

SOUTHERN OREGON UNIVERSITY

Request for Qualification/Proposals ("RFQ")

SENIOR HOUSING PROVIDERS



RFQ No.2025-15

Proposals Due:	No later than 2 p.m. PST, April 18, 2025 Late proposals will not be accepted or considered.
Submit Proposals to:	Physical address: Southern Oregon University Office of the General Counsel 1250 Siskiyou Boulevard Ashland, OR 97520 U.S. Mail address: Southern Oregon University Office of the General Counsel 1250 Siskiyou Boulevard Ashland, OR 97520
Direct Questions to:	Procurement Contact: Office of the General Counsel Email: generalcounsel@sou.edu Phone: 541-552-8055 Deadline for questions/solicitation protests: March 10, 2025 3:00 PM

Table of Contents

<i>This RFQ is available electronically through Bonfire and Oregon Public Universities Business and Bid Opportunities.....</i>	3
1. Introduction	4
1.1 About SOU.....	5
1.2 About Ashland.....	6
1.3 Selection & Negotiation.....	7
1.4 Timeline/Deadlines	7
1.5 RFQ Clarifications and Protests; Addenda	7
2. Proposal Format, Content, and Submission	9
2.1 Proposal Format	9
2.2 Attachment B: Proposer Certifications and Representations.....	9
2.3 Proposal Content.....	9
2.4 Proposal Responses to Evaluation Criteria	10
2.5 Proposal Submission.....	12
2.6 Confidential Information	13
3. Proposal Evaluation and Award	14
3.1 Clarification of Responses.....	14
3.2 Site Visits/Informational Activities	14
3.3 Proposal Evaluation.....	14
3.4 Notification of Intent to Enter into Negotiations.....	15
3.5 Negotiation	15
3.6 Award of Contract	16
4. Solicitation Terms and Conditions; Protest of Award.....	16
4.1 Proposer Cost of Response Preparation	16
4.2 Submitted Materials are University Property.....	16
4.3 Protests.....	16
5. Attachment A: Description of Site	18
6. Attachment B: Proposer’s Certifications and Representations.....	33
7. Attachment C: Specifications.....	35
8. Attachment D: Project Development Plan	41

Welcome:

Thank you for your interest in this RFQ. Our aim is to find the right long-term partner to work with Southern Oregon University (“SOU”) on a Public-Private Partnership for student retirees. SOU and Ashland, Oregon look forward to the creativity the RFQ proposers will bring to this partnership search. To get a feel for SOU and Ashland, please see this September 14, 2024, Forbes Magazine article titled [25 Best Places to Enjoy Your Retirement](#) that said this about Ashland, Oregon:

“Some 285 miles south of Portland, this verdant outpost offers galleries, a robust restaurant scene and the acclaimed six-month-a-year Oregon Shakespeare Festival, all set amid scenic mountains and forests. Southern Oregon University hosts a lifelong learning institute and allows free auditing of college classes. The highly walkable downtown (elevation: 1,950 feet) is set in a comfortable climate with little snow, good air quality, a low serious crime rate and a high number of doctors per capita. Nature trails are just outside town.”

SOU is certainly on the national map, and we hope you will consider submitting a proposal.

Mandatory Pre-Proposal Conference:

One pre-proposal conference will be held on February 25 from 10:00 AM - 12:00 PM, in the Meese Room, located at the SOU Hannon Library and will be simultaneously held via Zoom and recorded. Southern Oregon University (“SOU”), at its discretion, may hold subsequent pre-proposal conferences based upon feedback received from Proposers. SOU conducts such meetings to clarify information provided in the RFQ and to provide interested Proposers an opportunity to ask questions about the RFQ. The initial pre-proposal conference will include a tour of the campus and the subject property. Statements made by SOU’s representatives at the pre-proposal conference are not binding on SOU unless confirmed by written addendum. Please RSVP to the mandatory pre-proposal conference by emailing generalcounsel@sou.edu

RFQ Availability:

This RFQ is available electronically through Bonfire and Oregon Public Universities Business and Bid Opportunities.

Proposal Opening:

Proposals will be opened after 3:00 p.m. on the date proposals are due.

Proposal Documents:

Senior Housing Providers

Attachment A: Description of Site

Attachment B: Proposer Certifications and Representations

Attachment C: Specifications

Attachment D: Project Development Plan

1. Introduction

Southern Oregon University (“SOU”) is interested in expanding its on-campus housing offerings to include a program and facility designed to accommodate a growing contingent of previously underserved nontraditional students: retirees. SOU is seeking proposals from highly qualified senior housing providers to develop and operate a facility on a vacant parcel of property located on campus (the “Project”). SOU’s objectives for the Project are to increase retiree student attendance, stabilize, and generate long-term revenue for SOU from an underutilized campus property, and to further SOU’s vision, mission, and goals by diversifying the student body, supporting SOU’s commitment to lifelong learning, and making the campus a safe space for learners of all ages.

SOU believes that retirement today looks very different than it did just decades ago. As people transition from full-time careers, today’s active and engaged retirees are looking for dynamic places to live, learn, and play. Across the nation, communities and campuses are embracing a community of older people who want to be part of a college environment. A new on-campus housing facility would provide a unique living environment for a contingent of nontraditional students to be fully integrated into campus academic courses, concerts, art installations, athletic events, and SOU’s [Osher Life Learning Institute](#). The educational and enrichment opportunities for a new facility are limitless.

SOU is seeking a Public-Private partnership opportunity to develop a purpose-built facility for retiree students who want to be fully integrated into the fabric of the SOU community as life-long learners. SOU intends not only to provide a robust academic experience for residents of the facility but also to benefit from residents’ unique strengths and experience as educational resources. SOU envisions a facility that is not just for living but also has educational spaces where traditional students are engaged with and learning from older student residents. This project has the potential to create a whole new demographic of SOU students and community members, organically develop new educational initiatives, and diversify and stabilize university revenue. As a result, SOU is seeking a Public-Private partnership that is as focused on educational programming and involvement as it is on other facets of retirement living.

The Project is envisioned to be a residential living and mixed-use facility. The facility could include the establishment of common areas, dining, classrooms, medical offices, daycare, support uses (e.g., haircare, nailcare), and /or medical facilities that may or may not be required to be licensed by the State of Oregon.

The development partner would work with the University Design and Development Guidelines of the University’s Master Plan (See current [Ashland City Code 18.3.6.020](#)) or potentially be required to pursue a Conditional Use Permit through the City of Ashland. Note that the University has been working with the City of Ashland and has filed a Preliminary Application to Amend the 2010 Master Plan, which includes the Project.



1.1 About SOU

SOU is a regional public liberal arts university located in Ashland, Oregon, predominantly focused on serving southern Oregon but with a student body from around the world. With a campus of over 5,300 students and a culture of engaged faculty and staff, the SOU community emphasizes diversity and inclusion and focuses on preparing students to live and lead in a multicultural, global society. SOU students have plenty of degree-path options and can pursue their educational goals through 37 areas of study in a dynamic range of fields, and a stand-alone Honors College is open to students in all fields of study. Internships, mentor relationships, field study, capstone projects, volunteer opportunities, and civic engagement allow our students to transform learning into meaning. The supportive learning environment at SOU fosters creativity and innovation and builds a solid foundation for success. In addition to its degree programs, SOU operates the Osher Lifelong Learning Institute (“OLLI”), a member-driven educational community primarily serving adults aged 50 and above. OLLI brings together more than 1,700 adults with diverse courses, activities, and excursions designed to foster lifelong learning, encourage social interaction, and provide cultural enrichment.



1.2 About Ashland

The SOU campus is located in downtown Ashland, Oregon, a town of approximately 21,000 people located in the beautiful Rogue Valley. [*Forbes Magazine*](#) in 2024 selected Ashland as one of the 25 Best Places to Enjoy Your Retirement. *Outside Magazine* selected Ashland as a top-ten finalist for the “Best Town in America,” Ashland is a culturally rich mecca for tourism, entertainment, entrepreneurship, and breathtaking outdoor experiences. Home to the world-famous Oregon Shakespeare Festival, Ashland attracts visitors from all over the country and provides a vibrant cultural scene year-round. Ashland offers a high quality of life with its range of amenities, including excellent dining options, boutique shopping, and strong sense of community, not to mention access to lectures, workshops, and courses at SOU. The town is known for its friendly atmosphere, making it easy for newcomers to integrate and feel at home. Ashland is located 15 minutes south of Medford, Oregon, a town of 85,000 with a regional airport and excellent regional medical facilities.

1.3 Selection & Negotiation

SOU intends to utilize this RFQ/RFP process to select a preferred provider with whom to negotiate a formal agreement. If SOU and the selected provider cannot reach an agreement, SOU will terminate negotiations and enter into negotiations with the next highest-ranking Proposer. SOU is not obligated to choose a Proposer.

1.4 Timeline/Deadlines

ACTIVITY	DATE
Issuance of RFQ	January 15, 2025 5:00 PM
Mandatory Pre-proposal conference	February 25, 2025 10:00 AM – 12:00 PM
Deadline for questions/clarifications/protest of solicitation documents	March 10, 2025 3:00 PM
Proposals due	April 18, 2025 2:00 PM
Interviews	May 27 – May 30, 2025
Notice of Intent to Enter Negotiations	TBD
Deadline for filing Protest of Notice of Intent	TBD

SOU reserves the right to deviate from this schedule. Notice of any changes in the schedule will be sent in writing to all providers who attended the mandatory pre-proposal conference.

1.5 RFQ Clarifications and Protests; Addenda

(a) Informal Questions or Requests for Clarification

Any Proposer requiring clarification of the information provided in this solicitation may submit specific questions or comments in writing to the procurement contact shown on page 1 of this document. Email is the preferred form of written communication. The deadline for submitting such questions is set forth in this section.

(b) Request for Clarification or Protest of Solicitation

Any Proposer wishing to protest this RFQ or request clarification of any provision, specification, or contract term contained in the solicitation documents must submit such questions, comments, or protests to:

Office of the General Counsel
Phone: 541-552-8055
Email: generalcounsel@sou.edu

The deadline for submitting such protests is March 10, 2025.

(c) Content of Solicitation Protest/Request for Clarification

The prospective Proposer's written request for clarification or protest of the RFQ must include all of the following:

- (i) Sufficient information to identify the solicitation that is the subject of the protest;
- (ii) The grounds that demonstrate how the procurement process is contrary to law or how the solicitation document is unnecessarily restrictive, is legally flawed, or improperly specifies a brand name;
- (iii) Evidence or supporting documentation that supports the grounds on which the protest is based; and
- (iv) A statement of the desired changes to the procurement process or the solicitation document that the prospective Proposer believes will remedy the conditions upon which the prospective Proposer based its protest.

(d) Addenda

If SOU determines that a change or clarification to the solicitation documents is necessary, such information, clarification, or interpretation will be supplied in a written addendum sent to all prospective Proposers who attended the mandatory pre-proposal conference.

Those who have registered for the mandatory pre-proposal conference will be notified of addenda via email. Addenda shall have the same binding effect as though contained in this RFQ. The official in charge of the procurement shall issue all addenda not less than five days prior to the submission deadline.

Statements made by SOU's representatives are not binding on SOU unless confirmed by a written addendum.

2. Proposal Format, Content, and Submission

2.1 Proposal Format

University proposal standards:

- (a) Proposal shall include a cover that prominently identifies the proposer.
- (b) The first page of the proposal shall be a one-page cover letter.
- (c) The second page of the proposal shall be Attachment B.
- (d) Proposal shall next include a table of contents; for the PDF version, the table of contents will also be linked.
- (e) Proposal shall next address all items presented in Attachment C of this RFQ in the order presented.
- (f) Proposal shall finally address all items presented in Attachment D of this RFQ in the order presented.
- (g) Proposers may add any sections or information they wish to address up to the proposal's maximum page count.
- (h) Proposal maximum is 50 pages single sided pages or fewer in length, not including reports, resumes, maps, section title pages, and requested documents and similar attachments.
- (i) Printed Proposals shall be prepared simply and economically, and shall be comprised of recyclable and, ideally, recycled materials. Proposals shall be bound or in three-ring binders.

2.2 Attachment B: Proposer Certifications and Representations

Each proposal shall include a completed Attachment B: Proposer Certifications and Representations form, signed in ink. An electronic signature shall not be accepted in lieu of an original handwritten signature.

2.3 Proposal Content

Proposals shall include all designated mandatory requirements. Proposals lacking one or more of the mandatory requirements may be rejected as nonresponsive.

2.4 Proposal Responses to Evaluation Criteria

Each proposal shall address each of the following evaluation criteria completely, and in the order provided:

Written Evaluation Criteria	
<p><u>I. Qualifications – See Details in Attachment C</u></p> <p>Please describe your company’s experience and expertise in the area of senior-living. Describe your company’s philosophy and how it would align with SOU’s mission and objectives for the Project. Should you win this RFQ who are the people on your team who SOU would expect to work with? SOU expects the successful Proposer will have a long-term partnership with SOU and wants to avoid reputational risk.</p>	<p>Maximum Points Available: 40</p>
<p><u>II. Financial History & Capacity- See Details in Attachment C</u></p> <p>Describe your financial condition. Describe any financial challenges that your company has experienced in the last ten years and how you addressed them. Please describe your company’s likely financing model.</p>	<p>Maximum Points Available: 10</p>
<p><u>III. Project Experience- See Details in Attachment C</u></p> <p>Describe five projects of similar scope and size that your company developed that were completed on time, on budget, and to a high-quality standard. If your company has previously developed senior housing on or adjacent to a college/university campus, please include such projects among the five. Provide the project start and end dates and cost.</p>	<p>Maximum Points Available: 5</p>
<p><u>IV. References - See Details in Attachment C</u></p> <p>Submit five business references from owners, partners, developers, residents, or others.</p>	<p>Maximum Points Available: 5</p>

<p><u>Proposed Project Development Plan - See Details in Attachment D</u></p> <p>In addition to the information requested in the body of the RFQ, SOU asks each Proposer to submit a proposed high-level Project Development Plan.</p>	<p>Maximum Points Available: 40</p>
<p>Total for Written Evaluation</p>	<p>Total Points Available: 100</p>
<p>Interview Evaluation Criteria</p>	
<p><u>Key Staff and Consultants</u>. Introduce key staff and consultants who would develop and operate the Project. Each staff member should describe their experience and expertise, their development and operational objectives for the Project, and how they would work with SOU to identify and implement joint goals.</p>	<p>Maximum Points Available: 25</p>
<p><u>Design and Operational Approach to the Project</u>. Please describe the team’s approach and vision and how it would align with SOU’s mission and objectives for the Project.</p>	<p>Maximum Points Available: 50</p>
<p><u>Ongoing Communication</u>. Describe how the team will maintain communications with SOU during development and over the term of the operation. Describe how the team will resolve controversial or other potential reputational issues.</p>	<p>Maximum Points Available: 25</p>
<p>Total for Interview Evaluation</p>	<p>Total Points Available: 100</p>
<p>Site Visit Evaluation Criteria (Optional). This section only applies if SOU elects to make a site visit to a facility operated by a Proposer.</p>	
<p><u>Facility Design</u></p>	<p>Maximum Points Available: 30</p>
<p><u>Facility Integration into the Local Community</u></p>	<p>Maximum Points Available: 30</p>
<p><u>Facility Amenities</u></p>	<p>Maximum Points Available: 20</p>

<u>Facility Cleanliness & Compliance</u>	Maximum Points Available: 20
Total for Site Visit Evaluation	Total Points Available: 100

2.5 Proposal Submission

Proposer shall provide:

- (a) Seven (7) printed originals will be presented bound or in a three-ring binder.
- (b) A file link for SOU to download a PDF version of the entire document original proposal as a single document;
- (c) If the Proposer believes any of the proposal information is confidential as described in Section 2.6 of this RFQ, the proposer must provide a file link for SOU to download a Confidential PDF version of the proposal as a single document that has items that the Proposer considers confidential redacted. The Confidential PDF version cannot be locked and must allow SOU to remove redacted items if they do not meet the confidential information criteria. If no file link is provided for a Confidential PDF version SOU will assume Proposer does not consider any of the proposal information as confidential and treat it as such.
- (d) Delivery
 - (i) Printed hard copies shall be sent to:

Southern Oregon University
Office of the General Counsel
1250 Siskiyou Boulevard
Ashland, OR 9520
 - (ii) File links shall be delivered in writing in a separate letter and delivered with the printed hard copies. The file links shall also be sent via email to generalcounsel@sou.edu.

Proposals are due no later than the due date and time as set forth in Section 1 of this RFQ to the official and at the location set forth on page 1.

It is the Proposer's sole responsibility to ensure that its proposal is delivered and time-stamped, at the Bid Desk, prior to the RFQ closing date and time.

Proposals not time-stamped at the Bid Desk by the due date and time shall be considered late. SOU shall reject all late proposals.

Proposals will be submitted in a sealed envelope or box, with the following information provided on the outside of the package:

- (1) RFQ title;
- (2) RFQ number;
- (3) Proposer name; and
- (4) Proposer address.

2.6 Confidential Information

SOU is a public entity subject to the Oregon Public Records Law (ORS 192.311 to 192.478), which requires SOU to disclose all records generated or received in the transaction of University business, except as expressly exempted in ORS 192.345, 192.355, or other applicable law. Examples of such exemptions are trade secrets (ORS 192.345(2)) and computer programs (ORS 192.345(15)).

The Proposer shall deliver to SOU a file link to download a Confidential PDF version of the document. Proposer shall redact portions within the Confidential version of the document information it has determined as confidential under Oregon Public Records Law:

- (a) All pages of the Confidential version shall be marked "Confidential" on each page of the confidential document.
- (b) In its Confidential PDF version of the proposal, the Proposer shall provide a comment for each redacted item citing the specific statutory exemption in Oregon Public Records Law, which exempts any redacted portion of the Confidential document from disclosure.
- (c) This Section 2.6 will prevail in the event these provisions conflict with formatting or response instructions elsewhere in this document.
- (d) Should Proposer not provide a Confidential PDF version of a file as prescribed SOU will hold no portion of the proposal as confidential.
- (e) Proposer may not mark an entire proposal confidential. Should a proposal be submitted in this manner, SOU will hold no portion of the proposal as confidential, unless such a portion is redacted in accordance with this Section 2.6 and is determined by SOU to be exempt under the Oregon Public Records Law.

Notwithstanding the above procedures, SOU reserves the right to disclose information that SOU determines, in its sole discretion, is not exempt from disclosure or that SOU is directed to disclose by Oregon's Jackson County District Attorney or a court of competent jurisdiction.

Prior to disclosing such information, SOU will make reasonable attempts to notify the Proposer of the pending disclosure.

3. Proposal Evaluation and Award

3.1 Clarification of Responses

In the event that one or more proposals need clarification, SOU will request such clarification in writing and will afford the contacted Proposer(s) an opportunity to respond in kind, with the necessary clarification.

3.2 Site Visits/Informational Activities

At any point before or after the opening of proposals, SOU may conduct site visits, demonstrations, and informational and group activities with Proposers for the purpose of clarification to ensure full understanding of, and responsiveness to, the solicitation documents or to consider and respond to requests for modifications to the proposal requirements. SOU will use procedures designed to accord Proposers fair and equal treatment with respect to any opportunity for discussion and revisions of proposals.

3.3 Proposal Evaluation

The evaluation process of this RFQ will be comprised of a written proposal tier (Tier 1) and an interview/presentation tier (Tier 2).

An Evaluation Committee consisting of not less than three individuals shall evaluate the proposals. Each evaluator will independently evaluate and score proposals in accordance with the evaluation criteria. SOU may assign certain evaluators specific evaluation criteria, in alignment with the evaluator's expertise.

SOU may appoint separate evaluation teams for each tier of the evaluation process.

(a) Tier 1: Written Proposal Evaluation

- (i) Each evaluator shall independently score proposals in accordance with the evaluation criteria.
- (ii) SOU shall average the Tier 1 scores per category and then sum the category averages for a total written evaluation score for each proposal. SOU may establish a Competitive Range based on comparative score.

(b) Tier 2: Invitation for Interview

- (i) SOU may invite all Proposers in the Competitive Range to an interview with the evaluation team.

- (ii) SOU will schedule a mutually convenient interview time for the Proposer and SOU.

(c) **Tier 2: Interview Evaluation**

- (i) Each evaluator will score the interview evaluation criteria.
- (ii) SOU shall average the Tier 2 interview scores per category and will then sum the category averages for a total interview evaluation score for each proposal.

(d) **References**

SOU reserves the right to investigate references, including references other than those listed in a Proposer's submission. This inquiry may include, without limitation, an investigation of the past performance of any Proposer with respect to its successful performance of similar projects, compliance with specifications and contractual obligations, legal and regulatory compliance, completion or delivery of a project on schedule, and its lawful payment of employees and subcontractors.

3.4 Notification of Intent to Enter into Negotiations

SOU shall notify Proposers of its Intent to Enter into Negotiations with a selected Proposer.

3.5 Negotiation

- (a) After SOU has issued the Notice of Intent to Enter into Negotiations, SOU shall commence negotiations with the highest-ranked eligible Proposer.
- (b) At any time during negotiations, SOU may terminate negotiations with the highest-ranked Proposer, or the eligible Proposer with whom it is currently negotiating, if SOU believes that:
 - (i) The eligible Proposer is not negotiating in good faith; or
 - (ii) Further negotiations or negotiations with the eligible Proposer will not result in the parties agreeing to the terms and conditions of a final contract in a timely manner.
- (c) If SOU terminates negotiations with an eligible Proposer, SOU may then commence negotiations with the next-highest-ranked eligible Proposer.
- (d) SOU reserves the right to negotiate final contract terms with the selected Proposer(s) to the fullest extent allowed by law and in the best interest of SOU.

3.6 Award of Contract

If SOU awards a contract pursuant to this RFQ, it will award a contract to the responsible Proposer whose proposal SOU determines in writing is the most advantageous to SOU based on the evaluation process and criteria described in this RFQ, applicable preferences, and the outcome of any negotiations authorized by this RFQ.

4. Solicitation Terms and Conditions; Protest of Award

4.1 Proposer Cost of Response Preparation

Proposers shall bear sole responsibility for all costs incurred in preparing and providing their proposals in response to this RFQ. SOU is not liable to any Proposer for any loss or expense caused by or resulting from the cancellation of a solicitation or rejection of a proposal.

4.2 Submitted Materials are University Property

All material submitted for any portion of a proposal in response to this RFQ, or during any tier of this solicitation, shall become the property of SOU and will not be returned to the Proposer.

4.3 Protests

(a) Protest of Intent to Enter into Negotiations.

A Proposer may protest the Intent to Enter into Negotiations, provided:

- (i) The Proposer is adversely affected because the Proposer would be eligible to be selected for negotiation in the event that the protest is successful; and
- (ii) The reason for the protest is:
 - (1) All higher-ranked proposals are nonresponsive;
 - (2) SOU has failed to conduct the evaluation of proposals in accordance with the criteria or processes described in the solicitation materials;
 - (3) SOU has abused its discretion in rejecting the protestor's proposal as nonresponsive; or
 - (4) SOU's evaluation of proposals or SOU's subsequent determination of award is otherwise in violation of SOU's rules of procurement or applicable state statutes.

Address protest as follows:

PROTEST OF AWARD: RFQ NO. 2025-15
Office of the General Counsel
Phone:541-552-8055
Fax: 541-552-6337
Email: generalcounsel@sou.edu

- (5) All protests of award must be in writing and physically received by the procurement official no later than 3 p.m. on the deadline for submitting such protests set forth in Section 1.5 of this RFQ.
- (6) Protests must specify the grounds for the protest, including the specific citation of law, rule, regulation, or procedure upon which the protest is based. The judgment used in scoring by individual evaluators is not grounds for protest.
- (7) Protests not filed within the time specified in Section 1.5 of this RFQ, or which fail to cite the specific law, rule, regulation, or procedure upon which the protest is based, shall be dismissed. An issue that could have been raised by request for clarification or protest of the solicitation is not a ground for protest of award

ATTACHMENT A

DESCRIPTION OF SITE

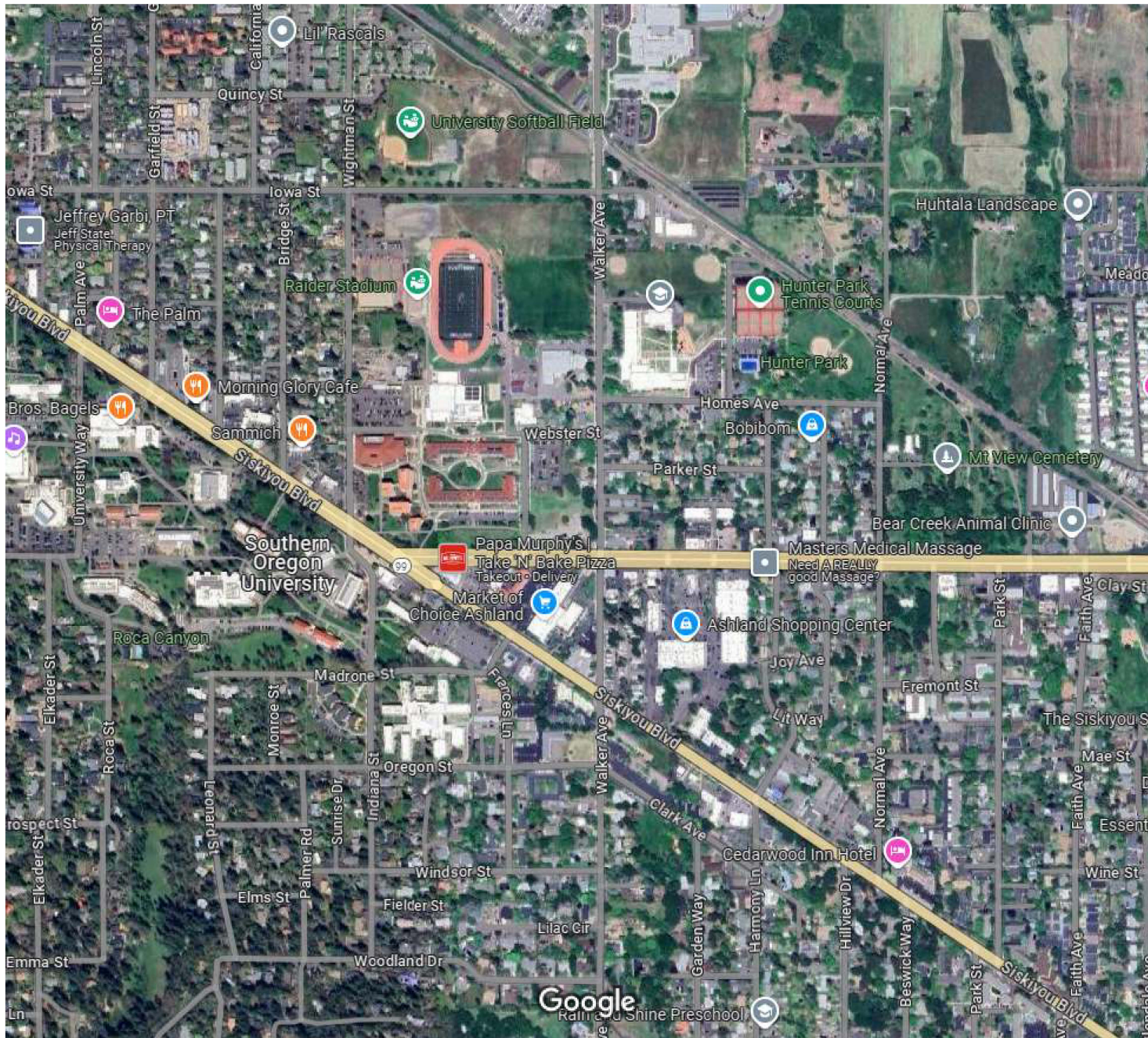
Cascade Complex Data

- Floor Area 194,467 gsf
- Prior Use: (9) dormitory buildings surrounding a “center core” which housed kitchen & dining facilities, student lounges, classrooms, mail services, administration and support facilities
- Built: 1960-1966
- Construction Type: primarily cast-in-place reinforced concrete and masonry
- Assessor’s Map & Tax Lot: 391E15BA – 3100
- Total parcel size: 11.04 acres
- Demolition/Redevelopment Area: 4.3 acres

Cascade Site Aerial



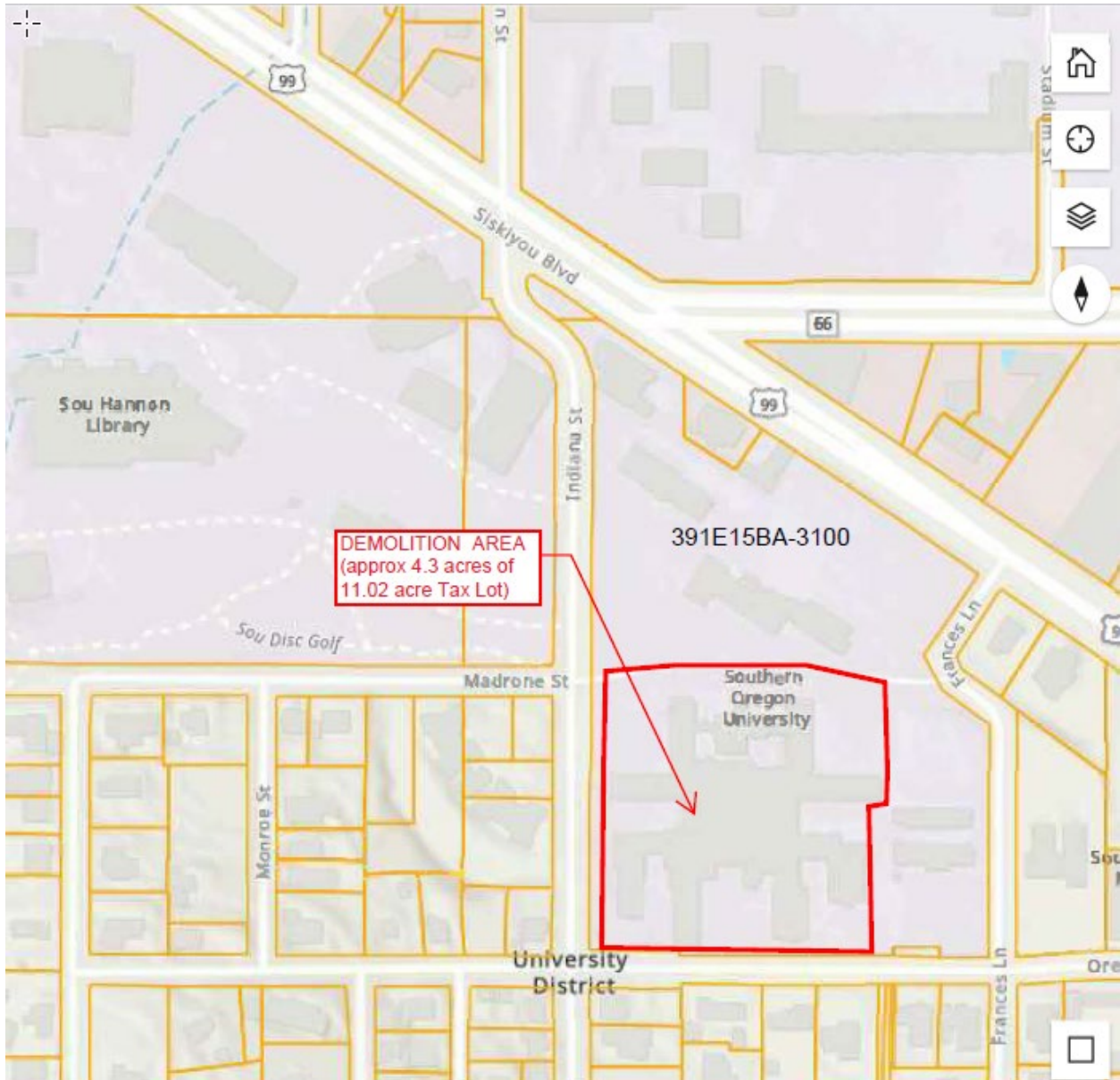
Cascade Area Map



SOU Cascade Demo - Work Limits



Cascade Assessor's Map



Cascade I & E View from the South East



Cascade D, A, & I View from the North East



Cascade D & I View from the North

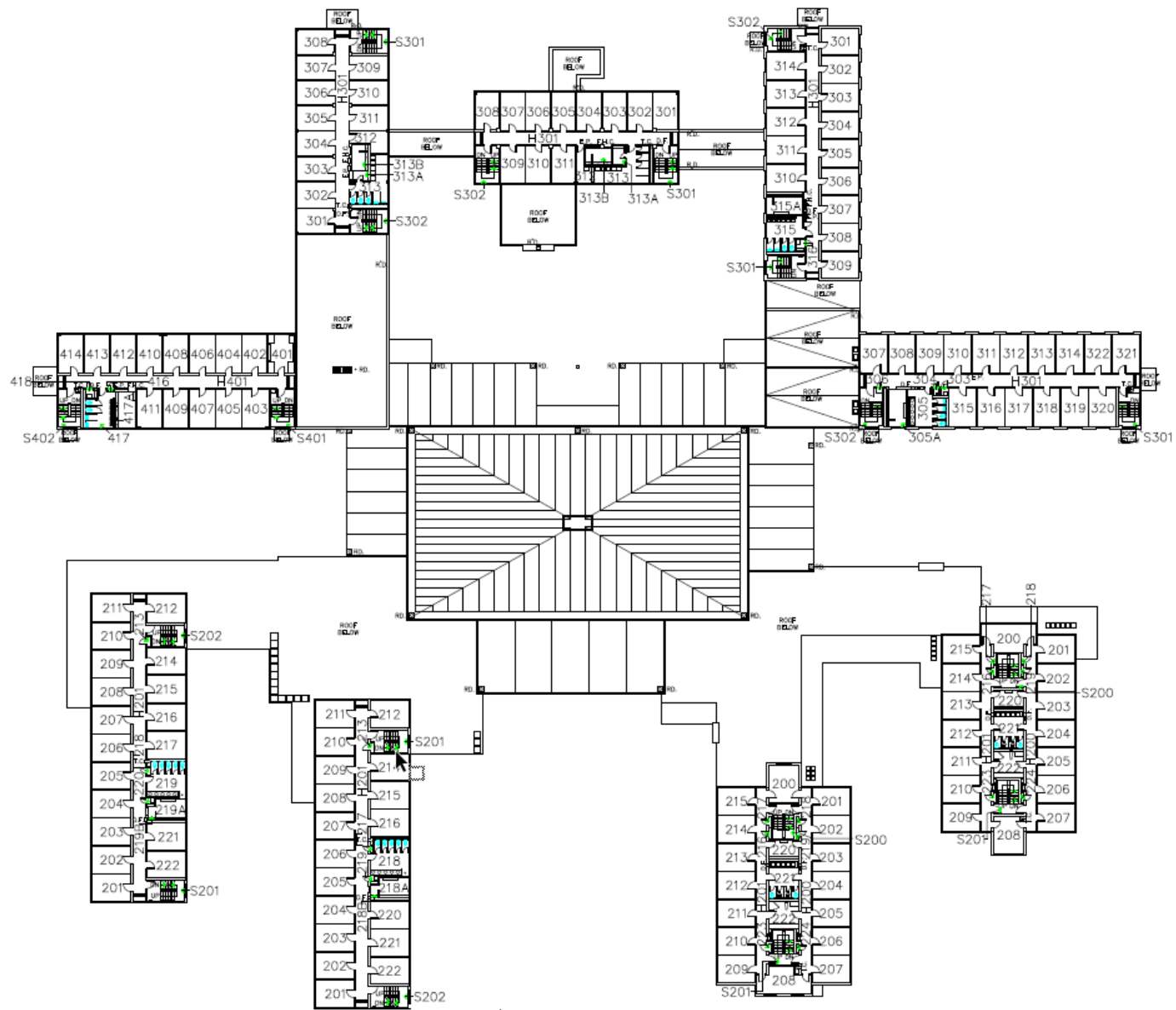


Cascade H & I View from the South

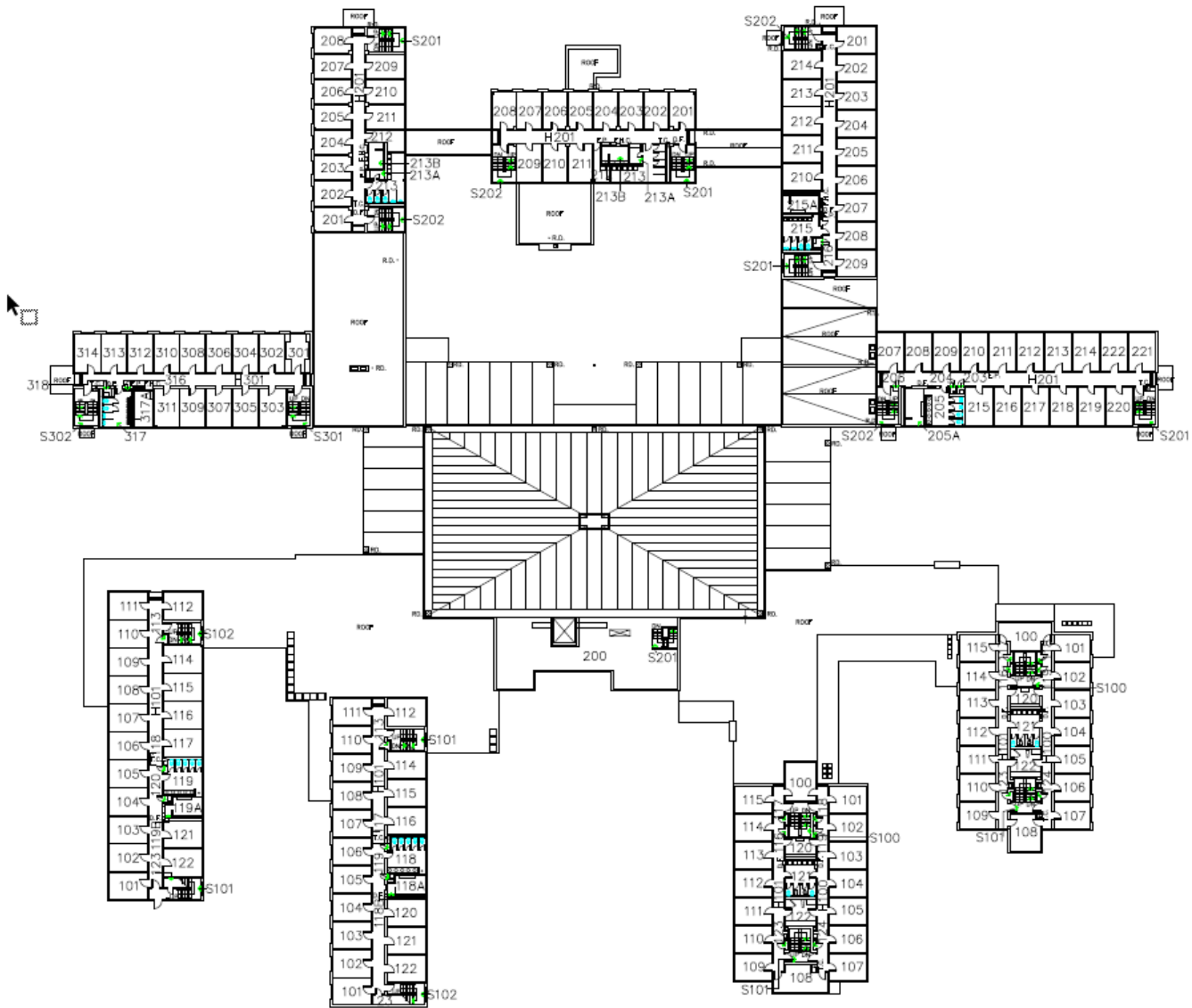


Cascade F & G View from South West

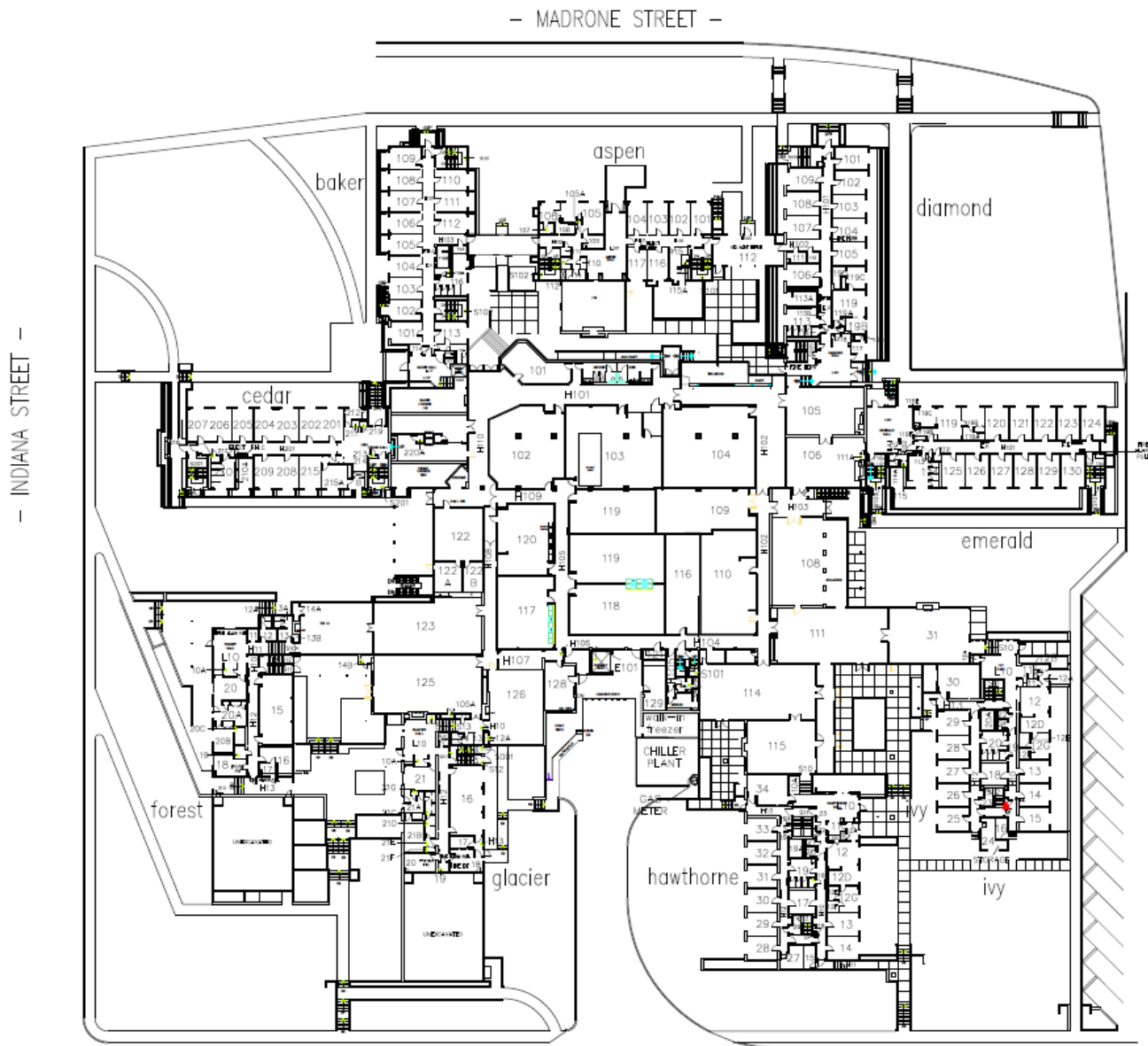




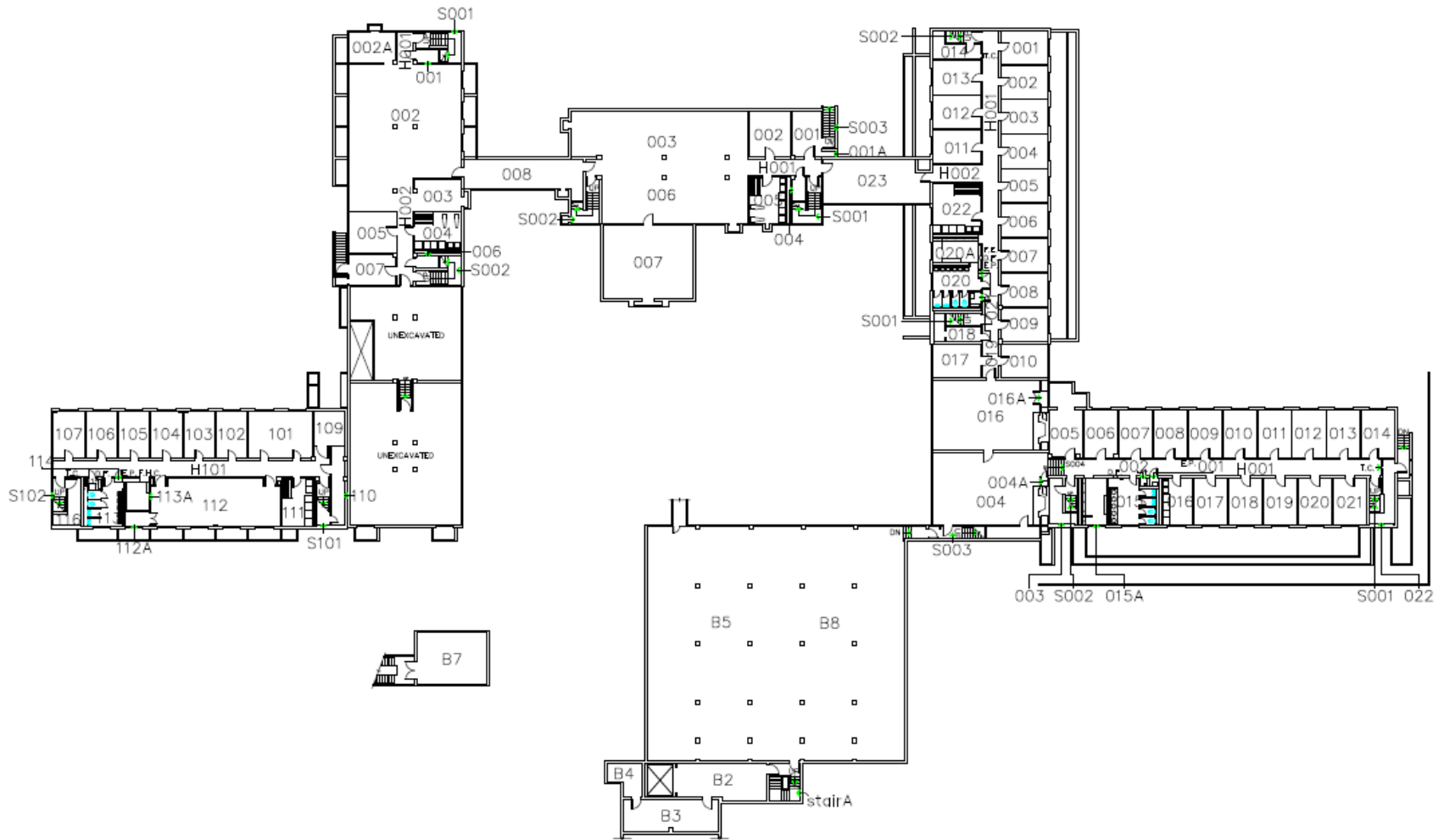
CASCADE - 3rd FLOOR



CASCADE - 2ND FLOOR



CASCADE — GROUND LEVEL



CASCADE – BASEMENT

ATTACHMENT B

PROPOSER CERTIFICATIONS AND REPRESENTATIONS

Proposed Project Description

**PROPOSAL FORM
(To Be Returned)**

1. ACKNOWLEDGEMENT OF RECEIPT OF ADDENDA

Addenda ___ through ___ received. (If addenda were issued, completion of this line is REQUIRED.)

2. CERTIFICATION OF NONDISCRIMINATION (ORS 279A.110)

The undersigned Proposer certifies that proposer has not discriminated and will not discriminate against a subcontractor in awarding a subcontract because the subcontractor is a disadvantaged business enterprise, a minority-owned business, a woman-owned business, a veteran-owned business, or an emerging small business that is certified under ORS 200.055.

3. STATE OF OREGON OFFICE OF MINORITY, WOMEN & EMERGING SMALL BUSINESS (OMWESB) CERTIFICATION

If your firm is currently certified by the State of Oregon Certification Office for Business Inclusion and Diversity (COBID) in any of these categories, please indicate that certification.

Disadvantage Business Enterprise (DBE)

Minority Business Enterprise (MBE)

Women Business Enterprise (WBE)

Emerging Small Business (ESB)

Veteran Business Enterprise (VBE)

4. PROPOSER’S SIGNATURE AND IDENTIFICATION

I hereby certify that this Proposal is genuine and that I have not entered into collusion with any other Proposer(s) or any other person(s).

Please print or type all information requested below (except where signature is required) and attach Proposal Security (if required) to this form:

Name of Proprietor, Partnership, or Corporation	Signature of Proprietor, Partner, or Corporate Officer:
Name	Signature
Street Address	Name of Signatory
Mailing Address	Date Signed
City, State, and Zip Code	If Corporation, Attest:
Phone Number	Secretary of Corporation
Employer ID Number	State of Incorporation

ATTACHMENT C

Specifications

I. Qualifications

Generally	
Q-1.1	Describe your company generally.
Q-1.2	Describe your company ownership.
Q-1.3	Describe your company executive management team and provide a brief background and length of service with the company for each.
Q-1.4	Describe your company culture and philosophy.
Q-1.5	Describe your general experience in the area of senior-living.
Q-1.6	Describe any experience you may have regarding retirement-living and integration with university campuses.
Q-1.7	Are there any reputational risks that we should know about regarding your company?
Marketing - As it relates to senior-living facilities.	
Q-2.1	Describe your general marketing philosophy.
Q-2.2	Describe your general marketing approach.
Q-2.3	Describe your marketing internal resources.
Q-2.4	Describe what external resources you typically use.
Q-2.5	Have you had any violations/citations, fines or lawsuits related to any marketing related activity in the last 10 years? If yes, please identify the issue and provide an explanation.
Q-2.6	Have any of your marketing projects failed or been abandoned in the last 10 years? If yes, please identify the project or facility and provide reasons for the failure or abandonment.
Development - As it relates to senior-living facilities.	
Q-2.1	Generally describe your new construction experience.
Q-2.2	Describe your development philosophy.
Q-2.3	Describe your community engagement experience.
Q-2.4	Describe your land use experience.
Q-2.5	Describe your architectural experience.
Q-2.6	Describe your construction contracting experience. Include any public contracting experience if you have it.
Q-2.7	Describe your construction project management experience.
Q-2.8	Describe your internal resources.
Q-2.9	Describe the external resources you typically use.

Development - As it relates to senior-living facilities.	
Q-2.10	Have you had any violations/citations, fines or lawsuits related to any development related activity in the last 10 years? If yes, please identify the issue and provide an explanation.
Q-2.11	Have you had any development projects, at any stage fail or you've chosen to abandon them in the last 10 years. If so please identify the project and provide reasons for the failure or abandonment.
Operations - As it relates to senior-living facilities.	
Q-3.1	Describe your general operating experience.
Q-3.2	Describe the scope of your operations experience.
Q-3.3	Describe your operating philosophy.
Q-3.4	Describe your philosophy of healthy aging and how you partner with residents to support engagement and build community.
Q-3.5	Describe your licensing and compliance experience.
Q-3.6	Describe your Human Resources approach and philosophy including but not limited to employee recruitment, retention, accountability, and compensation.
Q-3.7	Describe your approach to facility service and maintenance.
Q-3.8	Describe your approach regarding safety and security.
Q-3.9	Describe your internal resources.
Q-3.10	Describe the external resources you typically uses.
Q-3.11	Have you had any violations/citations, fines or lawsuits related to any operations related activity in the last 10 year that has resulted in media attention or substantial loss? If yes, please identify the issue and provide an explanation.
Q-3.12	Have you had any operational facility /contracts non-renewed or taken over by a regulatory agency in the last 10 years? If yes, please identify the facility and provide reasons for the failure or abandonment.
People - Who can we expect.	
Q-4.1	Should you win this RFQ, please identify the team we would expect to work with over the next two years.
Q-4.2	Please provide a brief overview of each team member including length of time with your company, general experience, education, and at least three projects of similar size and scope.
Equity, Diversity, Inclusion and Sustainability -Understanding your commitment	
Q-5.1	Please provide information about how your company mitigates the environmental impact of its services, such as greenhouse gas emissions, amount of waste generated, water and energy use, or other areas related to your services.
Q-5.2	Provide information on your company diversity strategy.
Q-5.3	Consideration will be given to Proposers that meet the University's vision and goals for environmental sustainability and social equity. Please provide any policies or information that would be helpful to SOU understanding your commitment.

II. Financial History & Capacity

Generally	
F-1.1	Describe the overall financial condition of your company and any of its affiliates.
F-1.2	Provide your company's audited financial statements for the past three years.
F-1.3	Provide your company's cash flow statements for the past three years.
F-1.4	Provide any financial certifications or awards you may have received.
F-1.5	Have you experienced any significant financial challenges in the past 10 years? If yes, please describe them.
F-1.6	Have you or any of your affiliates had any violations/citations, fines or lawsuits related to any finance related activity in the last 10 years? If yes, please identify the issue and provide an explanation.
F-1.7	Have you or any of your affiliates been in violation of any bond covenant or financing agreement in the last 10 years? If yes, please identify the issue and provide an explanation.
F-1.8	Have you or any of your affiliates filed for bankruptcy or been forced into an involuntary financial restructure in the last 10 years? If yes, please identify the issue and provide an explanation.
Capacity	
F-2.1	Describe the financing model(s) you think is most likely for this project.
F-2.2	Provide your experience with financing model(s) you think are likely.
F-2.3	Describe your internal resources and capacity to finance this project.
F-2.4	Describe what external resources you would rely upon to finance this project.
F-2.5	Have you failed at financing a project using this model(s) or any model in the last 10 years? If yes, please identify the project and provide an explanation.

III. Project Experience

Project #1	
PE-1.1	Provide the name of the project, location, owner, and website.
PE-1.2	Describe the project generally including type, scope and size.
PE-1.3	Describe your company's role in the development, operation, or both.
PE-1.4	Describe the role of third party contractors in the development, operations, or both.
PE-1.5	If you were involved, describe how the project was financed.
PE-1.6	If you were involved in the development share the high level project costs.
PE-1.7	If you were involved share the development timeline by phase.
PE-1.8	Describe any special information about the project (e.g. a university related project)
Project #2	
PE-2.1	Provide the name of the project, location, owner, and website.
PE-2.2	Describe the project generally including type, scope and size.
PE-2.3	Describe your company's role in the development, operation, or both.
PE-2.4	Describe the role of third party contractors in the development, operations, or both.
PE-2.5	If you were involved describe how the project was financed.
PE-2.6	If you were involved in the development share the high level project costs.
PE-2.7	If you were involved share the development timeline by phase.
PE-2.8	Describe any special information about the project (e.g. a university related project)
Project #3	
PE-3.1	Provide the name of the project, location, owner, and website.
PE-3.2	Describe the project generally including type, scope and size.
PE-3.3	Describe your company's role in the development, operation, or both.
PE-3.4	Describe the role of third party contractors in the development, operations, or both.
PE-3.5	If you were involved describe how the project was financed.
PE-3.6	If you were involved in the development share the high level project costs.
PE-3.7	If you were involved share the development timeline by phase.
PE-3.8	Describe any special information about the project (e.g. a university related project)

Project #4	
PE-4.1	Provide the name of the project, location, owner, and website.
PE-4.2	Describe the project generally including type, scope and size.
PE-4.3	Describe your company's role in the development, operation, or both.
PE-4.4	Describe the role of third party contractors in the development, operations, or both.
PE-4.5	If you were involved describe how the project was financed.
PE-4.6	If you were involved in the development share the high level project costs.
PE-4.7	If you were involved share the development timeline by phase.
PE-4.8	Describe any special information about the project (e.g. a university related project)
Project #5	
PE-5.1	Provide the name of the project, location, owner, and website.
PE-5.2	Describe the project generally including type, scope and size.
PE-5.3	Describe your company's role in the development, operation, or both.
PE-5.4	Describe the role of third party contractors in the development, operations, or both.
PE-5.5	If you were involved describe how the project was financed.
PE-5.6	If you were involved in the development share the high level project costs.
PE-5.7	If you were involved share the development timeline by phase.
PE-5.8	Describe any special information about the project (e.g. a university related project)

IV. References

Reference #1	
R-1.1	Provide the name of the reference.
R-1.2	Provide the contact information for the reference including, address, email address, phone, and website.
R-1.3	Identify the type of reference owner, partner, developer, resident, or other.
R-1.4	Describe the company's interaction with the reference and any specific projects company has been involved with regarding this reference.
Reference #2	
R-2.1	Provide the name of the reference.
R-2.2	Provide the contact information for the reference including, address, email address, phone, and website.
R-2.3	Identify the type of reference owner, partner, developer, resident, or other.
R-2.4	Describe the company's interaction with the reference and any specific projects company has been involved with regarding this reference.
Reference #3	
R-3.1	Provide the name of the reference.
R-3.2	Provide the contact information for the reference including, address, email address, phone, and website.
R-3.3	Identify the type of reference owner, partner, developer, resident, or other.
R-3.4	Describe the company's interaction with the reference and any specific projects company has been involved with regarding this reference.
Reference #4	
R-4.1	Provide the name of the reference.
R-4.2	Provide the contact information for the reference including, address, email address, phone, and website.
R-4.3	Identify the type of reference owner, partner, developer, resident, or other.
R-4.4	Describe the company's interaction with the reference and any specific projects company has been involved with regarding this reference.
Reference #5	
R-5.1	Provide the name of the reference.
R-5.2	Provide the contact information for the reference including, address, email address, phone, and website.
R-5.3	Identify the type of reference owner, partner, developer, resident, or other.
R-5.4	Describe the company's interaction with the reference and any specific projects company has been involved with regarding this reference.

ATTACHMENT D

Project Development Plan

In addition to the information requested in the body of the RFQ, SOU asks each Proposer to submit a proposed high-level Project Development Plan generally consistent with the following framework:

1. Describe Proposer's overall vision and description of the Project.
 - (a) Describe Proposer's thoughts on integrating the Project and SOU's educational mission and goals as well as overall campus life.
2. Describe the Proposer's approach to integrating the Project in the community, which includes Ashland, Oregon, and the Southern Oregon region.
3. The proposal should provide general project information, including the target demographics and how the Project would be marketed to potential residents.
4. Describe the range of services that the Proposer would provide.
5. Describe Proposer's approach to constructing the Project on the property described in Attachment A. The site is currently part of the University Master Plan and is in the process of being amended. The Proposer would be primarily responsible for obtaining the required land use entitlements, but SOU would support these efforts. Construction would be subject to the State of Oregon prevailing wage rates (*see* ORS 279C.800 to 870).
6. The proposal shall describe at a high-level:
 - (a) The preferred operating type for the Project (e.g., Continuing Care Retirement Community, Rental Model, or other).
 - (b) The preliminary financial operating model for the Project, including potential revenue estimates to SOU.
 - (c) A detailed financing plan, including typical financial partners.
 - (d) A construction schedule and estimated time to completion.
7. The proposal should describe the Proposer's thoughts on the structure of the relationship.
 - (a) The Proposer may enter into a long-term ground lease with SOU. SOU is open to a term of up to 100 years. The lease would be subject to a requirement to operate and maintain a senior housing facility in good standing and high repute over the lease term.

- (i)** SOU will not take an ownership interest or operational role in the Project, but would enter into an operating agreement to provide amenities and services to the residents of the Project. The Proposer should describe the services/programs desired from SOU in an operating agreement.

- (ii)** Although the above represents SOU's preferred structure, SOU is open to other innovative proposals that will accomplish its primary goals.