REQUEST FOR PROPOSALS

To provide

STUDENT HOUSING TURNKEY DEVELOPMENT SERVICES

Requested by

UW-Fond du Lac Foundation

RFP Release Date: June 30, 2015
Proposal Due: August 7, 2015 4:30 p.m.

Note: The UW-Fond du Lac Foundation is not part of the University of Wisconsin – Fond du Lac or the University of Wisconsin System, nor is it an agency or instrumentality of the State of Wisconsin. It is a private, non-profit corporation to support the UW-Fond du Lac. This RFP has been prepared and circulated solely by the Foundation for its sole purposes. While the Foundation may include representatives of the UW-Fond du Lac in an advisory capacity in the Foundation’s review process, all decisions made hereunder will be the decisions of the Foundation. This RFP is not a publication or the work product of the University of Wisconsin – Fond du Lac, the University of Wisconsin System, or the State of Wisconsin nor will any project developed hereunder be a public project of the University of Wisconsin – Fond du Lac, the University of Wisconsin System, or the State of Wisconsin.
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1 BACKGROUND

1.1 Objective

The University of Wisconsin-Fond du Lac Foundation ("Foundation") is seeking proposals from qualified development firms (the ‘Provider’ or ‘Developer’ or ‘Respondent’) to provide comprehensive turnkey development services for a student housing facility and programming services on-site provided by the Developer. The building will constitute a project. The goal of the Foundation is to solicit proposals that provide between 76 and 120 beds for students, with the mix of housing and programming consistent with the needs of the University of Wisconsin-Fond du Lac (“UW-FDL” or “University”) and the student body. The project must be completed by June 1, 2016 or by the proposed completion date as recommended by the developer per this document.

The objective of this Request for Proposals (RFP) is to select a Developer with demonstrated experience and success in (1) designing and constructing student housing, (2) providing quality residential life programming and (3) providing project financing that will allow for competitive leasing rates. Proposals will be pre-qualified based on the Developers’ submissions and a selection committee will make the final selection based on the qualifications of the Developers. The selected Provider must also have the ability and willingness to agree to a long-term land lease with Fond du Lac County, which will own the property on which the structure will be located. The final Developer’s Agreement will be between the Developer and Fond du Lac County.

Developers are encouraged to organize teams in the most effective manner necessary to respond to this RFP. The proposed team shall include firms necessary to provide services for all phases of development projects. All legal structures permitted in the State of Wisconsin will be considered including a sole proprietorship, a partnership, a joint venture, a limited liability corporation, or a corporation.

1.2 University of Wisconsin – Fond du Lac

UW-FDL is one of 13 publicly supported, two-year campuses of UW Colleges in the University of Wisconsin System. Founded in 1966 by a formal resolution of support by the Fond du Lac County Board of Supervisors, UW-FDL opened its doors to students on September 9, 1968. UW-FDL is fully accredited and awards the Associate of Arts and Science Degree, in addition to a commitment to deliver the first two years of high-quality liberal arts and sciences foundational curriculum to students pursuing a bachelor’s degree. In partnership with several of the University of Wisconsin System's four-year campuses, UW-FDL offers collaborative bachelor's degrees in select areas of study with UW-Oshkosh, UW-Milwaukee, UW-Platteville, and UW-Stevens Point.

The UW-FDL campus is located in a park-like setting on 183 acres, including the 60 acre Gottfried Prairie and Arboretum. The main campus, with buildings connected by tunnels or hallways, includes the Art Building, Administration/Extension Building, University Center (established in 2000 to include: Commons, Kitchen/Café, Library, Prairie Theater, Music Suite, and a Large Group Instructional Room), Classroom Building, and Science Building. The Physical Plant and Gymnasium are free-standing buildings. UW-FDL shares a unique collaboration with Fond du Lac County, who owns the land and buildings, to ensure the community has access to a quality University of Wisconsin college education.

1.3 No Existing Campus Housing

There is currently no on-campus housing for students attending UW-FDL. A recent housing feasibility study (including an extensive student survey with a return rate of 20%) conducted by national higher
education consulting firm Noel-Levitz indicates a need for and strong interest in student housing.

The UW-FDL student enrollment is projected to remain relatively stable based on recent enrollment data and projected enrollment for the near future. In Fall of 2014, student enrollment included a headcount of 626, with 449 full-time equivalents. In Spring of 2015, student enrollment included a headcount of 782, with 515 full-time equivalents.

The campus has been a commuter campus since it opened in 1968. There are currently no automobile restrictions imposed on students attending classes and there is no charge for access to the ample parking on campus. There are several large surface parking lots provided for students, all located adjacent to the main campus buildings.

1.4 Residence Hall Market Study

As mentioned in Section 1.3, UW-FDL contracted with national higher education consultants Noel-Levitz which conducted a "Student Housing Analysis in the City of Fond du Lac, Wisconsin". The Executive Summary will be distributed at the Proposer’s Conference and an electronic copy of the full report is available upon request. That report concluded:

"Based on our analysis of the Fond du Lac Site Effective Market Area, interviews with area realtors and school representatives, analysis of school enrollment trends, and current market conditions, it is our opinion that a market exists for a student housing development as proposed in this report."

The report summarized that a market exists among UW-FDL students for a project consisting of: 6 individual two-bedroom (12 beds), two-bath units, of 950 square feet with a monthly rent per bed of $500; 6 shared two-bedroom (24 beds), two-bath units of 1,050 square feet with a monthly rent per bed of $400; and 10 four-bedroom (40 beds), four-bath units of 1,350 square feet with a monthly rent per bed of $450; thus totaling 22 units containing 76 bedrooms and bathrooms.

Factoring in the enrollment trends at two neighboring colleges (a private four-year university and a public technical college both within .5 miles), the number of beds in the project could be expanded considerably, with space prioritized for UW-FDL students and then offered to the neighboring college students as available.

2 DEVELOPMENT SERVICES

2.1 Overview

The Foundation has identified a need for the provision of on-campus student housing and residence life programming and is seeking proposals from Providers who will ultimately enter into a turnkey development agreement with Fond du Lac County for planning, design, financing, construction, and the on-going operation/management of the Project based on the results of the "Student Housing Analysis" conducted by Noel-Levitz. As described in Section 1.1 and further detailed in Section 4, a Provider will be selected through a two-step process. The Foundation has not developed detailed program requirements for the Project. The Project set forth in the following sections provides desired elements, which must be balanced against the need for the project to be financially viable for the Provider. If a proposal is selected, Fond du Lac County will enter into an agreement with the selected Provider per the requirements of the scope of work set forth below and establish an acceptable time frame for completion of the work.
2.2 Scope of Work
The scope of work for the project will be divided into three parts, detailed in Parts A, B, and C below. The Foundation is seeking a developer to enter into a comprehensive development agreement with Fond du Lac County for planning, designing, financing, construction, on-going management and program operation of a student residence life facility. Developers will include information on their ability, commitment, and qualifications to provide for all aspects of this project, including those outlined below.

Although it is anticipated that the project will proceed with Part B (Development Phase), the project or relationship may be cancelled rather than proceed further than Part A (Pre-Design). If this occurs, expenses incurred by the Developer in Part A shall be solely the responsibility of the Developer.

2.2.1 Pre-Design (Part A)
As part of the Pre-Design scope of work, the Developer shall:

- Assist the Foundation in the development and preparation of a Project program. The program will include budget and time requirements, space requirements and relationships, and will outline construction specifications.
- Evaluate the site with regard to access, traffic, drainage, parking, building placement, and other considerations affecting the building, the environment and energy use, as well as information regarding all applicable governmental laws, regulations, and requirements. The Developer shall provide a current survey and geotechnical reports as necessary to support the preliminary design concepts, budget, and construction schedule.
- Demonstrate the final product will provide an inviting and complementary building for the campus.
- Provide a preliminary schedule for the Foundation’s approval. The schedule shall show activities of the Developer and the Foundation necessary to meet the completion requirements.
- Prepare for the Foundation’s approval an estimate of the total development cost of the Project including construction, furniture, fixtures, equipment, soft costs, contingency, and financing costs.
- Prepare and submit for the Foundation’s approval schematic design documents based upon the preliminary evaluation discussed above. The Developer shall also submit a statement of the proposed contract price, a final schedule for the construction of the Project, a financial pro forma for the Project, and any other information necessary to complete the agreement. Preliminary design documents shall include conceptual drawings, outline specifications, and other documents to fully describe the size, quality, and character of the facility, architectural, structural, mechanical, and electrical systems, and the materials proposed for the project.

2.2.2 Design/Build (Part B)
As part of the Design/Build scope of work, the Developer shall:

- Provide all services necessary to design and construct the project in accordance with Part A as described in Section 2.2.1, as modified by agreement of both parties.
- Based on the preliminary plan, develop and submit design development and construction documents for review and approval.
- Commit to build the project for an agreed upon guaranteed delivery date.
- Be responsible for obtaining all necessary regulatory and jurisdictional approvals and entitlements.
- Construct the Project in accordance with the construction documents previously approved.
- Commit to maximizing the participation of local suppliers, subcontractors and labor.
- Manage the entirety of the design/build services until facility completion.
2.2.3 On-going Management of Operations (Part C)

As part of the On-going Management of Operations scope of work, the Developer shall:

- Provide a plan to address all services and programs to support residence life for the Project.
- Provide a plan that addresses building maintenance, security, staffing, occupancy requirements, and establishing rental rates for the completed Project.
- Provide a plan detailing intended collaboration between provider and the University.
- Provide a compliance and reporting plan – as well as the ability to modify plans based on changes to requirements - for applicable federal/state/university regulations including: *Title IX, Violence Against Women Act, The Save Act, The Jeanne Clery Disclosure of Campus Security Policy and Campus Crime Statistics Act* and University of Wisconsin System policies (UWS Chapter 17: *Student Non-Academic Disciplinary Procedures* and UWS Chapter 18: *Conduct on University Lands*). Copies of the UWS policies will be distributed at the Proposer’s Conference.
- Provide a plan demonstrating timely response and willingness to comply with campus information requests and compliance requirements.

2.3 Program Summary

2.3.1 Objectives

To meet the needs of UW-FDL and its students, the development of housing and other facilities must meet the following objectives:

- Provide operationally affordable housing for students
- Provide a safe and secure facility for student residential living
- Allow the University to provide programming in the facility
- Meet the pressing facilities needs of the University
- Provide living/learning opportunities through the inclusion of features such as shared spaces
- Leverage energy conservation and renewable energy initiatives
- Provide a design that is suitable for the site as described in section 2.3.3
- Deliver the project by June 1, 2016, in the most efficient and cost-effective manner
- Ensure adequate on-going facility staffing and residence life programming for Part C of the project to manage the facility after Parts A and B are completed.

Developers are encouraged to organize their proposal in the most effective manner necessary to respond to this RFP. Responses should include general information on any other firms or partners necessary to provide services for all three phases of the project. All legal structures permitted in the State of Wisconsin will be considered, including a sole proprietorship, a partnership, a joint venture, a limited liability corporation, or a corporation.

The program overview set forth in the following sections provides an outline description of the desired elements of the program, which must be balanced against the need for the project to be financially self-sustaining.

2.3.2 Building Program

The Project will include the following components:

- Living space for 76-120 students that should include:
  - Durable, functional furnishings and finishes
  - Range, refrigerator, dishwasher, and microwave
Individual room or suite environmental/temperature controls

- Project Support should include:
  - Common areas for shared student activities, studying, media, or meetings
  - Roommate matching services
  - Individual leases
  - Scheduled social/recreational activities for residents
  - Adequate storage
  - Common or individual laundry
  - Secure wireless internet access for the residence hall
  - Off-street parking
  - Industry-standard fire alarms and suppression systems
  - Appropriate security/safety measures

The selected developer will work with the Foundation, the University, and Fond du Lac County in Parts A and B to develop the building program fully before proceeding to construction.

### 2.3.3 Site Designs

UW-FDL would like to maximize the number of beds consistent with sound planning principles, zoning regulations, and the creation of a quality living environment for the students. The potential site for the housing facility has been identified within the current campus property (owned by Fond du Lac County). Full details for the site will be provided at the Proposer’s Conference. The land will be leased by the developer from Fond du Lac County in a long-term lease agreement, with options for renewal. If the developer finds this unsatisfactory, a proposed lease term should be included with explanation in the proposal. Site designs shall consider the following requirements:

- Evaluate identified site with regard to access, traffic, drainage, parking, building placement, utilities, and other considerations affecting the building, the environment and energy use, as well as information regarding all applicable governmental laws, regulations, and requirements
- Building placement to take full advantage of views and sustainable environmental opportunities
- Relation of new buildings to the scale of the neighborhood and existing structures
- On-site or University parking adequate to meet the needs of residents and permitting requirements, and parking for housing management staff; parking areas should be safe and secure with lighting that exceeds code, and should incorporate other security measures to include fencing, electronic access, etc.
- Landscaping and hardscape to promote outdoor social and recreational activities
- Availability and capacity of utilities
- Emergency access/egress and service access

Development of the site must accommodate a minimum of 76 beds and provide an inviting, complimentary building for the campus. It should provide components as noted in Section 2.3.2. The size and cost of the building must be balanced to allow for operations consistent with existing price points.

### 2.3.4 Security

Safety is a paramount concern for the Project and it is expected that the Project will be constructed taking into highest consideration all student safety issues. Specifically, the Project shall include the following enhancements:

- Professionally staffed and secure 24-hour front desk with panic button to county/city police
- Card access at exterior entries and crucial doorways throughout the building
• Fire exits alarmed and electro-magnetically secured and monitored remotely
• Emergency power provision for resident security in case of a utility power failure
• CCTV cameras at all entries, lobby area, shared laundry areas, each elevator and all other critical areas

2.3.5 Sustainable Development Strategies

The Foundation views the Project as an opportunity to mirror UW-FDL’s commitment to environmentally responsible design and construction, while balancing such values with economic constraints. Accordingly, the Developer shall demonstrate support of UW-FDL’s programs in these areas. As an example, the design and construction may consider the following opportunities:

• Storm-water management that includes rain gardens, minimized hardscape, and preserved open spaces to mitigate storm water on site
• Native landscaping materials, shade trees, organic garden, none requiring irrigation
• Mitigation of light pollution through intentional lighting strategies
• Maximized day-lighting and views
• High efficiency plumbing and electrical fixtures
• Passive solar domestic hot water system
• Sub-floor radiant heat
• Construction waste management plan
• Recycled and locally manufactured materials
• Occupancy/daylight sensors
• Recycling and composting areas
• Maximum energy efficiency

3 TERMS AND CONDITIONS

3.1 General Provisions

3.1.1 Revisions to the RFP

The Foundation may modify this RFP prior to the date fixed for submission thereof by issuance of an addendum or addenda to all parties who have received a copy of the RFP. The Foundation may extend the deadline for Proposal submission if, in the Foundation’s judgment, the revisions make this necessary.

Written inquiries concerning this RFP will be submitted to the Foundation by the date specified in Section 4.3 herein. Responses to inquiries will be made in writing and provided to all parties. The Foundation, in its sole discretion, may decline to answer any Respondent’s inquiries.

3.1.2 Cancellation of the RFP

The Foundation may cancel this solicitation, in whole or in part, or reject all Proposals submitted in response to this RFP when this action is determined to be in the best interest of the Foundation.

3.1.3 Acceptance of Submittals

The Foundation reserves the right to accept or reject any or all responses to this RFP, in whole or in part, received as a result of this RFP; to waive minor irregularities; or to negotiate with all Respondents, in any manner necessary, to serve the best interest of the Foundation and the University. Further, the Foundation reserves the right to make a whole award, multiple awards, a partial award, or no award at all. Nothing in this RFP shall be interpreted or construed as creating any contractual relationship, agency, or
partnership between the Respondent and the Foundation, the University, or Fond du Lac County.

3.1.4 Incurred Expenses
Any costs incurred by the Respondent in preparing and submitting a response to this RFP will be the sole responsibility of the Respondent and will not be reimbursed.

3.1.5 Economy of Preparations
Responses should provide a straightforward, concise description of the Respondent's ability to fulfill the requirements of this solicitation.

3.1.6 Discrepancies and Clarifications
The Foundation reserves the right to request clarification of any aspect of received responses or to request additional information that might be required to evaluate the response(s). Responses that are incomplete, conditioned, or not in conformity with this RFP may be rejected.

3.1.7 Respondent's Responsibilities
The Respondent is responsible for thoroughly reading the RFP and the terms and conditions contained therein. No pleas of ignorance on the part of the Respondent will be accepted by the Foundation. Each Respondent is solely responsible for the accuracy and completeness of its response.

The Respondent will be required to bring to the attention of the Foundation expressly, in writing, any substitution, or change proposed to this RFP and the resulting contract documents. The Foundation will not be bound to a substitution or change unless the Respondent expressly brings it to the Foundation's attention, in writing, and the Foundation expressly approves the substitution or change, in writing. The Foundation reserves the right to reject any requested substitutions or change.

3.1.8 Confidentiality of Proposals
Written requests for confidentiality may be submitted, but if so then shall be submitted with the response. The request must state specifically what elements of the response are to be considered confidential and/or proprietary. Confidential and proprietary information must be readily identified, marked and separated/package from the rest of the response. Co-mingling of confidential and proprietary information and other information is unacceptable. Neither a response, in its entirety, nor response price information will be considered confidential and proprietary.

3.1.9 Ethics in Contracting/Collusion
Respondent will certify in its response that its response is made without collusion or fraud and that the Respondent has not offered or received any kickbacks or inducements from any other Respondent, supplier, manufacturer, or subcontractor in connection with their response, and that Respondent has not conferred on any trustee, officer, or employee of the University or Foundation, past or present, any payment, loan, subscription, advance deposit, travel services or items even of nominal value, present or promised.

3.1.10 Release of Information and Advertising
The successful Respondent will not, without the prior written consent of the Foundation: (a) make any news release, public announcement, denial or confirmation of all or any part of the subject matter of this RFP or any resulting agreement, or any phase of any program hereunder; or (b) in any manner advertise
or publish the fact that the Foundation has entered into a contract, or is a customer of the successful Respondent.

3.1.11 Nondiscrimination

UW-Fond du Lac and the Foundation support the principles of equal opportunity and will not discriminate because of gender, race, color, national origin, religion, sexual orientation, age or disability in the selection of firms.

3.2 Insurance Requirements

The Respondent will, at its own expense, procure and maintain during the entire performance period of any contract or agreement resultant from the RFP process as outlined in this Section 4, including any extensions thereof, insurance of at least the kind set forth below in the minimum amounts specified below.

- Comprehensive General Liability insurance including completed operations and contractual liability in an amount of not less than $10 million per occurrence and name the Foundation and the University as an additional insured.
- Professional Liability insurance (Error and Omissions) covering the design services under the agreement in an amount not less than $1 million per occurrence and $2 million in the aggregate.
- Builders’ Risk insurance including all standard coverage specifically providing coverage for exposed buildings and structures.
- Comprehensive Automobile insurance in an amount of not less than $1 million per occurrence, which will cover all autos, owned and non-owned, hired and leased.
- Workers’ Compensation and Employers Liability—statutory requirements for all occupational injuries, illness, and disease.

All insurance coverage will be written by companies licensed or authorized to do business in the State of Wisconsin and having an A.M. Best rating of A or better. All polices, except Workers’ Compensation, will provide a 30-day notice for cancellation, and shall name the Foundation and the University as additional insured. Certificates of Insurance evidencing coverage will be provided to the Foundation prior to the awarding of any contract.

3.3 Terms of Agreement

The terms of the Development Agreement will be negotiated with the successful Respondent; however, the following terms require inclusion in the final agreement:

- Agreement by any financier, bank, or other potential lienholder that Fond du Lac County shall have first right of refusal to purchase any or all facilities executed under the terms of the agreement, should the chosen Respondent cease operations, become insolvent, or otherwise abandon the agreement;
- Agreement by any financier, bank, or other potential lienholder that the UW-FDL and/or Fond du Lac County shall have the right to determine and/or approve alternative uses of the facility as available and appropriate (e.g. summer camps/clinics), approve a different vendor to provide residence life program services, etc. should the chosen Respondent cease operations, become insolvent, or otherwise abandon the Agreement;
- Length and conditions of land-lease agreement with ultimate ownership of the building(s) vesting in the property owners;
- Possible options to purchase building(s) during the term of the agreement at a designated point or throughout the term of the agreement;
- Financial terms will include a payment to Fond du Lac County of $1000/acre annually, and other potential terms including but not limited to: a fixed-rate lease; possibility of payments in lieu of
taxes; defined applicable taxes on the buildings/improvements; as well as how taxes will effect pricing and structure of the project; and/or other terms as negotiated.

3.3.1 Negotiations
After Foundation selection and approval of a Developer, the Developer must enter into an agreement with Fond du Lac County within forty-five (45) days. If the selected Developer fails to reach agreement with Fond du Lac County within the forty-five (45) day negotiation period, the Foundation shall have the exclusive right to extend the time frame, cancel further negotiations, or begin negotiations with other developers.

3.3.2 General
**Performance Benchmarks:** All contracts and agreements will contain time and performance benchmarks, including construction deadlines, as appropriate, with clear termination provisions.

**Indemnification:** The successful Respondent and its agents, partners, employees and consultants (‘Indemnitors’) shall defend, indemnify and hold harmless the Foundation, the Foundation officers, directors, employees and agents, the University of Wisconsin and the State of Wisconsin and their officers, employees and agents from and against all liability, loss, damage, liens, causes of action, suits, judgments, cost, and expense, including all attorneys’ fees, and all claims, suits, and demands therefore, arising out of or resulting from the performance of services or any part thereof, the acts or omissions of the Indemnitors, or sub-contractors under any agreement with the Foundation.

**Insurance:** The Respondent will provide proof of insurance at levels acceptable to the Foundation prior to the signing of a Development Agreement. Other insurance may be required from time to time in such amounts as may be determined by the Foundation for coverage against other insurable risks relating to performance.

3.3.3 Design and Construction
**Assurances:** All contracts and agreements will include provisions for liquidated damages, performance bonds, or other remedies to assure timely completion of each Project. Prior to commencement of construction, the Respondent must demonstrate that it has the resources in hand or available to complete the project.

**Design Standards:** Improvements shall be designed to comply with Foundation and City of Fond du Lac design standards.

**Off-site and On-Site Costs:** All off-site and on-site preparation costs will be at the sole cost and expense of the Respondent. All residential and ancillary buildings, circulation, and landscaping for this Project are to be located within the Project site.

**Construction Schedule:** The Project shall be fully completed and ready for occupancy no later than June 1, 2016.

4 SELECTION PROCESS

4.1 Overview
Selection of the successful Respondent will be based on the professional qualifications of the Respondent’s team and their experience with a range of project types and financing. The Foundation has chosen a “best value” selection process that will consider both qualitative and quantitative criteria. The
Foundation has chosen the “best value” selection process combined with “design-build-operate by developer” delivery strategy for the following reasons:

- The Foundation has not yet developed a definitive program or specifications for the Project, preferring to work with an experienced development team to accomplish this task.
- The process must be able to accommodate the recommendations of the advisory committee and the final selection by the selection committee.
- The Foundation wants to assign the risk of planning, design, regulatory approvals, construction, and financing to a single legal entity (the Developer).

Time is of the essence for the selection of the Developer and the delivery of the Project by June 1, 2016. To be successful, the Developer must be experienced in this type of project delivery method. In particular, the Foundation seeks teams that have:

- Management capabilities and current experience standard to the design-build industry
- Knowledge of the full range of real estate development activities including financing, land acquisition, entitlements, and transaction structuring
- Solid relationships with the architect and contractor on the team as demonstrated by successful experiences on prior projects.

### 4.2 Pre-Qualification and Selection Committee

The UW-FDL Foundation Executive Director and UW-FDL Assistant Dean for Administration/Finance will pre-qualify all proposals received by the deadline. Pre-qualification will include: (1) evaluate the experience of the respondents, (2) determine that teams have met the minimum qualifications established in Section 4.5 Minimum Qualifications, (3) assess the financial and organizational skill of each respondent, and (4) forward finalists to Selection Committee for full review, presentations, and selection.

Those pre-qualified proposals will be invited for oral presentations and fully evaluated by the Student Housing Selection Committee (“SHSC”) which shall be comprised of:

- Four members of the UW-FDL Foundation Board;
- Executive Director of the UW-FDL Foundation;
- Chair (or designee) of Fond du Lac County UW-Ext, Education, Agriculture & Recreation Committee;
- The Director of Administration of Fond du Lac County;
- The County Executive of Fond du Lac County;
- The UW-FDL Campus Executive Officer/Dean;
- The UW-FDL Assistant Campus Dean of Administration and Finance;
- The UW-FDL Assistant Campus Dean of Student Affairs (or designee);
- The UW-FDL Student Government Association President (or designee); and
- The UW Colleges Vice Chancellor of Administrative and Financial Services (or designee).

In making the final selection, the SHSC will consider:

- Qualifications of the Developer’s team, including its record for arranging financing for other projects and the experience of specific team members
- Financing experience, financial strength, and funding concepts
- Alignment of rent rates with feasibility study, as well as proposed uses during vacant months
- Involvement of UW-FDL campus and FDL County leadership in initial project and on-going student housing operations, management structure for on-going operations, and experience in student life programming
- Minimum requirements and the selection criteria more fully described in Sections 4.5 Minimum Qualification and 4.6 Evaluation of Proposals.
4.3 Schedule
The Foundation expects to adhere to the following schedule in the selection process through project turnover:

- RFP announcement: June 30, 2015
- Mandatory proposer’s pre-proposal conference: July 20, 2015, 9:00-11:00 a.m.
- Deadline for submission of questions (must be in writing): July 27, 2015, 4:30 p.m.
- Deadline for submission of proposals: August 7, 2015, 4:30 p.m.
- Finalists notified: August 14, 2015
- Finalists oral presentations: August 24, 2015, 9 a.m.–3 p.m. (specific presentation times TBA)
- Contract negotiations: September 4 – October 31, 2015
- Successful Respondent presented to Fond du Lac County Board: TBD
- Pre-Design Phase (Part A): TBD (3-6 months)
- Design-Build Phase (Part B): TBD (6-12 months)
- Project Commissioning: June 1, 2016

This schedule is subject to modification at the sole and absolute discretion of the Foundation. For specific instructions relative to the Schedule, refer to the following sections.

4.4 Process Requirements
A mandatory pre-proposal conference will be held on July 20, 2015, from 9:00-11:00 a.m. The purpose of this conference is to orient respondents to the RFP and the UW-FDL campus. The conference will include a briefing and tour of the potential site. The conference will begin in room A-219 at UW-FDL, 400 University Dr. in Fond du Lac.

4.4.2 Inquiries
Inquiries concerning this RFP must be received in writing via standard mail or by email, by a representative of the Respondent, prior to the date specified in Section 4.3. An inquiry received by email or mail by the deadline will be deemed timely.

Except as specifically permitted in this section, from the date of this RFP until a final agreement is executed and the selection is announced, Respondents are not permitted to communicate for any reason with any University or Foundation representative or consultant except through:

Vice President
UW-Fond du Lac Foundation
RE: Student Housing RFP Inquiry
400 University Dr.
Fond du Lac, WI 54935
fdlhousing@gmail.com

In the event of a violation of this provision, the Foundation reserves the right to reject the proposal of the offending Respondent. Only questions that are in writing will be accepted. In addition, only responses issued in writing will be binding on the Foundation.
4.4.3 Written Addenda
Response to inquiries will be made in writing and provided to Respondents via email. The Foundation may decline to answer any Respondent’s inquiries. The Foundation may modify this RFP, prior to the date fixed for submission of the proposals, by issuance of an addendum or addenda to all parties who have received a copy of the RFP.

4.4.4 Format of Proposals
Proposals must be submitted in the format outlined in Section 5 of this RFP, with each of the described divisions completed in full. Each proposal will be reviewed to determine if it is complete prior to actual evaluation and those individuals pre-qualifying proposals and/or the SHSC reserves the right to eliminate from further consideration any proposal deemed to be substantially or materially non-responsive to the requests for information contained herein.

A proposal may be considered non-responsive if it includes extraneous information not specifically requested in this RFP. The clarity and conciseness of responses will be valued over sheer volume.

Each division and exhibit described below must be indexed, tabbed, and presented on a separately numbered page. If a Respondent fails to provide all categories of information required in this RFP, the Respondent may be disqualified from further award consideration. However, the Foundation reserves the right in its sole discretion to waive minor irregularities.

4.4.5 Submission of Proposals
One (1) original and thirteen (13) copies of all proposals must be received no later than the due date and time set forth in Section 4.3 of this RFP unless amended pursuant to Section 4.4.3. The deadline for submission of RFPs may be extended if, in the sole judgment of the Foundation, such extension is warranted. Proposals should be addressed to:

Vice President
UW-Fond du Lac Foundation
RE: Student Housing Proposal
400 University Dr.
Fond du Lac, WI 54935

The entire proposal must be in a sealed package. The name and address of the Respondent will appear on the outside of the package and the package will refer to “Request for Proposal”. All addenda to the RFP must be signed and returned with the proposal.

Each Respondent is solely responsible for the timely delivery of its proposal by the deadline for submission. The Foundation will not be responsible for lack of timely delivery of a proposal regardless of reason. Failure to meet the deadline for submission of a proposal will result in rejection of the proposal.

4.4.6 Oral Presentations
An oral presentation may be required of select Respondents submitting qualified proposals. The purposes of the oral presentations are as follows:
- To allow the Foundation to meet the Respondent’s key personnel and seek clarifications
- To allow the Respondent to discuss selected aspects of its proposal
At the time the oral presentations are scheduled, the Foundation will confirm by email contact with each Respondent the specifics of these sessions.
4.4.7 Final Ranking and Selection
The Foundation may negotiate with all Respondent finalists before selecting an apparent successful Respondent. The selection of an apparent successful Respondent does not necessarily mean the Foundation accepts all aspects of the Respondent’s Proposal.

After the initial selection of an apparent successful Respondent, should the Foundation fail to reach an agreement as to all points of the agreement, the Foundation may reject the Proposal, consider other Proposals, or undertake such other actions as deemed to be in the best interest of the University.

4.5 Minimum Qualifications
The Developer’s team shall meet the following minimum requirements. Failure to do so will result in the rejection of the submission and the removal of the Respondent from further consideration.

**Developer:** The developer shall have successfully financed and completed a range of projects for student housing of at least 76 beds.

**Architect:** The architect shall be licensed to do business in the State of Wisconsin and have designed a range of student housing and mixed use projects.

**Contractor:** The contractor shall be licensed to do business in the State of Wisconsin and have constructed a range of projects including student housing.

4.6 Evaluation of Proposals
The Foundation will perform a pre-qualification screening of the Proposals submitted by the deadline set forth in Section 4.3 to determine compliance with the administrative requirements set forth in Section 3 and the minimum qualifications set forth in Section 4.5. Proposals that do not meet these requirements will be removed from further consideration.

Following the initial pre-qualification screening, the SHSC will receive confirmation of the conforming proposals and review those recommended for final consideration. Full proposals from finalists will be forwarded to the SHSC for oral presentations and a complete review of the proposal.

4.6.1 Project Approach
The Respondent’s approach will be evaluated based on the following criteria.

**Pre-Design and Design/Build:**
- Previous development and delivery of “turn-key” student residential facilities
- Demonstration of an ability to guide planning and programming for student residential development in cooperation with an institution of higher education
- Experience with institutions of higher education, local and/or state government in the development, review and approval of the concept design and associated construction documents
- Demonstration of an ability to arrange financing; experience in successfully financing previous projects
- Demonstration of a coordinated approach to the scope of work for the design and construction phases of the projects including the ability to:
  - manage architects/professional-services firms in designing student residence life facilities
  - organize functional teams and use a coordinated approach to the scope of work
- Involvement of the Foundation, the University, and Fond du Lac County in the review and approval of concept design and development of the construction documents
• Sensitivity to the issue of maximizing the value of the project by balancing the needs of the students (e.g., affordability, amenities, privacy) with the financial feasibility of the project (e.g., quality of construction, program)
• Demonstration of ability to adhere to the project schedule for both the design and construction phases
• Demonstration of ability to include local suppliers, subcontractors, and labor in the construction phase
• Commitment to incorporating sustainable design concepts (e.g. LEED certification, Green Building Initiative Green Globe practices, etc.) into student residential facilities

Ongoing Management of Operations:
• Proposed methods for maximizing and sustaining the value of the project to both UW-FDL, the Foundation, and the Respondent, by balancing the needs of the University with the financial viability of the project
• Understanding modern residence life concepts and theories and ability to apply them from the project outset
• Comprehensive operations management of student residence facilities (e.g. maintenance, security, emergency response, etc.)
• Planning and executing student residential life programs in conjunction with, and complementary to, existing programs at UW-FDL
• Proposed organizational structure to include collaborative efforts with the University and a description of facilities staff including qualifications and experience in residence life
• Description of any potential scholarship(s) awards for UW-FDL students

4.6.2 Developer Qualifications
The qualifications of the developer will be evaluated based on the following criteria:
• Business expertise and management experience in developments involving student housing projects
• Organization of the Developer’s team and interrelationship between entities if more than one firm is involved; prior experience of firms as team members in a design-build approach to project delivery
• Financial soundness of the developer
• Experience of Developer in the delivery of turnkey and residential projects
• Ability to arrange for financing and flexibility of terms and process for financing

4.6.3 Design Team Qualifications
The qualifications of the architect and other members of the design team will be evaluated based on the following criteria.
• Availability of professional staff and their qualifications and experience.
• Experience of the architect on student housing projects, including both new construction and renovation
• Demonstrated LEED certification experience for residential facilities
• Financial soundness
• Ability of the architect to provide required insurance coverage

4.6.4 Contractor Qualifications
The qualifications of the contractor will be evaluated based on the following criteria.
• Availability of professional staff and their qualifications and experience
• Experience of the contractor on student housing and mixed use projects, including both new
construction and renovation
- Financial soundness
- Ability of contractor to provide required insurance coverage and bonding capacity

4.6.5 Project Site
The response must address the requirements of section 2.3.3 and include the best value and potential for sustained operational success at an attainable price point for the existing market.

5 SUBMISSION REQUIREMENTS

5.1 Organization of Response
The response shall be submitted in three-ring loose leaf notebooks and organized as follows:
- Cover Letter (with primary contact person clearly noted)
- Table of Contents
- Executive Summary
- Project Approach
- Developer Qualifications
- Design Team Qualifications
- Contractor Qualifications
- Project Site and Evaluation

5.2 Cover Letter
A transmittal letter prepared on the Respondent's business stationery must accompany each response. An individual authorized to bind the firm to all statements, including all services contained in the response, must sign the letter and provide contact information.

5.3 Table of Contents
The proposal shall have a Table of Contents that conforms to the organization set forth in Section 5.1.

5.4 Executive Summary
Respondents must provide a one-two page summary of the proposal.

5.5 Project Approach
5.5.1 Team Organization
An overview discussion of the Respondent's proposed approach to development is requested in order to ascertain the team’s general expertise and capability to deliver Projects.

Submit a brief overview of the Respondent's approach to developing Projects. The summary should not exceed three (3) pages and should address the following topics:
- A demonstration of an understanding of delivering student housing projects in conjunction with an institution of higher education
- An overview of the Respondent's organization and the entity or entities that will be responsible for the work
- A summary of the Respondent's basic experiences and attributes that set it apart from other candidates, including prior projects on which team members have worked together. The Respondent shall also provide a letter or memorandum of understanding signed by all team
members identified that:
  o Describes the proposed structure of Respondent's team
  o Identifies the person (including contact information) authorized to represent the team in all communications and negotiations
  o Certifies that all parties are willing and able to provide the services set forth in the RFP.

5.5.2 Development
Describe the Respondent's approach to performing all components set forth in Section 2.0 and necessary for the planning, design, construction, financing, and on-going management of the operation of the project. The description should include a discussion of the methodology to be used by the Respondent for seeking Foundation, University, and Fond du Lac County input and periodic approvals of its work. The following issues are of particular interest to the University:

- Site analysis and entitlements
- Program development
- Foundation review and approval opportunities during design
- Budget and pro forma development and control
- Trade-off or approaches to value engineering
- Schedule control during design and construction
- Construction management
- On-going operations of facility including: staffing, residence life programming, safety/security, and anticipated working relationship between UW-FDL and Respondent

5.5.3 Schedule
Demonstrate the Respondent's capacity to meet the Project delivery date set forth in Section 4.3. Provide a schedule for achievement of all major Project milestones for a project that meets the June 1, 2016 deadline, including the following:

- Start and finish of pre-design planning
- Start and finish of architectural and engineering design
- Procurement of all entitlements, permits, licenses, and approvals
- Start and finish of site development
- Start and finish of building construction, and
- Commissioning of the facility

5.6 Developer Qualifications

5.6.1 Personnel
Provide resumes and references for personnel who will be representing the Developer on the project and who have provided technical skills on projects similar to that required in this Request. The qualifications of the Developer should also address the capability and the experience necessary to secure construction financing and applicability of related tax-exempt financing, if determined to be needed for the Project.

5.6.2 Projects
Provide a list of projects of similar size and scope completed by the Developer. For each project, provide the following information:

- Project name
• Description of project including size and number of units or beds
• Picture of project, if available
• Total development budget and final cost
• Scheduled opening date and actual opening date
• References with telephone numbers

5.6.3 Financial Data
Provide the following financial information for the Developer:
• Most recent financial statement available (identify whether audited or un-audited) including balance sheet and income statement, including notes
• List of bank and accounting references
• Statement from insurance/surety brokers indicating that the requisite bonds and insurance can be secured for the Project

5.6.4 Claims, Law Suits or Defaults
Provide a list of any outstanding claims, lawsuits, or defaults on the part of the Respondent or any of its subsidiaries.

5.6.5 Tax-Exempt Financing
Provide information on experience in providing construction financing and tax-exempt financing and the availability of such financing for the proposed Project.

5.7 Design Team Qualifications
5.7.1 Personnel
Provide resumes and references for personnel who will be representing the architect and its sub-consultants on the first Project who have provided technical skills on student housing and mixed use projects.

5.7.2 Projects
Provide a list of at least three student housing projects of 76 plus beds completed by the architect. For each project, provide the following:
• Project name
• Description of project including size and number of units or beds
• Picture of project, if available
• Total development budget and final cost
• Scheduled opening date and actual opening date
• References with telephone numbers

5.7.3 Financial Data
Provide the following financial information for the architect:
• Most recent financial statement available (identify whether audited or un-audited) including balance sheet and income statement, including notes
• List of bank and accounting references
• Proof of insurance in accordance with applicable requirements of Section 3.2
5.7.4 Claims, Law Suits or Defaults
Provide a list of any outstanding claims, lawsuits, or defaults on the part of the architect or any of its subsidiaries.

5.8 Contractor Qualifications

5.8.1 Personnel
Provide resumes and references for personnel representing the contractor on the Project and who have provided technical skills on projects similar to that required in this Request.

5.8.2 Projects
Provide a list of at least three projects of similar size and scope completed by the contractor. For each project, provide the following information:

- Project name
- Description of project including size and number of units or beds
- Picture of project, if available
- Total development budget and final cost
- Scheduled opening date and actual opening date
- References with telephone numbers

5.8.3 Financial Data
Provide the following financial information for the contractor:

- Most recent financial statement available (identify whether audited or un-audited) including balance sheet and income statement, including notes
- List of bank and accounting references
- Proof of bonding capacity (payment and performance) for projects
- Proof of insurance in accordance with applicable requirements of Section 3.2.

5.8.4 Claims, Law Suits or Defaults
Provide a list of any outstanding claims, lawsuits, or defaults on the part of the contractor or any of its subsidiaries.

5.9 Project Site and Evaluation

5.9.1 Site Description
Provide a description of the development and how it meets the following requirements:

- Meets the defined need of providing student housing and student living space
- Integrates into the campus and community landscape and provides an inviting entrance to the campus
- Fits into the existing campus infrastructure
- Provides a design that can be operationally sustainable

5.9.2 Program Evaluation
Describe measures that will be used to ensure project completion on time and within budget. Provide examples of previous projects and success in measuring these critical factors.