

**Addendum # 01**  
**RFQ 2025-15 Senior Housing Providers**  
**Questions and Answers**

- Q1. Is SOU planning on procuring separate P3 counsel for this project?
- a. Yes.
- Q2. Does SOU have any debt capacity to take advantage of tax-exempt financing?
- a. No.
- Q3. What role does the University expect to play in a prospective senior living development project? Is the University seeking to lease the land, sell the property, and/or be an active sponsor of the project (either through an NFP or FP de novo enterprise)?
- a. Please see the RFQ.
- Q4. Is PRS the presumed collaborator, and are others competing against their potential role as developer and manager?
- a. No.
- Q5. Has any market research and pre-development work been done already, and if so, will the University please share this information with the bidders?
- a. No, SOU has not performed market research for this project.
- Q6. Who is the demolition company?
- a. Staton Companies based out of Eugene.
- Q7. When does SOU anticipate the city of Ashland will decide about the master plan?
- a. SOU anticipates that the Master Plan will be approved by the City of Ashland in July of 2025.
- Q8. Are there are items on the SOU master plan which are “off-track” and could result in the Master plan being delayed?
- a. No.
- Q9. Will SOU need to go through a type three hearing?
- a. Yes. SOU anticipates that a type three hearing will be requested by the city.
- Q10. Is SOU planning on selling any other properties other than lot 34?
- a. Yes. Residential development properties on Roca Street and Henry Street; a single family residence on Madrone Street.
- Q11. Can SOU give some details about the Osher Life Long Institute? (“OLLI”)
- a. SOU hosts one of largest OLLI chapters in the country. Members pay one flat rate for the year, and they can take as many OLLI classes in a year as they want. You can get additional information on the SOU OLLI program in the bid packet (<https://sou.edu/olli/>)
- Q12. What is the current function of Cox Hall?
- a. It is primarily used by Housing for conference operation. Their season typically runs from March through late October/early November.
- Q13. Is the Campbell Center (OLLI’s main location) adequate for delivering current OLLI operations?
- a. OLLI has limited space and they provide classes at other areas on campus as well as at off-campus facilities like the Medford Higher Education Center.

Q14. Is there a senior component to Cox Hall as a part of its current operations?

a. No.

Q15. Can you speak to any medical components that exist on-site? Is there a contract with La Clinica and SOU? Is there a vision that the seniors that would be moving into a community that would have access to on campus health services?

a. SOU has changed its health services on campus. We used to have a health center that was run by the university on campus. This year we converted to a contract which is paid for from student fees with La Clinica which is a Federally Qualified Health Center (FQHC). This is the first year of the contract. We had to subsidize the previous health center. La Clinica has a large footprint in the valley and is able to bill insurance. We are having a continual conversation with them about what that relationship continues to look like. We have an interest in eventually providing faculty and staff the opportunity to use the facility as well. SOU believes that La Clinica is open to a variety of health-related models. The hope is that La Clinica can provide more health services than were previously offered under SOU. SOU also hosts Oregon Health Sciences University (OHSU) on campus, so there is a population of student nurses on campus.

Q16. SOU has mentioned that they envision the residents of this facility to have access to things like SOU classes, OLLI membership, SOU Athletics games etc. Is SOU open to a separate agreement outside of the property agreement to memorialize these items?

a. Yes, SOU would be open to an agreement as this should be a partnership.

Q17. Can SOU provide a list of bidders who attended the pre-bid meeting?

a. Yes, please see addendum #2.

Q18. What were the limitations in the existing structure (Cascade)?

a. Cascade has been demolished.

Q19. Is SOU limited by the previous foot print of Cascade when it comes to constructing the Senior Living Facility?

a. We believe the building would be within the existing building envelope but would be open to creative solutions.

Q20. Is there max height on the building?

a. Max height has not been established yet, but the SOU Master Plan is asking for five stories.

Q21. When is SOU anticipating selecting a partner by?

a. SOU would like to select a partner before July 2025.

Q22. Have any community members expressed interest in moving into the facility once it is built?

a. Yes, roughly 200 people have expressed interest.

Q23. As far as agreements go with SOU for things like ability to audit classes, attend games and use general amenities by those living in the facility, would that be a separate agreement?

a. Yes, SOU would be open to an agreement like this.

Q24. What are the enrollment numbers and how have they grown or stabilized over the years?

a. SOU's headcount is 3253.

- Q25. What is the general make of the student body? How many students are from Oregon?
- a. SOU is a regionally responsive institution. Many of our students are from the local area. Because SOU is so close to the California border, about one third of our enrollment comes from California. We anticipate this may increase with cuts coming out of public institution in the State of California.
- Q26. Is there any attitude or preconception about whether the seniors will be recipients of healthcare or not, meaning a licensed, assisted living versus not. Is there a preference from the university side?
- a. SOU does not have preconceived notions related to licensed healthcare.
- Q27. Is SOU open to an operating agreement with the winning bidder?
- a. Yes.
- Q28. Have you performed any market research specific to the number of age and income-qualified populations in the market?
- a. On average, Oregon has an older population at large. Jackson County has the oldest population of any county in Oregon. Within Jackson County, Ashland has the oldest population of any other city.
- Q29. Does SOU prefer financing solutions, debt equity, or tax-exempt financing?
- a. SOU wants a strong financial partner and is open to various capitol stacks that makes the most sense for this opportunity.
- Q30. Who is the owner of the underlying land?
- a. SOU is the underlying owner of the land, but technically, the State of Oregon owns it. If the state were ever to shut down SOU, the reversion would be to the State of Oregon, and they would then be obligated. We are not worried about a long-term lease related to that land or any kind of state approvals.
- Q31. Given that SOU owns the land, will this be a prevailing wage job?
- a. At this point, SOU believes this will be a prevailing wage job.
- Q32. Does SOU have a tax exemption on the land? If so, will that carry forward?
- a. SOU believes that as all residents would be students, it would qualify for tax exemption.
- Q33. Is SOU willing to grant branding rights (university colorways, logo, using SOU in the name, etc.) to the Senior Living Facility?
- a. SOU would be open to some sort of limited marketing agreement.
- Q34. Does SOU view this as a public-private partnership (P3) wherein long term operating and management (O&M) for the facility would be provided by private counterparty?
- a. SOU is looking for a partnership were the majority of, if not all, the operations and management would be done by the third-party provider.
- Q35. As a major employer in the area, does SOU have any insight on the availability of labor particularly for lower wage entry level jobs.
- a. We have no additional insight other than what is publicly available from the Oregon Employment Department and Sothern Oregon Regional Economic Development Inc.
- Q36. How many students live on campus and what is the general make of the students that live on campus?
- a. SOU has occupancy available for 900 students in the halls and 169 student and family housing units.

- Q37. Does the Master Plan include primary vehicle access?
- a. This will be based on a city determination on overall Master Plan impacts. A traffic study could be required.
- Q38. What systems are located at the corner of Indiana Street and Oregon Street?
- a. A full array of public utilities are located within in the City Right-of-Way. SOU has an irrigation filter plant and a storm drain at the southwest corner of the Cascade Tax Lot.
- Q39. Will Talent Irrigation District (TID) water be available for the facility?
- a. Yes.
- Q40. Is the existing structure connected to the campus systems?
- a. A utility tunnel connected the Cascade complex to campus utilities (steam, chilled water, data). The tunnel has been capped at the north end of the site and could be extended into the new development if desired.
- Q41. Can SOU provide additional details about the demolition?
- a. Staton Companies is doing the demolition and is scheduled to be finished in mid-April. Buildings are being demolished down to the basement floor slabs. All debris other than concrete and masonry is being hauled off-site and recycled where possible. The concrete and masonry is being crushed (into 2 inch minus particles) on site and placed as structural fill in the former basement excavations.
- Q42. Where does the existing drainage system end?
- a. The primary site storm drain runs just west of Cox Hall and connects to the City storm system at Siskiyou Boulevard. The old drawings show it as a 21-inch pipe.
- Q43. Does SOU have a survey of the original site?
- a. No.
- Q44. What year was the Student Recreation Center built?
- a. It was built in 2016. We occupied Lithia-SRC in early 2018. The Student Recreation Center portion was paid for with student fees while, the Lithia portion of the building was paid for with state bond funds.
- Q45. What has the campus standard for LEED certification been in the past?
- a. SOU design standards require our major projects be designed to meet LEED Silver minimum. While SOU has gained LEED certification for several buildings in the recent past, we have not sought LEED certification on recent buildings due to excessive LEED certification costs.
- Q46. Will SOU require the project to be LEED certified?
- a. SOU Design standard would meet LEED Silver Certification but it is unlikely to be required.
- Q47. Will the project need to include SEED as the site is located on State of Oregon property?
- a. State of Oregon SEED analysis is not required.
- Q48. What is the housing capacity of North Campus Village?
- a. 700 beds.
- Q49. What will the make-up of the evaluation committee be?
- a. Undetermined at this time.

Q50. What is SOU's goal for solar power?

- a. SOU has taken the initiative to be the first publicly funded university to generate on campus 100% of its electrical usage. Currently we are at 17% with 3 more arrays scheduled to be added this year.

Q51. Have recent administration changes affected SOU's solar funding?

- a. While we have a \$2M matching solar grant pending with the Federal Department of Energy, we are not optimistic it will come through given the new administration's priorities.

Q52. When was SOU's last master plan completed?

- a. 15 years ago.

Q53. Is there a pool at the Student Recreation Center?

- a. No.