Request for Qualifications (RFQ)
Student Housing Development Services

ISSUED BY:
ROWAN UNIVERSITY
NOTICE TO PROPOSERS
For Student Housing Development Qualifications
On Rowan University’s Glassboro Campus

Rowan University ("Rowan" or the "University") is soliciting requests for qualifications for developers to design, build, finance, operate and maintain ("DBFOM") student residential facilities on its main Glassboro Campus, as further specified herein. Interested parties should submit responses within the framework of this Request for Qualifications ("RFQ") process. Any questions concerning this RFQ should be directed in writing via email to Robert Yufer, Office of Contracting & Procurement, Rowan University: bids@rowan.edu.

Rowan is soliciting qualifications for a Public Private Partnership Agreement between the successful Proposer and Rowan University pursuant to N.J.S.A. 18A:64-85. It is expected that Proposers will develop this Project under a Project Labor Agreement as required by N.J.S.A. 18A:64-85 (d) (1).

Responses to this RFQ must be received by Rowan no later than 2:00 p.m. on December 18, 2018. Proposals that are not received by this due date and time may be rejected. Please view the “Submission Instructions” section on the corresponding RFQ Document for details on submitting RFQs.


This RFQ contains statements, descriptions, and analyses of Rowan and other project background information. Such statements, descriptions, and analyses are for informational purposes only. Rowan does not guarantee, represent, or warrant the completeness or accuracy of such information. All respondents to the RFQ should complete their own due diligence with respect to such information.
Table of Contents

1. Introduction and Description of the Proposal Process
   1.1. Project Description
   1.2. Overview of the Project
   1.3. Overview of the Selection Process
   1.4. Selection Committee

2. Project Goals
   2.1. Institutional Goals
   2.2. Residential Life Goals
   2.3. Transaction Goals
   2.4. Operations and Maintenance Goals

3. Submission Requirements
   3.1. Proposal Format
   3.2. Submittal Instructions

4. Evaluation Criteria
   4.1. Evaluation Process Overview
   4.2. Responsiveness
   4.3. Pass/Fail Review
   4.4. Evaluation Criteria

5. Disclaimers
I. Introduction

1.1 Project Description

Rowan University seeks to replace and update its existing housing portfolio to align unit types with the demands of the student population it serves. The intention is to engage in a public-private partnership ("P3") to design, build, finance, operate, and maintain ("DBFOM") new residential communities that will replace old residential facilities as well as residential facilities that are targeted to be repurposed to address other University space needs. The total replacement program targets approximately 1,269 beds.

Rowan University is issuing this RFQ to solicit responses from interested parties ("Developer" or "Developers") to enter into a public-private partnership ("P3") to design, build, finance, operate, and maintain ("DBFOM") a new residential community (the "Project") as follows:

- Up to 525 beds of new student replacement housing in unit-types that are targeted to house first-year and upper-class students. The beds will be developed on the site of up to (4) existing residence halls, which will require demolition and site remediation. The project envisions demolition to occur in phases to ensure that the current number of beds is always maintained and be operational by the fall of 2021.
- Other projects may follow for the remaining 744 beds dependent on other market factors. The proposal should include an option (Phase 2) for an additional multi-phase approach to build the remaining 744 beds in subsequent phases at the University’s option, based on market conditions.

The proposal submittals should address both the scenarios described above. A summary of the Project is provided below.

1.2 Project Overview

- **Description:** University intends to enter into a P3 Agreement with an experienced developer of student housing to DBFOM student residences on campus-owned land.
- **Location:** Housing must be located within the campus core within the site area designated in the attached exhibits. Four (4) existing residence halls currently occupy this land, and up to (4) will require demolition to be included within the scope of work. The halls targeted to be demolished are Willow, Magnolia, Chestnut, and Triad.
- **Program:** The first phase will consist of approximately 525 beds in unit-type(s) deemed appropriate for first- and second-year students. Other phased projects may follow for the remaining 744 beds dependent on other market factors.
- **Target Market:** The first phase will be targeted towards first-year and upper class students. Subsequent phases may serve first-year or continuing students pending further market and demand evaluation.
- **Rental Rates:** Affordability is a high priority, and rental rates charged for the new Project must be consistent with current on-campus rates. The Developer will identify any premiums that might be required, including potential limits relative to year over year increases.
- **Developer Responsibilities:** Design, Build, Finance, Operate, Maintain
- **University Responsibilities:** The University will retain the responsibilities of room assignments, billings and collections, marketing, student life staffing and programming,
- **Occupancy Risk:** Rowan will not provide any occupancy guarantees.
- **Reversion Rights:** At the end of the partnership agreement, it is required that the ownership of the Project’s physical facilities will revert to the University.
1.3 Overview of the Selection Process

The University desires to select a Developer that demonstrates excellent qualifications, experience, financial capacity, and a proven track record of executing similar projects in an expedient, efficient, and effective process that will provide the University the greatest value to its students. The University has, therefore, formulated the following selection process.

**Step 1: Proposals.** Based on a review of all received proposals, the University will establish a shortlist of three to five (3-5) Developers that it will solicit Request for Proposals from. It is anticipated that the RFP will be issued on or about December 20, 2018.

Developers shall not contact any officials of the University, the Selection Committee, the Department of Residential Learning and University Housing, or advisors of the University with regard to this opportunity, other than to submit emailed questions to Robert Yufer, Office of Contract & Procurement, Rowan University: bids@rowan.edu

Developers are advised that unauthorized contact with officials, related parties, or advisors of the University shall result in disqualification of a respondent from the RFQ process.

The University may, at its sole and absolute discretion, amend or modify the terms and provisions hereof and may abandon the procurement if determines to be in the best interest of the University. The University reserves the right to reject any or all proposals, to terminate this process, and to reinitiate the process in part and or in whole in the future.

1.4 Selection Committee

The Project selection process will be facilitated by a Selection Committee, consisting of representatives from various divisions within Rowan’s administration. The Committee will be responsible for making final recommendations to Rowan’s leadership on all major decisions relating to the Project. The Committee includes:

- Chief Financial Officer / Senior Vice President, Division of Finance
- Senior Vice President, Division of Student Affairs
- Vice President, Facilities, Planning & Operations
- Assistant Vice President, Planning & Operations
- Assistant Vice President of Financial Planning, Division of Finance
- General Counsel, Office of General Counsel
2. **Project Goals**

2.1. **Institutional Goals**

Rowan is committed to quality and rational growth in all of its endeavors. This includes a variety of academic and student life projects in the pipeline. Rowan has chosen to undertake the student housing Project in order to support a number of institutional goals and objectives.

1. Replace older residence halls with deferred maintenance backlogs.
2. Reconfigure the unit mix to better satisfy demand.
3. Enhance the first-year experience and continuing student living experience.
4. Boost recruitment and retention.
5. Align the quality and consistency of student housing with Rowan’s high institutional standards.

2.2. **Residential Life Goals**

Rowan recognizes the benefits of the residential experience for student success. Housing plays a vital role in building campus community and accelerating personal development. The expectation is that housing will continue to positively impact student experience, and those who live in the new residence halls will:

- Develop a greater sense of belonging;
- Find it easier to form friendships;
- Participate more in student organizations;
- Develop stronger connections to faculty;
- Increase their awareness of diversity; and
- Are more likely to complete a degree in four years.

Although Rowan will retain responsibility for managing the residential life programs within the new residence halls, the physical facilities must also support a student experience that is seamless with the Rowan brand and promotes the goals listed above.

2.3. **Transaction Goals**

The University is interested in exploring various transaction structures and funding mechanisms for the development and operation of the Project within the context of a P3 Agreement. Potential financing structures may range from 100% debt to 100% equity models. Rowan maintains the following objectives in relation to the development and management of the Project:

- **Project Financing**: Rowan expects the Preferred Developer to take leadership in ensuring the Project is fully financed, and that financing is secured on time according to the Project schedule.
Design and Construction: Rowan expects the Preferred Developer to assume responsibility for managing the design team and the construction manager. However, it is critical for the Preferred Developer to include the University in the design process and consult the University on logistical matters throughout construction.

Occupancy: Rowan is not willing to assume any risk relating to the occupancy of the Project.

Operations and Maintenance: Rowan expects the Preferred Developer to take leadership in the asset management decision-making process, which includes but is not limited to facility management oversight and efficiency, reserve utilization, and project reinvestment.

It is imperative that all proposed transaction structures maintain rental rate affordability and have a minimal impact on the University’s credit and balance sheet.

2.4. Operations and Maintenance Goals

The University expects that the Preferred Developer will be responsible for maintenance and upkeep of the Project and its contiguous grounds. The Preferred Developer will provide a level of service that is consistent with the University’s standards for quality and timeliness. It is expected that each respondent’s financial pro forma is constructed to accommodate the University’s standard level of service. A description of the tasks and level of service expected can be found as an exhibit to this document.

It is also imperative that the design and operation of the new residence halls demonstrate the University’s commitment to sustainability. Rowan will work closely with the Preferred Developer to ensure sustainability is a central consideration throughout the life of the partnership.

During the proposal verification period, Rowan will work with the Preferred Developer to establish a system of Key Performance Indicators, linking the partner’s compensation directly to project performance.

While the Preferred Developer will provide services related to the physical operations and maintenance of the new facilities, Rowan anticipates a central role in administrative and programming of residence life matters. Rowan’s responsibilities shall include room assignments, billings, collections, marketing, and residential programming services. Therefore, these duties will not be included in the operations delivery approach provided by the partner in response to this RFQ. The University will be compensated (from the Project’s revenues) for providing these services.
3. Submission Requirements

3.1. Proposal Format

The following constitutes the University’s submittal requirements for the RFQ responses. The RFQ responses must follow the order provided below to facilitate the University’s evaluation process. In addition, responses should be submitted in a binder and include tabs correlating to each of the following criteria numbers below. It is critical that responses are provided in a consistent format to ensure accuracy in the University’s review process. The requested organization and format of the submission is provided below:

- Cover Page
- Cover Letter
- Executive Summary
- Table of Contents
- Proposal
  - Tab 1: Acknowledgements
  - Tab 2: Team Profile
  - Tab 3: Relevant Experience
  - Tab 4: Required Procurement Documents
  - Tab 5: Resumes of Key personnel

Details on the requirements for each tab are outlined below:

**Tab 1: Acknowledgements**
Developers are required to submit a signature page that acknowledges the receipt, review, and understanding of all materials provided in this RFQ, including information included in exhibits and addenda. With this signature page, it will be assumed that the Developers are fully aware of all information that may impact design, program, and financial assumptions included in the RFQ submission. Failure to provide this signature page may result in non-compliance with the submission materials, this impacting that University’s ability to review the proposal.

**Tab 2: Team Profile**
Provide a description of the Developer, team structure, and overviews of participating firms. Include in the description the functional responsibilities of each team member, organizational structure of the relationship, and legal agreements between various parties. For each discipline, provide in the description key team members specific to the following roles, and resumes for those that will be involved in the Project. At a minimum, the following entities should be identified:
For each of these entities, provide the following information:

- Name of firm
- Primary point of contact for each firm (name, title, telephone number, and e-mail address)
- Key personnel to be assigned to the Project
- Resumes of Key personnel should be included and attached as Tab 5
- Firm Profile
  - Firm history
  - Organizational chart
  - Service offerings
  - Experience with student housing (list name of Projects and contact information for a reference at the Institution)
  - Financial Condition (required only for the prime development firm and the construction manager or general contractor)
    - Income statement
    - Balance sheet
    - Statement of cash flows (last three years)
    - Involvement in on-going litigation

The entities identified above are those currently being considered to participate with the Developer as subcontractors. Any additions to or changes to the subcontractors in connection with a response are subject to review and approval by the University. If a Developer does not name other entities, then the response will be evaluated assuming that the Developer will self-perform all functions and any later decision to include other entities in any of these roles will also require review and approval of these entities prior to their use by the Developer.
The University encourages and values the use of local- / New Jersey-based and minority- and women-owned firms as sub-contractors to complete this Project. Consideration and weight will be given to Proposers who indicate minority and women owned firms as part of their development team.

**Tab 3: Relevant Experience**

All Proposers shall have developed and constructed a minimum of four Housing projects in the last ten (10) years of the same or similar scope and size as the type contemplated herein. Any Architect, Construction Manager and/or Contractor shall be required to have performed a minimum of four (4) Housing projects in the last ten (10) years of the same or similar scope and size as the type contemplated herein.

Provide an overview of the prime development firm’s housing portfolio, as well as that of the architect, construction manager or general contractor, and operator and include:

- **Number of beds by category:**
  - On-Campus Housing
  - Off-Campus Housing

- **Number of beds by category:**
  - New Construction
  - Acquisition (if applicable)

- **Number of beds by development scenario:**
  - Developer owned (land and buildings)
  - Developer owned with ground lease
  - University affiliated non-profit with ground lease
  - University owned (land and buildings)

Provide detailed profiles of four (4) to six (6) recent comparable projects, which are preferably projects developed within the past ten years. Ensure that the respondent and all team members are represented in at least one project and highlight any projects that were completed by multiple team members. For each comparable project, specify how it relates to the proposed Project at Rowan as outlined in this RFQ. Examples should include the following information:

- Brief project description
- Project location and owner
- Project status (in progress or complete)
- Project student type (first year students, sophomores, etc.)
RFQ 19-33
Student Housing Development Services

- Project unit type (traditional, semi-suite, apartment, etc.)
- Project size (bed count, gross square footage, construction costs, and total project cost)
- Original project schedule, actual completed project schedule, and reasons for variance
- Transaction, finance, and legal structure
- Operations and management structure
- Name, email address, and telephone number of primary University administrator contact with knowledge of the Project

**Tab 4: Resumes of Key professionals**

**Tab 5: Resumes of Key Personnel**

3.2. **Submittal Instructions**

Proposals must be submitted by **December 18, 2018 at 2:00pm (Eastern Time)**. Please review the “Submission Information” section of the corresponding RFQ Document for details.

Proposals that are not received by the date and time set forth above shall be rejected.

All proposals shall have an index and tabbed sections identifying the criteria established in this RFQ.

All Proposals submitted will remain unopened until the deadline for submission of the Qualifications has passed. At such time, all Proposals received will be opened and distributed to the Project Team for review.

The delivery of the Proposal to Rowan on the above date and prior to the time specified herein is solely and strictly the responsibility of the Proposer. Rowan shall not, under any circumstances, be responsible for delays caused by any occurrence.

The Proposer, by submitting a Proposal, attests to the fact that neither the Proposer nor any of its proposed sub-contractors are prohibited from receiving the award under **N.J.S.A. 34:11-56.38** (regarding State of New Jersey list of debarred contractors and sub-contractors).
Submissions must be in a tabbed binder and not exceed 75 single-sided pages, including pictures, charts, graphs, tables, and text that the Developer deems appropriate to be part of the review of the response. Resumes of key personnel along with the cover letter, table of contents, front and back covers, blank section/numerical dividers, conceptual drawings, and Required Procurement Documents outlined in Section 5.3 will not be counted in the 75-page limit. No supplemental information to the 75-page submission will be allowed.
4. **Evaluation Criteria**

4.1. **Evaluation Process Overview**

The purpose of this RFQ is to allow Developers to provide a detailed proposal in a format that allows the University to facilitate a fair evaluation of each submission. The University’s evaluation of each RFQ response will be based upon the information provided, additional information requested by the University, and information obtained from references and independent sources. Any information a Developer deems essential to the evaluation of the services offered, for which no provision is made in the RFQ, should be clearly stated in the response. While the University reserves the right to request additional information or clarification from Developers at any time in the process, Developers should not assume that they will be allowed to amplify or modify their initial written proposal. The initial response must be a clear explanation of the services and benefits offered and should include information as to how all specifications will be met.

4.2. **Responsiveness**

Each proposal will be reviewed for (a) the responsiveness of the Developer to the requirements set forth in this RFQ and (b) conformance to the RFQ instructions regarding organization and form. Those proposals not responsive to this RFQ may be excluded from further consideration and the Developer will be notified. The Selection Committee may also exclude from consideration any Developer whose proposal contains a material misrepresentation.

4.3. **Pass/Fail Review**

Following or in conjunction with evaluation of each proposal for responsiveness, the Selection Committee will evaluate each proposal based upon pass/fail criteria, deemed by inclusion of the following Required Procurement Documents:

4.4. **Evaluation Criteria**

Rowan desires to develop a list of potential P3 Partners from which to solicit Request for Proposals, who, in its sole discretion, demonstrate the ability to serve as a high-quality partner to the University, advance the University’s strategic priorities, and provide a transaction with competitive terms. Some of the key evaluation criteria shall include, but not be limited to, the following:
Project Experience

- Experience of the Developer in executing student housing or similar public-private partnerships as referred to in this RFQ;
- Experience of the subcontractors/partners/affiliates in delivering student housing or similar public-private partnerships as referred to in this RFQ;
- Experience of the Developer and subcontractors in executing public-private partnerships together; and,
- Experience of the Developer and subcontractors in delivering student or similar housing projects in the State of New Jersey.

The selection of a Preferred Developer will be based on a points-earned matrix derived from a service evaluation, in which the Selection Committee will use to rank Developers:

<table>
<thead>
<tr>
<th>Scoring Category</th>
<th>Points</th>
</tr>
</thead>
<tbody>
<tr>
<td>Projects and Relevant Experience</td>
<td>0 - 70</td>
</tr>
<tr>
<td>Composition of Team</td>
<td>0 - 30</td>
</tr>
</tbody>
</table>
5. **Disclaimers**

Rowan reserves the right to seek clarifications concerning any submission at any time, and failure to respond may be cause for rejection. Clarification is not an opportunity to change the submission. Rowan will endeavor to accord all firms fair and equal treatment with respect to the RFQ process. Submissions may be deemed non-responsive for failing to submit documentation that addresses each element of this RFQ, and any submission so deemed by Rowan in its discretion will not be further considered.

Submission confers on a firm no right to a determination that it is qualified, and a determination that a firm is qualified confers no right to an award or to a subsequent agreement. This process is for Rowan’s benefit only and is to provide Rowan with competitive information to assist in its selection process. All decisions on compliance, evaluation, terms and conditions shall be made solely at Rowan’s discretion and made to favor Rowan.

Any representations or statements made within this RFQ shall not be considered a contractual obligation by Rowan University and the respondents shall not be entitled to rely upon them. The Selection Committee reserves the right to reject any and all submissions and to identify and select the respondents which the Committee, in its sole and absolute discretion, deems most qualified.

Respondents shall be solely and totally responsible for all costs associated with responding to this RFQ, and the University accepts no responsibility with regard thereto. Submissions will become the property of Rowan.

The University reserves all rights available to it by law in administering this RFQ, including without limitation, the right, in its sole discretion, to:

- Reject any or all submissions at any time;
- Terminate evaluation of any or all submissions at any time;
- Suspend, discontinue and/or terminate negotiations with any respondent at any time;
- Accept and review a nonconforming submission;
- Request or obtain clarifications, revisions or additional information from any source;
- Issue addenda to and/or cancel this RFQ;
- Issue a new request for qualifications;
- Decline to financially participate in a proposed Project;
- Extend any deadline or time and waive or permit the correction of minor deficiencies or irregularities in a submission and minor or technical violations of this RFQ;
- Change the scope and the range of services from what is defined in this RFQ at any time; and
Each respondent, by submitting qualifications, thereby accepts all risk of adverse public notice, damages, financial loss, criticism or embarrassment that may result from any disclosure or publication of any material or information required or requested by the Selection Committee in connection with the submission of its Proposal. In submitting a Proposal, the respondent expressly waives, on behalf of itself, its partners, joint venture members, officers, employees and agents, any claim against any of the University, and their respective officers and employees, for any damages that may arise therefrom.

Any and all information the Selection Committee makes available to respondents shall be as a convenience to the respondent and without representation or warranty of any kind.

By submitting a proposal, the Developer certifies that no relationship exists between the Developer and the University that interferes with fair competition or is a conflict of interest; and no relationship exists between such Developer and another person or firm that constitutes a conflict of interest that is adverse to the University.

Once the partnership commences, it will be required of the Selected Developers to notify Rowan of any material changes in its organization, financial condition, key personnel, or legal actions that could affect the performance of the development team.
NOTE:

WHEN AN ADDENDUM IS ISSUED, THE ACKNOWLEDGMENT MUST BE INCLUDED IN THE PROPOSAL AT THE TIME OF SUBMITTAL. FAILURE TO DO SO WILL RESULT IN IMMEDIATE PROPOSAL REJECTION.

BUSINESS REGISTRATION CERTIFICATE
NEW JERSEY BUSINESS REGISTRATION REQUIREMENTS - CONSTRUCTION

All New Jersey and out of state business organizations must obtain a Business Registration Certificate (BRC) from the Department of Treasury, Division of Revenue, prior to conducting business in the State of New Jersey. Proof of valid business registration with the Division of Revenue, Department of Treasury, State of New Jersey, must be submitted for the contractor and any designated subcontractors (N.J.S.A. 40A:11-16, including plumbing, HVAC, electrical and structural steel). No contract will be awarded without proof of business registration with the Division of Revenue. The contract will contain provisions in compliance with N.J.S.A. 52:32-44, as amended, outlined below.

The contractor shall provide written notice to its subcontractors and suppliers of the responsibility to submit proof of business registration to the contractor. The requirement of proof of business registration extends down through all levels (tiers) of the Project.

Before final payment of the contract is made by the contracting agency, the contractor shall submit an accurate list and proof of business registration of each subcontractor or supplier used in the fulfillment of the contract, or shall attest that no subcontractors were used.

For the term of the contract, the contractor and each of its affiliates and each subcontractor and each of its affiliates (N.J.S.A. 52:32-44(g)(3)) shall collect and remit to the Director, New Jersey Division of Taxation, the use tax due pursuant to the “Sales and Use Tax Act” (N.J.S.A. 54:32 B-1 et seq.) on all sales of tangible personal property delivered into this state.

A business organization that fails to provide a copy of a registration as required pursuant to section 1 of P.L. 2001, c.134 (N.J.S.A. 52:32-44 et seq.) or subsection e. of section 92 of P.L. 1977, c.110 (N.J.S.A. 5:12-92), or that provides false business registration information under the requirements of either of those sections, shall be liable for a penalty of $25.00 for each day of violation, not to exceed $50,000.00 for each business registration copy not properly provided under a contract with a contracting agency. A sample Business Registration Certificate is attached. Other forms, such as a Certificate of Authority to collect Sales and Use Taxes or a Certificate of Employee Information Report Approval, are not acceptable.

Any questions in this regard can be directed to the Division of Revenue at (609) 292-1730.
THESE ARE SAMPLES OF BUSINESS REGISTRATION CERTIFICATES.