the Procurement and Contract Services Office on the Closing Date.

PROJECT BACKGROUND

Oregon Institute of Technology (Oregon Tech) is a public university based in Klamath Falls and the Portland metropolitan area, with a presence throughout the Pacific Northwest. We're also Oregon's only polytechnic university, meaning we emphasize technical subjects and applied sciences, and encourage students to pursue their passions and professional opportunities through internships, externships, and field experiences.

Founded in 1947 as an institution to train and re-educate World War II veterans, Oregon Tech has grown immensely in size, scope, and service. Today, we're accredited by the Northwest Commission on Colleges and Universities, and our student population totals nearly 5,000, making student-to-faculty ratio 16:1.

Officially recognized as Oregon's Polytechnic University, we specialize in engineering, technology, healthcare, business, communication, and applied sciences such as psychology and environmental sciences. Our faculty and industry partners work hard to ensure students have the resources and training to tackle the challenges of both today and tomorrow.

Oregon Tech's real-world focus produces results, too: 96 percent of our students are either employed or enrolled in graduate school within six months of graduation, with average starting salaries of \$60,000 per year.

Hands-on Education

Our individualized and applied approach to teaching, which blends theory and practice, is the main reason our graduates are so avidly recruited. Whether they study software engineering, vascular technology, management, or dental hygiene, Oregon Tech students have amazing opportunities to apply what they learn in lab-based classes, clinics, externships and workplaces. This practical focus is reinforced in the classroom by instructors who come to Oregon Tech with relevant business, industrial, or clinical experience.

Campus Locations

In Oregon, our traditional, residential campus is in Klamath Falls; our Portland-Metro campus in Wilsonville; and a dental hygiene partnership with Chemeketa Community College in Salem. In Washington, the University offers degrees to employees of Boeing. Degrees can also be earned from anywhere through Oregon Tech Online.

The main, residential campus is located in Klamath Falls in beautiful Southern Oregon. Klamath Falls, a city of about 20,000 residents (45,000 in urban growth area), is located in south-central Oregon, about 20 miles from the California border. Known as Oregon's "City of Sunshine," Klamath Falls enjoys about 300 days of blue skies each year.

Our campus in Klamath Falls is nestled on the eastern slope of the Cascade Mountains. The 190-acre campus offers spectacular views of Upper Klamath Lake, pine-studded knolls and snow-capped peaks from nearly every building. It takes about five hours to drive to Klamath Falls from Portland, about three hours to drive from Eugene, about five hours from Reno, Nev., and just under three hours from Redding, Calif.

Oregon Tech's Portland-Metro campus is located 15 miles south of downtown Portland, in the community of Wilsonville. In the heart of the Silicon Forest, the Portland-Metro Campus is designed to provide an industry-focused educational experience to students. It takes about 3 hours to drive to Portland from Seattle, WA.

Oregon Tech Online lets students finish their certificate, associate, bachelor, or master's degree without leaving their home or office and without the hassles of travel, childcare or giving up their current job.

Partnership is an Oregon Tech core value. We appreciate the opportunity to work with other educational institutions and the business community in preparing our graduates to lead, achieve and succeed in the real world.

The bachelor degree program in Salem is a partnership between Oregon Tech and Chemeketa Community College. The classrooms and dental hygiene clinic are in Chemeketa's state of the art Health & Science Building. Dental hygiene classes are taught on the Chemeketa campus with an occasional mix of online learning. Students learn and practice dental hygiene skills in the campus-based clinic where they see patients.

Oregon Tech also offers programs in partnership with Boeing in Seattle. Classes are offered on site in the Puget Sound area. Classes requiring laboratory facilities may be held at local area community colleges with Oregon Tech instructors.

Campus Maps

Klamath Falls Campus Map can be found at the following website: <https://www.oit.edu/about/campus-map/klamath-falls>

Portland-Metro Campus Map can be found at the following website: <https://www.oit.edu/about/campus-map/portland-metro>

SCOPE OF WORK

Oregon Tech wishes to engage the services of a qualified and experienced industry professional to serve as a subject-matter expert and primary support to help guide the University's due diligence for potential entry into a long-term joint partnership, public-private partnership, or other such similar arrangement with a private sector for-profit and/or non-profit entity for the purpose of developing real estate owned by the University, a public university of the State of Oregon. The development's focus is the possible construction of a mixed-use facility that is anticipated would be four (4) to six (6) stories tall, encompassing between 80,000 and 100,000 gross square feet. The facility would be located immediately adjacent to the University's campus located in Wilsonville, Oregon and possibly feature a mix of apartment-style housing, University educational laboratory and innovation space, community meeting space and limited retail and food service business space.

The successful respondent will possess a robust knowledge of and expertise in public-private partnerships; real estate development, including mixed-use development; financial analysis; capital financing models; and municipal, state and private sector bonding. The successful respondent will also have expertise in business entity formation; relevant federal, state, and local statutes; municipal tax provisions; land use and other related regulations in Oregon; and specifically, how these apply to Oregon independent public bodies of higher education and with a governing board established under ORS 352.033.

The selected Proposer will be required to play a key role in the development of one or more realistic and optimal business models that will attract interest from reputable private sector industry participants and allow the University to engage in a partnership or other affiliation that is practical, will endure and provide long-term value for the University, and will mitigate associated risks.

Due to the importance of familiarity with the University's operations and key personnel, the selected proposer must meet regularly with Oregon Tech's internal project team comprised of executive leadership and other University staff members. The selected Proposer will also prepare and present periodic progress reports to University senior leadership and the University's Board of Trustees, either in-person or virtually.

The selected Proposer's role in the project is expected to last six (6) months, with an estimated end date of July 31, 2024. The University may extend the selected Proposer's role in the project for additional periods of (6) months each, up to a maximum of five (5) additional periods for a maximum total of 30 additional months.

Additionally, the University, at its discretion, may wish to engage in similar services for other campus locations as other potential projects may be identified over the course of the project.

Proposers may be required to appear before Oregon Tech's evaluation committee, either in-person or virtually, to discuss and explain their proposal and to respond to questions from the Committee. The Committee reserves the right to request additional information from proposers.

Objectives and Services:

The selected Proposer shall meet the following objectives and perform the following services:

1. **Due Diligence.** In coordination with Oregon Tech's internal project team and other key staff, the selected Proposer shall guide the University's due diligence efforts for potential entry into a long-term joint partnership, public-private partnership, or other such similar arrangement with respect

to University-owned property for possible construction of a mixed-use facility. As part of guiding due diligence efforts, the selected Proposer will identify risks along with risk mitigation strategies that may be associated with various business entity structures, business models and/or other items deemed critical to ensure a realistic, viable outcome providing long-term value to the University and its stakeholders, and meeting the needs of residential students. The selected Proposer's due diligence services will include, but will not be limited to, providing market analyses, financial feasibility analyses, highest and best use analyses, economic impact analyses, public policy analyses, project operational assessment, and other project-based real estate development and financial advisory services.

2. **Optimal Business Model Development.** In coordination with Oregon Tech's internal project team and other key staff, the selected Proposer shall guide the University's development of one or more realistic and optimal business models rooted in the results of due diligence that will attract interest from reputable private sector industry participants and will allow the University to make well-informed decisions should it engage in a partnership or other affiliation. Development of optimal business models will include risk identification and related risk mitigation strategies. The selected Proposer's role in guiding the development of optimal business models, based on the Proposer's subject-matter expertise and due diligence, is a core component of the Proposer's role as primary support for the University under this professional services engagement.
3. **Communication.** The selected Proposer must periodically meet with University senior leadership and Oregon Tech's Board of Trustees to provide regular updates on due diligence efforts and optimal business model development. Regular updates must include identification of risks, risk mitigation strategies, and transfer of knowledge to support informed decision making. In addition, the selected Proposer may also be requested to conduct or assist in the University's stakeholder and community presentations and engagement efforts; assist with interactions with local government agencies and officials; and assist with public messaging and public relations.

SECTION II – INFORMATION REQUIRED FROM PROPOSERS

PROPOSAL FORM AND CONTENT

Proposals that do not contain all the information requested in this and other sections may be rejected as non-responsive.

Submission Format

1. The proposal should be written on standard size (8½” x 11”) paper, using generally accessible word processing and document formats conducive to cut-and-paste transfer of information to contracts or other summary documents. MSOffice Suite and Adobe Acrobat documents are preferred.
2. Proposers should structure responses as outlined in this RFP. Proposals should be prepared so that responses are specifically addressed in the same order as the requested information identified below and on the Questionnaire. Pages should be numbered consecutively.

File Size Limit

Proposer’s submission may not exceed **25 MB** in file size. This limit cannot be increased, and files of larger size will not be accepted.

REQUIRED PROPOSAL CONTENT

1. You must complete the **Bidder/Proposer Non-Discrimination and Oregon Tax Laws Certification** sheet, signed by an authorized company official.
2. The proposal must also include the following:
 - a. **Title Page or Cover Letter.** The title page or cover letter should indicate the date, subject, name of the Proposer, address, current telephone number, e-mail address, name and title of the Proposer’s contact person as well as a signature of an authorized official with the authority to negotiate and contractually bind the Proposer.
 - b. **Questionnaire.** Complete and specific answers to the Questionnaire for Proposers. Please respond by restating each question and thereafter providing your answer in order beginning with question 1.
3. **Summary Statement.** The Proposer may, but is not required to, provide a summary statement as to its qualifications, as well as briefly describe (no more than five hundred (500) words) any special considerations Oregon Tech should consider.

EVALUATION CRITERIA

Proposals will be evaluated for completeness and compliance with this RFP. Proposals considered complete will be evaluated to determine if they comply with the administrative, contractual, and technical requirements of the RFP. If the proposal is unclear, Proposers may be asked to provide written clarification. **Proposals that do not specifically address the scope of work or do not include the complete proposal content may be rejected.**

Proposals will be evaluated based on the following criteria and questions outlined in the Questionnaire for Proposers:

1. Background Information	20 points
2. Scope of Work	25 points
3. Cost Summary	25 points
4. Quality of Proposal	15 points
5. References Review	15 points
6. Interview (if applicable)	<u>25 points</u>

Total Possible:	<u>125 points</u>
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SECTION III – QUESTIONNAIRE FOR PROPOSERS

Please submit your responses in order beginning with question 1 by restating the question, then providing your answer. Use additional sheets as necessary. Be specific with names and numbers.

The following list specifies the items to be addressed in your proposal. Please read it carefully and address it completely and in the order listed to facilitate the University's review of your proposal. Proposals shall be organized into the sections identified below. The content of each section is detailed in the following pages.

- Proposer's General Qualifications
- Executive Summary and Proposal Overview
- Proposer Qualifications
- Services Defined
- Experience and References
- Managing the Relationship with Oregon Tech
- Financial Proposal

1. Proposer's General Qualifications:

- A. Cover letter describing the organizational structure and history of the Proposer, including parent corporations (if applicable), and a statement that summarizes any deviations or exceptions to the RFP requirements and includes a detailed justification for the deviation or exception. (Significant deviations may result in disqualification of the Proposer.)
- B. Description of experience providing industry professional services and subject-matter expertise, including any previous engagements with universities, other governmental organizations, and/or entities of a similar size and complexity to Oregon Tech. Provide evidence of similar and/or developer professional services performed within the last three years, including the following information:
 - i. Client name
 - ii. Primary contact person, including title, email address, and phone number
 - iii. Professional services objectives and/or deliverables
 - iv. Professional services start and end dates
 - v. Qualifications of professional services personnel
 - vi. Approximate number of hours expended
 - vii. Any additional information, which will help Oregon Tech understand the scope and complexity of the engagement and how it is similar to Oregon Tech's proposed project

2. Executive Summary and Proposal Overview

- A. The Executive Summary and Proposal Overview shall condense and highlight the contents of the technical proposal in such a way as to provide the evaluation committee with a broad understanding of the entire Proposal.

3. Proposer Qualifications

- A. The purpose of the Proposer Qualifications section is to determine the ability of the Proposer to respond to this Request for Proposal. Proposers must describe and offer evidence of their ability to meet each of the qualifications listed below.
- i. **Staffing**
Identify and provide qualifications of individuals within the Proposer to be assigned direct responsibility for the engagement. This should include experience with similar engagements, including governmental and higher education clients, if any.
 - ii. **Experience and Expertise**
 - a. Identify and list experience with:
 - i. Relevant federal, state, and local statutes, municipal tax provisions, land use and other related regulations in Oregon, and specifically how these apply to Oregon independent public bodies of higher education.
 - ii. Land development of similar project goals of mixed-use construction.
 - iii. Serving as subject-matter expert and primary support guiding development of optimal business models with specific consideration given to inherent constraints and limitations within the client's operating environment.
 - iv. Communicating with senior leadership and boards, including transfer of knowledge for informed decision making.
 - iii. **Quality Control**
Provide information regarding Proposer quality control standards with respect to development of optimal business models for public-private partnerships or similar ventures.

4. Services Defined

- A. **Services Defined**
Using the Scope of Work as a guide, outline a work plan, with target dates for beginning and completion of essential steps necessary to meet the deadlines.
- B. **Professional Services Approach**
Provide a brief overview of the Proposer's professional services philosophy and approach to the engagement for the following:
- i. How the partner-in-charge/project executive/project manager will take an active role in professional services efforts to achieve timely completion.
 - ii. The Proposer's approach in guiding due diligence efforts as well as development of optimal business models that include risk identification and related risk mitigation strategies.
 - iii. Communication with University senior leadership and Board of Trustees, engagement with University and community stakeholders, interaction with local government agencies and officials, and public messaging and public relations.
- C. **Optimal Business Model Development**
- i. Outline steps the Proposer would undertake as part of developing one or more realistic and optimal business models rooted in the results of the Proposer's due diligence that will attract interest from reputable private sector industry participants.
 - ii. Describe how steps taken as part of optimal business model development will allow the University to make well-informed decisions should it engage in a partnership or

- other affiliation. As part of the description of overall business model development, provide a brief overview of steps that would be taken as part of the Proposer's risk identification process and development of related risk mitigation strategies.
- iii. Additionally, describe the Proposer's role in guiding and leading University staff as part of the Proposer's development of optimal business models, a core component of the Proposer's role as the primary support for the University under this professional services engagement. Please describe the level of effort and participation the Proposer anticipates will be needed from University staff as part of the Proposer's development of optimal business models.

5. Experience and References

A. Professional Services Experience

Indicate the Proposer's experience with:

- i. Providing similar services for similar organizations, including governmental entities and higher education organizations.
- ii. List entities, including colleges and universities (if any), for which your firm has performed similar services within the past three (3) years.

B. Indicate the Proposer's expertise in:

- i. Capital financing models.
- ii. Municipal, state and private sector bonding.
- iii. Risk identification and mitigation strategies regarding development of client-owned real estate for possible construction of a mixed-use facility.

C. References

- i. The Proposer shall supply the names, addresses, and telephone numbers of three (3) business references for whom similar work has been performed and briefly describe the type of service provided within the last three (3) years. By submission of a proposal, the Proposer grants permission to the University to contact the references.

6. Managing the Relationship with Oregon Tech

A. Describe the Proposer's process for working with Oregon Tech:

- i. Availability and capacity to deliver key individuals with the knowledge and skills necessary for this work.
- ii. Process for scheduling Proposer resources to deliver services.
- iii. Supervision of Proposer resources.
- iv. Guiding due diligence efforts and developing optimal business models.
- v. Understanding entity-focused, industry-focused, and project-focused comprehensive risk identification and mitigation strategies.
- vi. Communicating with senior leadership and boards while guiding due diligence and business model development efforts, including transfer of knowledge to key stakeholders for informed decision making.

7. Financial Proposal

A. Exhibit B

- a. Using Exhibit B, a total estimated cost for the Proposer's services with itemized hours and costs to provide professional services. Proposers should also identify the number of resources needed and the associated costs. Oregon Tech acknowledges that the successful proposer may need to perform an assessment on various areas to

determine extent of due diligence and optimal business model development efforts and as a result, total estimated cost may evolve over the duration of the project.

B. Hourly Rate

- a. An hourly rate for each staff member assigned to providing the service and an estimated number of hours for each staff person to complete the service.

C. Other Expenses

- a. A list of expenses that will be billed to Oregon Tech other than the hourly fee and travel reimbursements.

D. Price Quotes

- a. Prices quoted shall include all costs for services provided under this contract pertaining to these services. Any unspecified costs shall be borne by the Contractor.

SECTION IV – CONTRACT TERMS AND REQUIRED DOCUMENTS

NOTICE OF INTEREST

**RFP #2023-13
PROFESSIONAL SERVICES CONSULTANT FOR REAL ESTATE DEVELOPMENT**

Name of Consultant/Firm: _____

Check One:

_____ Yes, this firm will submit a proposal in response to this RFP. Please forward any addenda to the RFP to my attention.

_____ No, this firm does not anticipate submitting a proposal in response to this request.

Comments:

Signature: _____ Date: _____

Name: _____ Title: _____

Address: _____

City/State/Zip: _____ Phone: () _____

E-mail: _____

Please email this Notice of Interest no later than December 19, 2023 at 5:00 P.M. PT to Purchasing@oit.edu.

**BIDDER/PROPOSER
NON-DISCRIMINATION AND OREGON TAX LAWS CERTIFICATION**

**RFP #2023-13
PROFESSIONAL SERVICES CONSULTANT FOR REAL ESTATE DEVELOPMENT**

I, the undersigned, have read all of the terms and conditions of this Request for Proposals, and I understand that if awarded the contract, I and the firm represented herein shall be bound by its terms and conditions and representations made in this response. I certify that the named firm has not discriminated against minority, women, or emerging small business enterprises in obtaining any required subcontracts.

Certified Minority, Women, or Emerging Small Business

For statistical purposes only, please indicate if your firm is an Oregon certified minority, women, or emerging small business (check all applicable): ☐ DBE ☐ MBE ☐ WBE ☐ ESB

Certificate of Compliance with Oregon Tax Laws

I, the undersigned, (check one):

- ☐ hereby certify under penalty of perjury that I am not in violation of any Oregon Tax Laws.
- ☐ hereby certify under penalty of perjury that I am authorized to act on behalf of the firm herein named and to the best of my knowledge, such firm is not in violation of any Oregon Tax Laws.

For purposes of this certification, "Oregon Tax Laws" means a state tax imposed by Oregon Revised Statutes (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 Oregon Department of Revenue under ORS 305.620.

Business Designation (check one): ☐ Corporation ☐ Partnership ☐ Sole Proprietorship
☐ Governmental/Non-Profit ☐ Limited Partnership ☐ Limited Liability Partnership
☐ Limited Liability Company

Signature: _____ Date: _____

Print Name: _____ Title: _____

Firm Name: _____

Address: _____

City/State/Zip: _____ Phone: () _____

E-mail: _____

EXHIBIT A

OREGON TECH SAMPLE CONTRACT

[Please see attached.]

EXHIBIT B

FINANCIAL PROPOSAL TEMPLATE

[Please see attached.]