

**REQUEST FOR QUALIFICATIONS
FOR DEVELOPER
FOR
STUDENT APARTMENT PROJECT**

**TEXAS STATE UNIVERSITY
ROUND ROCK, TEXAS**

RFQ No.:

758-18-09082

Submission Due Date:

July 23, 2018 - 12:00 p.m. (C.D.T.)

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SECTION 1 – GENERAL INFORMATION & REQUIREMENTS

- 1.1 **GENERAL INFORMATION:** The Texas State University System (“Owner”) and **Texas State University** (“University”) are soliciting Statements of Qualifications (“SOQs” or “Qualifications”) from vendors, developers, and engineering/construction management companies (“Respondent”) that describe their capabilities to design, build, finance, operate and maintain a **Student Apartment Project** (Project) serving primarily students from the **Texas State University Round Rock Campus, on the University’s Round Rock campus** at 1555 University Blvd, Round Rock, Texas, in accordance with the terms, conditions, and requirements set forth in this Request for Qualifications (“RFQ”). If availability remains, preference would be given to students from the Austin Community College: Round Rock Campus, the Texas A&M Health Science Center - Round Rock, and then to faculty and staff.

This Project is to be a Private/Public Partnership (“P3”), which utilizes an arrangement with no initial capital cost outlay required of the University. **The University is open to a variety of P3 business models and deal structures.**

The Owner intends to enter into one or more long-term contracts that govern the operations, finances, design standards, tenancy criteria and contractual obligations within the Agreement. The Developer will provide the financing for the Project and will operate the proposed facilities using the cash flow derived from the Project. The primary goal of the Project is to enable the University to further its goals and mission with regards to excellence in education, to promote the success of all students, and to provide the necessary services, resources, and infrastructure to support the university’s strategic direction, along with other goals included in Section 3 of this RFQ.

Subject to practical concerns, Texas State aspires to have the Project substantially completed and ready for occupancy by fall 2020 with ownership of all structures reverting to the University no later than at the end of the lease term. The proposed site plan is located as Attachments 1,2 and 3 of this RFQ. The Owner is interested in selecting a firm that has direct experience in developing, designing, building, financing and operating projects similar to the Project, and delivering a Project that meets the goals, standards and performance requirements and schedule outlined in Section 3 of this RFQ. The procurement process is outlined below:

- 1.1.1 Collecting SOQs in response to this RFQ is the first step in selecting a firm. This RFQ provides the information necessary for Respondents to prepare and submit SOQs for consideration by the University.
- 1.1.2 The Owner may select up to four (4) of the qualified Respondents to participate in interviews with the Selection Committee to confirm and clarify the qualifications submitted and to answer additional questions. Select Shortlisted Respondents may be selected to proceed to the next procurement phase.
- 1.1.3 The next step is to issue an RFP and conduct interviews with all Shortlisted Respondents,

pursuant to which the Owner anticipates selecting one (1) of the Shortlisted Respondents to be the Preferred Bidder for final award of a contract. The Owner will negotiate the final contract terms and conditions with the Preferred Bidder.

- 1.2 **PUBLIC INFORMATION:** All information, documentation, and other materials submitted in response to this solicitation are considered non-confidential and/or non-proprietary and are subject to public disclosure under the Texas Public Information Act (Texas Government Code, Chapter 552.001, et seq.) after the solicitation is completed. The Owner and University strictly comply with all statutes, court decisions, and opinions of the Texas Attorney General with respect to disclosure of RFQ information. If awarded a contract, the firm is required to make any information created or exchanged with the State pursuant to the contract, and not otherwise excepted from disclosure under the Texas Public Information Act, available in a format that is accessible by the public at no additional charge to the State.
- 1.3 **TYPE OF CONTRACT:** Any contract resulting from this solicitation will be in a form acceptable to the Owner.
- 1.4 **CLARIFICATIONS AND INTERPRETATIONS:** Any clarifications or interpretations of this RFQ that materially affect or change its requirements will be posted by the Owner as an addendum on the Electronic State Business Daily (“ESBD”) at the website indicated in Section 1.4.1 below. It is the responsibility of all Respondents to obtain this information in a timely manner. All such addenda issued by the Owner before the proposals are due as part of the RFQ, and Respondents shall acknowledge receipt of and incorporate each addendum in its Qualifications. Respondents shall consider only those clarifications and interpretations that the University issues by addenda five (5) days prior to the submittal deadline. Interpretations or clarifications in any other form, including oral statements, will not be binding on the University and should not be relied on in preparing Qualifications.
 - 1.4.1 **ADDENDA AND AWARD INFORMATION WILL BE ISSUED BY THE TEXAS STATE UNIVERSITY SYSTEM FOR THIS RFQ VIA THE ELECTRONIC BUSINESS DAILY WEBSITE AT: [HTTP://ESBD.CPA.STATE.TX.US](http://esbd.cpa.state.tx.us). REFERENCE THE RFQ NUMBER PROVIDED ON THE COVER PAGE. IT IS THE RESPONSIBILITY OF THE RESPONDENT TO CHECK THE ESBD WEBSITE REGULARLY FOR ANY POSTED ADDENDUMS.**
- 1.5 **QUESTIONS:** Respondents shall restrict all contact with Owner and University staff and direct all questions regarding this RFQ, including questions regarding terms and conditions, in writing to the Point of Contact (See Section 1.7).
 - 1.5.1 Point-of-Contact must receive all questions and concerns not later than the date specified in the schedule table in Section 3.4.
 - 1.5.2 The Owner must have a reasonable amount of time to respond to questions or concerns.
 - 1.5.3 It is the Owner’s intent to respond to all appropriate questions and concerns; however, the Owner reserves the right to decline to respond to any question or concern.
- 1.6 **SUBMISSION OF QUALIFICATIONS:**
 - 1.6.1 **DEADLINE AND LOCATION:** The University will receive Qualifications for this RFQ at the time and location described below:

July 23, 2018 by 12:00 p.m. (C.D.T)

Ms. Nancy Nusbaum
Associate Vice President for Finance and Support Services Planning
Texas State University
601 University Dr.
San Marcos, TX 78666
512-245-2244
nnusbaum@txstate.edu

- 1.6.2 Submit one (1) original and five (5) identical copies of the Qualifications plus two (2) digital copies in a read only format on a flash drive. An original signature must be included on the “Execution of Offer” (See Section 4.6) document submitted with each hard copy. An electronic signature or scan of an original signature must be included on all digital copies.
- 1.6.3 The Owner will not acknowledge or consider Qualifications that are delivered by telephone, facsimile (fax), or electronic mail (e-mail).
- 1.6.4 Properly submitted Qualifications will not be returned to Respondents.
- 1.6.5 Qualification must be enclosed in a sealed envelope (box or container) addressed to the Point-of-Contact person (Section 1.6.1); the package must clearly identify the submittal deadline, the RFQ number, and the name, email address of the person for RFQ notification, and return address of the Respondent.
- 1.6.6 If Qualifications are sent by courier or mail, Respondents are cautioned to allow sufficient time for delivery prior to the published deadline to the location specified in this RFQ. **It is the Respondent’s sole responsibility for preparing, submitting and delivering their qualifications to the designated location on or before the published submittal deadline.**
- 1.7 **POINT-OF-CONTACT:** The Owner designates the following person as its representative and Point-of-Contact for this RFQ. Respondents shall restrict all contact with the Owner and direct all questions regarding this RFQ, including questions regarding terms and conditions and technical specifications, to the Point-of-Contact person, via email only.
- Ms. Nancy Nusbaum
Associate Vice President for Finance and Support Services Planning
Texas State University
601 University Dr.
San Marcos, TX 78666
512-245-2244
Email: nnusbaum@txstate.edu
- 1.8 **EVALUATION OF QUALIFICATIONS:** The evaluation of the Qualifications shall be based on the requirements described in Section 6 of this RFQ. All properly submitted Qualifications will be reviewed, evaluated, and ranked by a Selection Committee. The Selection Committee will include representation from The Texas State University System office and University representatives. The top-ranked Respondents may be selected by the Owner for further consideration by participating

in an interview wherein qualifications will be presented and examined in further detail and where questions will be posed by the Selection Committee and answered by the Respondent.

1.8.1 Qualifications submittals are not required to include any information regarding Respondent's proposed fees, pricing, or other compensation considerations as these will not be a factor in the selection of the best qualified firm(s).

- 1.9 OWNER'S RESERVATION OF RIGHTS: The Owner may evaluate the Qualifications based on the anticipated completion of all or any portion of the Project. The Owner reserves the right to divide the Project into multiple parts, to reject any and all Qualifications and re-solicit for new Qualifications, or to reject any and all submissions and temporarily or permanently abandon the Project. The Owner makes no representations, written or oral, that it will enter into any form of agreement with any Respondent to this RFQ for any project and no such representation is intended or should be construed by the issuance of this RFQ.
- 1.10 ACCEPTANCE OF EVALUATION METHODOLOGY: By submitting its Qualifications in response to this RFQ, Respondent accepts the evaluation process and acknowledges and accepts that determination of the "most qualified" firm(s) will require subjective judgments by the University.
- 1.11 NO REIMBURSEMENT FOR COSTS: Respondent acknowledges and accepts that any costs incurred from the Respondent's participation in this RFQ shall be at the sole risk and responsibility of the Respondent.
- 1.12 OPTIONAL PRE-SUBMISSION CONFERENCE: One **optional** Pre-Submission Conference will be scheduled for the following date and time:

June 12, 2018 – 9:30 a.m. (C.D.T.)

11th Floor, J.C. Kellam Building
Texas State University
601 University Drive
San Marcos, Texas 78666

It is recommended that the Respondent attend the Pre-Proposal Conference on the date listed above. The firm name on the sign-in sheet must match the Respondent name on the RFQ. The conference will be open to all potential members of the Project Team.

All Respondents should **email** the Point of Contact (see Section 1.7) confirming their attendance and number of representatives planning to attend, at least five business days prior, so that arrangements can be made in advance of the Pre-Proposal Conference.

- 1.13 ELIGIBLE RESPONDENTS: Only individual firms or lawfully formed business organizations may apply (This does not preclude a Respondent from using subcontractors or consultants). The Owner will contract only with the individual firm or formal organization that submits a Qualification.
- 1.14 CERTAIN PROPOSALS AND CONTRACTS PROHIBITED: Under Section 2155.004, Texas Government Code, a state agency may not accept a proposal or award a contract that includes proposed financial participation by a person who received compensation from the agency to

participate in preparing the specifications or request for proposals on which the proposal or contract is based. All vendors must certify their eligibility by acknowledging the following statement (noted in Section 4.8 of Execution of Offer), “Under Section 2155.004, Government Code, the vendor certifies that the individual or business entity named in this bid or contract is not ineligible to receive the specified contract and acknowledges that this contract may be terminated and payment withheld if this certification is inaccurate.” If a state agency determines that an individual or business entity holding a state contract was ineligible to have the contract accepted or awarded as described above, the state agency may immediately terminate the contract without further obligation to the vendor. This section does not create a cause of action to contest a proposal or award of a state contract.

- 1.15 **CERTIFICATION OF FRANCHISE TAX STATUS:** Respondents are advised that the successful Respondent will be required to submit certification of franchise tax status as required by State Law (H.B. 175, Acts 70th Leg. R.S., 1987, Ch. 283, p. 3242). The Respondent agrees that each subcontractor and supplier under contract will also provide a certification of franchise tax status. Vendor or applicant certifies that the individual or business entity named in this contract, bid, or application is not ineligible to receive the specified grant, loan, or payment and acknowledges that this contract may be terminated and payment may be withheld if this certification is inaccurate.
- 1.16 **STATE REGISTRATION OF ENGINEERING FIRMS:** Respondents are advised that the Texas Board of Professional Engineers requires that any entity providing engineering services to the public must register with the Texas Board of Professional Engineers. An entity is defined as a sole proprietorship, firm, partnership, corporation or joint stock association.
- 1.17 **STATE REGISTRATION OF ARCHITECTURAL FIRMS:** Respondents are advised that the Texas Board of Architectural Examiners requires that any entity (including architects, landscape architects and interior designers) providing architectural services (including architects, landscape architects and interior designers) to the public must register with the Texas Board of Architectural Examiners. An entity is defined as a sole proprietorship, firm, partnership, corporation or joint stock association.

SECTION 2 – DEFINITIONS

The following terms and acronyms are used within this RFQ:

DBFOM	Design, build, finance, operate and maintain
Developer	The contracting entity that will perform the Project Scope of Work as defined in the RFQ
Equity Member	An entity, who is part of the Developer organization, that provides equity financing to the Project
ESBD	Electronic state business daily website
Financially Responsible Party	Parent company or affiliate company (subsidiary, joint venture, etc.) associated with a member of the Project Team
GAAP	Generally accepted accounting principles
HUB	Historically underutilized business
IFRS	International financial reporting standards
Lead A/E Firm	Lead architecture and/or design engineering firm
Lead Contractor(s)	Contractor(s) in the Project Team who are responsible for procurement and oversight of construction and possibly Operation and Maintenance (“O&M”)

	functions
O&M	Operation and maintenance
Owner	Texas State University System or TSUS or System
PA	Project Agreement
PPP	Public Private Partnership (P3)
P3	Public Private Partnership (PPP)
Preferred Bidder	The entity selected as the preferred contracting entity via the RFP evaluation process
Prime Firm	The organization considered to be lead Respondent entity (if not a joint venture)
Project Facilities	The facilities operated by the Developer
Project Team	All key entities that comprise the Respondent organization
Respondent	The contracting organization/entity that submits the SOQ
RFQ	Request for Qualifications
RFP	Request for Proposals
SOQ	Statement of Qualifications
System	The Texas State University System or TSUS or Owner
T&C's	Terms and conditions
TAC	Texas Administrative Code
TSUS	Texas State University System or System or Owner
University	Texas State University

SECTION 3 – EXECUTIVE SUMMARY

3.1 **HISTORICAL BACKGROUND:** Texas State University is a member of The Texas State University System. Beginning in 1886, educators gathered to study and earn advanced certification at the Summer Normal Institute in San Marcos, Texas. Citizens of San Marcos, along with those who came to study, saw its promise as a site for a permanent Normal School to serve teachers in South Texas and in 1892, they petitioned the Texas Legislature for such a designation. Work on the Main Building began in 1902 and it was ready for 303 students and 17 faculty members when Southwest Texas State Normal School opened in 1903. Over the years, the Texas Legislature broadened the institution’s scope and changed its name several times until, finally, the institution became Texas State University in 2003.

In a little over 119 years, the University has advanced from a regional school for teacher training into one of the nation’s largest and most vibrant universities with nearly 39,000 students, 98 bachelor’s, 91 master's, and 13 doctoral degree programs, with additional degree programs planned over the next few years. For current information on Texas State University, please visit our website at <http://www.txstate.edu/about/index.html>.

In 2012, the University was designated as a Texas Emerging Research University. In 2016, the University climbed several categories in the Carnegie Classification of Institutions of Higher Education and is now considered a Doctoral Institution with Higher Research Activity. The Carnegie Classification has been the leading framework for recognizing and describing institutional diversity in U.S. higher education for the past four and a half decades.

The Texas State University Round Rock Campus opened the 117,000 square foot Avery Building in 2005 on the 101-acre property donated to the University by the Avery family. In 2010, Texas State opened the 77,740 square foot, Nursing Building and initiated a Bachelor of Science in Nursing program. Enrollment at the Round Rock Campus for the Fall 2017 semester totaled 1,586 students. Construction is currently underway on a 107,000 square foot Willow Hall, a health professions facility planned for opening in spring 2018 when three College of Health Professions

departments will move from San Marcos to the Round Rock Campus: Communication Disorders, Physical Therapy, and Respiratory Care accounting for approximately **500 additional full-time students a majority of which are upper classmen and graduate students**. The University's strategic priority is to position the Round Rock Campus to become a focal point for health professions education, while ensuring the community is served for high-demand disciplines and professions.

The Round Rock campus does not currently offer or have plans for on-site student housing or dining. The University believes the Project will support the fulfilment of its vision and enable the University to further its goals by enhancing the overall student experience. The Owner is exploring this Project utilizing a public-private partnership mechanism to move quickly to capture the current opportunity, to maximize the University's other resources for investment in academic expansion, and to leverage the creative problem-solving capacity of the marketplace.

Texas State's Round Rock campus also has prominent education component neighbors:

Austin Community College: Round Rock is a part of the Austin Community College system, a public, two-year college offering associate degrees and certifications in more than 180 areas with 11 distinct campuses, including the Round Rock campus that opened in 2010. Round Rock enrollment for the Spring 2017 totaled approximately 4,500 students.

Texas A&M Health Science Center – Round Rock opened the HSC Round Rock Building in 2009 in support of the Texas A&M College of Medicine and the Texas A&M College of Nursing providing third and fourth year students with clinical training. Enrollment for Fall 2017 totaled 164 students.

Seton Medical Center Williamson is a 181-bed teaching hospital with general medical and surgery, a part of the Seton Healthcare Family. The facility has the capacity to grow to more than 350 beds. Seton has a teaching component. Seton staff employed at the facility vary depending on various full time/part time and contractual relationships average between 600-700 personnel. Average full-time employee salaries are \$72,000.

The Texas State University System's AA2 credit rating reflects its credibility and stature within the higher education marketplace. The System's Financial Reports are available online at <http://www.tsus.edu/about-tsus/reports.html>

3.2 **MISSION STATEMENT:** The University is a doctoral granting, student-centered institution dedicated to excellence and innovation in teaching, research, including creative expression, and service. The University strives to create new knowledge, to embrace a diversity of people and ideas, to foster cultural and economic development, and to prepare graduates to participate fully and freely as citizens of Texas, the nation, and the world.

3.3 **PROJECT DESCRIPTION AND SCOPE:** Key background information for the Project and a description of the Scope of Work is provided below.

3.3.1 The University's goals for the Project are described below without any order of importance or preference:

- The Project will offer highly desirable, market-competitive apartments available for students attending classes on the Round Rock Campus.

- It is anticipated that the Project would have approximately 500 beds and apartments would include a mix of bedroom configurations.
- The addition of dynamic social spaces should be included to create a strong sense of community among the residents.
- The University aspires to have the Project substantially completed and ready for occupancy by Fall, 2020 or the earliest feasible date.
- The University is open to including retail/commercial and other types of space in the Project. Amenities and services currently on the Round Rock Campus include a deli, library, Physical Therapy Clinic, Speech-Language-Hearing Clinic, a Sleep Center, on-site university police force, and staff dedicated to keeping the facilities looking great and operating well.
- Adequate parking and other on-site quality-of-life offerings (e.g., meeting space, indoor recreation spaces, etc.) should be provided to fully support the residential needs of the occupants.
- The Respondent should leverage the creative problem-solving capacity of the marketplace; including, but not limited to design efficiencies and alternative technical concepts
- The Respondent will implement the Project as a P3 in accordance with the P3 Guidelines set by Owner, as found at <http://gato-docs.its.txstate.edu/jcr:c0a782c6-4767-49e2-b2ec-4c9f54b984a6/P3%20Process%20Guidelines.pdf>.

3.3.2 Round Rock Campus Proposed Site

The Round Rock Campus is a 101-acre University owned property. The University is open to discussing the optimal placement of the Project on the campus; however, a potential development site has been identified on a vacant parcel located on the southern end of the campus as shown in Attachment 1 hereto, a site with a moderate slope and expansive clay soil conditions. The potential development site was identified on the basis that it provides the best opportunity to introduce an architectural conversation with nearby campuses and accomplish an integrated living, learning component in the multi-campus area. The Project should include a strong pedestrian linkage back to the campus core. Exterior materials should be utilized that are complementary to existing campus facilities and design guidelines.

3.3.3 Project Status

Only high-level conceptual planning has occurred regarding the Project.

3.3.4 Scope of Work

3.3.4.1 Overview - The Respondent Scope of Work is to plan, finance, design, construct, and operate the Project.

3.3.4.2 Scope of Work Detail - The University intends to enter into one or more agreement(s) for the development, design, construction, finance, operation and maintenance of the Project. The anticipated payment concession structure will: (a) obligate Developer to (i) design and construct the Project according to agreed-upon specifications; (ii) invest and provide project financing; (iii) operate and maintain the Project and (iv) provide required reporting and customer service activities; and (b) grant Developer the right to receive lease payments according to the agreed-upon schedule for a number

of years to be determined after substantial completion of the Project (which will include, among other things, that the Project is available for use), under the terms and conditions specified by the Owner.

The Project will be subject to constraints, the most notable being:

- Residency preference in order of priority:
 - Texas State University students, faculty and staff;
 - Austin Community College – Round Rock and Health Science Center – Round Rock students;
 - The public

In terms of Project specifications, the anticipated Project scope to be included in the eventual RFP is preliminarily outlined below:

- The facility(ies) will need to provide apartments accommodating approximately 500 beds.
- The University is open to including retail/commercial space in the Project and invite creative Developer approaches to space use and revenue generating opportunities.
- The University is interested in maximizing flexibility of the Project to provide for future growth of residential and mixed-use space which enhances and supports the mission and objectives of the University.
- The Ground Lease will have a calculated rental amount as negotiated between the parties.
- Though different financial models will be considered, under the preferred scenario the Project will generate income for the University through a land lease and profit sharing. Rental rates for occupants will be market driven or as otherwise negotiated between the Parties.

3.3.4.3 Design, Construction and Commissioning - The Selected Respondent will be responsible for all aspects of the pre-development investigation and design of the Project. The Selected Respondent will also be responsible for construction and commissioning of the Project. The Owner envisions that the Project will generally utilize the University's design guidelines to be provided in the RFP. Though the Owner will not strict require adherence to these standards for this Project, it does expect that the design attempt to follow the spirit of the guidelines. As an example, University projects are designed to meet LEED Silver standards, but are not submitted for certification. The conclusion of the design phase is the development of a detailed set of plans and specifications for a specific student apartment solution that can be used to obtain construction pricing for the Project.

3.3.4.4 Financing - The Developer will be responsible for the formation of capital necessary to deliver the Project. The Owner does not have a preference for a specific financing structure. The Owner will evaluate a variety of transaction and funding structures for the Project; however, the financing will not encumber University property or assets and the respective current credit ratings of the Owner should not be adversely impacted by the terms and conditions of the Ground Lease or the planning, design, funding, construction, operation, and maintenance of the Project.

- 3.3.4.5 Operations and Maintenance - Subject to negotiation between the parties, it is Owner's preference that the Selected Respondent will be responsible for:
- (a) lifecycle maintenance, including capital refurbishment and replacement of the facilities and related infrastructure; and
 - (b) facilities management services, including the (i) operation, maintenance and repair of the facilities and associated infrastructure and maintenance and repair of certain furniture, fixtures and equipment, and (ii) possibly certain other services such as grounds maintenance and, parking as more particularly described in the RFP.
- 3.3.4.6 Billing/Customer Service - It is important to note the Owner prefers the Selected Respondent retains the responsibility for marketing, billings, and collections for the Project. The Selected Respondent will negotiate an appropriate means and mechanism for Project invoicing. The Selected Respondent will be responsible for providing a negotiated level of customer service, inclusive of response and resolution of issues raised by the tenants within a contractually agreed time.
- 3.3.4.7 Permitting - The Developer will be responsible for all permits, fees and approvals from authorities having jurisdiction for the contracted Project scope. The University will assist the Developer with all permit-related activities.
- 3.3.4.8 Reporting - The Selected Respondent will be responsible for providing all routine, periodic, and incident reporting as negotiated between the Owner and the Selected Respondent. For example, the Selected Respondent may be asked to facilitate collection of the following data as a condition of the Agreement, such data to be reported annually as aggregate outcomes:
- Number of Texas State student, faculty and staff residents;
 - Number of other priority residents;
 - Number of Texas State students on site either as student workers or interns;
 - Value of direct payroll; and
 - Value of gross income derived from the Project
- 3.3.4.9 Handback - At the end of the contract term, and if the contract term is not extended, the Selected Respondent will hand back the facilities to the Owner without consideration with a remaining life cycle as negotiated between Selected Respondent and Owner.

The Owner will require a termination for convenience clause in the Lease Agreement that will provide it with a mechanism to voluntarily terminate the Ground Lease should such an action become critical to its future operation. The terms of the termination rights will be established through the RFP and will be based upon terms that are commercially reasonable.

The Owner will require a termination in the case of default clause in the Lease Agreement that will provide it with a mechanism to terminate the Ground

Lease in an event of default. The terms of the termination clause will be established through the RFP and will be based upon terms that are commercially reasonable.

Performance Bonds will be required to ensure successful and timely completion of the Project.

The Owner will require contractual terms that will obligate its approval of any future assignments of the leases or agreements that result from the RFQ and RFP processes as well as prior approval of any financing related to the project.

3.3.5 Project Standards, Specifications and Performance

The RFP may also include further performance guidelines that are yet to be determined.

3.4 **PROJECT PLANNING SCHEDULE: Key Project planning schedule milestones are:**

System release RFQ	5/30/18
Optional Pre-submission Conference	6/12/18
Deadline for questions from Respondents	6/22/18
RFQ's Submitted	7/23/18
Interviews with RFQ Respondents	Week of 8/13/18
Finalist to receive RFP selected	8/21/18
RFP Released to finalists	8/31/18
Optional Pre-proposal Conference	9/14/18
Deadline for RFP questions	9/28/18
RFP responses due	10/26/18
Interviews of RFP respondents	November, 2018
Preferred Respondent selected	December, 2018
Contracts completed	March, 2019
Initial construction begun	April, 2019
Substantial completion and occupancy of Project	August, 2020

The schedule of events presented above represent a basic timeline. A final project timeline will be developed with the Owner at a later time.

SECTION 4 – REQUIREMENTS FOR STATEMENT OF QUALIFICATIONS (SOQ)

Respondents shall carefully read the information contained in the following criteria and submit complete SOQs responding to all questions in Section 4 formatted as directed in Section 5. Incomplete Qualifications will be considered non-responsive and are subject to rejection.

4.1 **CRITERION ONE: RESPONDENT’S STATEMENT OF QUALIFICATIONS AND AVAILABILITY TO UNDERTAKE THE PROJECT**

- 4.1.1 Provide a statement of interest for the Project including a narrative describing the brief history of and the unique qualifications of the Respondent (including the Prime Firm and other members of the Project Team) as they pertain to the Project.
- 4.1.2 Provide a statement on the availability and commitment of the Prime Firm and its principal(s) and professional team to undertake the Project.
- 4.1.3 Provide a graphic representation of the Project Team.

4.2 **CRITERION TWO: PRIME FIRM’S ABILITY TO PROVIDE SERVICES**

- 4.2.1 Provide the following information for the Prime Firm:
 - Legal name of the company as registered with the Secretary State of Texas, if applicable
 - Address of the office that will be providing services
 - Number of years in business
 - Type of Operation (Individual, Partnership, Corporation, Joint Venture, etc.)
 - Annual revenue totals for the past five (5) years
- 4.2.2 Is your company currently for sale or involved in any transaction to expand or to become acquired by another business entity? If yes, please explain the impact both in organizational and directional terms.
- 4.2.3 Provide any details of all past or pending litigation or claims filed against your company that would affect your company’s performance under a contract with the Owner.
- 4.2.4 Is your company currently in default on any loan agreement or financing agreement with any bank, financial institution, or other entity? If yes, specify date(s), details, circumstances, and prospects for resolution.
- 4.2.5 Does any family, business or financial relationship exist between your firm and any System or University employee, officer or Regent? If so, please explain.
- 4.2.6 Provide a claims history under professional malpractice insurance for the past five (5) years for the Prime Firm and any team members proposed to provide professional architectural or engineering services.

4.3 **CRITERION THREE: PROJECT TEAM’S ABILITY TO PROVIDE SERVICES**

- 4.3.1 Describe, in graphic or written form, the proposed Project assignments and lines of authority and communication for principals and key professional members of the team involved in the Project. Indicate the estimated percent of time these individuals will be involved in the Project for design and construction.
- 4.3.2 Provide resumes (limit one page each) giving the experience and expertise of the professional members for the Prime Firm, Lead Contractor(s), Lead A/E Firm and each key sub-contractor that will be involved in the Project, including their experience with similar projects, the number of years with the firm, and their city of residence.
- 4.3.3 Clearly identify the members of the proposed Project Team who worked on the listed projects in Criterion 4.4 and describe their roles in those projects.
- 4.3.4 Describe the basis for the selection of the Lead Contractor(s), Lead A/E Firm and proposed sub-contractors included in the Project Team and the role each will play for the Project.
- 4.3.5 Identify the Prime Firm's experience with the proposed Lead Contractor(s), Lead A/E Firm and sub-contractors in the past five years. Preference is given to Lead Contractor(s) and sub-contractors who have worked with the Prime Firm on previous projects that are presented as a part of 4.4.
- 4.3.6 Provide representative projects of the proposed Prime Firm, Lead Contractor(s), Lead A/E Firm and key sub-contractors in higher education or with governmental entities and describe how they will be beneficial to the delivery of the Project.

4.4 CRITERION FOUR: RESPONDENT'S PERFORMANCE ON PAST REPRESENTATIVE PROJECTS

- 4.4.1 List three to five (3-5) projects for which the Project Team have provided services that are most directly related to the Project. If possible, provide project examples that involve:
 - Design/construction of a primarily student apartment housing facility
 - Design/build delivery method
 - Operating & Maintenance expertise
 - Experience in university/public/commercial campus settings, specific examples of projects located within a university owned or affiliated campus should receive special attention
 - Financing
- 4.4.2 List the projects in order of priority, with the most relevant project listed first. Provide the following information for each project listed:
 - Project name, location, contract delivery method, and description
 - Color images (photographic or machine reproductions)
 - Final Construction Cost, including Change Orders
 - Final Project size in gross square feet;
 - Final Project power and thermal capacity
 - Type of construction (new, renovation, or expansion)
 - Actual start and finish dates for design

- Actual Notice to Proceed and Substantial Completion dates for construction
- Description of professional services Prime Firm and contractors provided for the project
- Name of Project Manager (individual responsible for the overall success of the project)
- Sources of funding/financing

4.4.3 References (for each project listed above, identify the following):

- The Owner's name and representative who served as the day-to-day liaison during the design and construction, and operation and maintenance phases of the Project, including telephone number and email address
- Contractor's name and representative who served as the day-to-day liaison during the pre-construction and/or construction phase of the project, including telephone number and email address
- Length of business relationship with the Owner

References shall be considered relevant based on specific project participation and experience with the Prime Firm. The Owner may contact references during any part of this process. The Owner reserves the right to contact any other references at any time during the RFQ process.

4.5 CRITERION FIVE: RESPONDENT'S KNOWLEDGE OF BEST PRACTICES

4.5.1 Describe the Project Team's design philosophy, design methodology, and its process for integrating institutional standards into design. Please include in the narrative how the design will make the best use of the site, the university affiliation, and the existing facilities on the Round Rock Campus.

4.5.2 Describe the Project Team's approach to construction, commissioning and start-up.

4.5.3 Describe your approach towards financing capital projects in the higher education or research industries in general, and the deliverability of that approach. Describe approach to allocating key project risks and providing financing for this particular project (including meeting budget restrictions), and how your approach will drive value for the Owner. In particular, based on experiences of design-build, DBFOM or similar P3 projects and of current market conditions, provide the following information:

4.5.3.1 Provide your proposed risk allocation between team members and with the Owner, identify potential Project-specific risks, and potential solutions (regardless of risk ownership) that may arise during the development, design, construction and operation of the Project.

4.5.3.2 Provide a conceptual plan that details how the Respondent intends to ensure an adequate level of commitment from potential finance providers, where relevant, for a timely and successful financial close. Include a list of anticipated timelines and milestones to obtain financial commitments and close a major project financing;

4.5.3.3 Provide an explanation of the Respondent's contingency plans should there be a gap in the financing or should any potential finance provider not be in a position to provide its share of the financing;

4.5.3.4 List any innovative financing transaction structures that will be used to submit a

competitive price or achieve added value for money to the Owner, including benchmarking and other efforts to ensure reduced financing costs; and

- 4.5.3.5 List any credit and budgetary issues that the Respondent has identified and any proposed innovative solutions.
- 4.5.3.6 Describe the proposed mechanisms through which all parties would be incentivized to achieve efficiencies and operational cost savings.
- 4.5.3.7 Finally, describe your proposed revenue sharing.

4.5.4 Describe your Project Team's demonstrated technical competence, use of industry best practices and management qualifications with similar projects, and creative approaches to problem solving particularly those for higher education institutions.

4.6 CRITERION SIX: RESPONDENT'S ABILITY TO IDENTIFY AND RESOLVE PROBLEMS ON PAST PROJECTS

- 4.6.1 Please identify the primary risks that the Project Team anticipates for the Project, categorized by Design, Construction and O&M, along with the Respondent's recommended mitigations for those risks.
- 4.6.2 Understanding schedule limitations, provide an analysis of the Project planning schedule and describe how you plan to develop and communicate design and scope in a manner that will help the Owner make timely and informed decisions.

4.7 CRITERION SEVEN: FINANCIAL REQUIREMENTS

4.7.1 Provide information regarding any material changes in financial condition for Project Team, including Prime Firm, Equity Member(s), Lead Contractor(s), Lead A/E Firm, key sub-contractor(s) and Financially Responsible Party or Parties for the foregoing (if any of the foregoing are a consortium, partnership or any other form of a joint venture, include information for all such members) the Project Team for the past three years and anticipated for the next reporting period.

4.7.2 Summarize the projects (maximum three (3) **additional** projects to the projects listed in Section 4.4) in which the Respondent has offered finance as part of a DBFOM or other concession or P3 solution.

Detail the Respondent's ability and demonstrated experience in:

- 4.7.2.1 Providing financing for similar projects within specified financial closing time parameters;
- 4.7.2.2 Providing financing for this Project by financial close;
- 4.7.2.3 Financing a project utilizing offtake agreements and availability payments.

4.7.3 Describe your approach towards financing capital projects in the higher education or student housing industries in general, and the deliverability of that approach. Describe approach to allocating key project risks and providing financing for this particular project (including meeting budget restrictions), and how your approach will drive value for the Owner. In particular, based on experiences of design-build, DBFOM or similar P3 projects and of current market conditions, provide the following information:

4.7.3.1 Provide your proposed risk allocation between team members and with the

Owner, identify potential Project-specific risks, and potential solutions (regardless of risk ownership) that may arise during the development, design, construction and operation of the Project.

- 4.7.3.2 Provide a conceptual plan that details how the Respondent intends to ensure an adequate level of commitment from potential finance providers, where relevant, for a timely and successful financial close. Include a list of anticipated timelines and milestones to obtain financial commitments and close a major project financing;
- 4.7.3.3 Provide an explanation of the Respondent's contingency plans should there be a gap in the financing or should any potential finance provider not be in a position to provide its share of the financing;
- 4.7.3.4 List any innovative financing transaction structures that will be used to submit a competitive price or achieve added value for money to the Owner, including benchmarking and other efforts to ensure reduced financing costs; and
- 4.7.3.5 List any credit and budgetary issues that the Respondent has identified and any proposed innovative solutions.
- 4.7.3.6 Describe the proposed mechanisms through which all parties would be incentivized to achieve efficiencies and operational cost savings.
- 4.7.3.7 Finally, describe your proposed revenue sharing.

4.8 CRITERION EIGHT: EXECUTION OF OFFER

NOTE TO RESPONDENTS: SUBMIT ENTIRE SECTION WITH RESPONSE.

THIS EXECUTION OF OFFER MUST BE COMPLETED, SIGNED, AND RETURNED WITH THE RESPONDENT'S QUALIFICATIONS. FAILURE TO COMPLETE, SIGN AND RETURN THIS EXECUTION OF OFFER WITH THE QUALIFICATIONS MAY RESULT IN REJECTION OF THE QUALIFICATIONS. SIGNING A FALSE STATEMENT MAY VOID THE SUBMITTED QUALIFICATIONS OR ANY AGREEMENTS OR OTHER CONTRACTUAL ARRANGEMENTS, WHICH MAY RESULT FROM THE SUBMISSION OF RESPONDENT'S QUALIFICATIONS, AND THE RESPONDENT MAY BE REMOVED FROM ALL PROPOSER LISTS. A FALSE CERTIFICATION SHALL BE DEEMED A MATERIAL BREACH OF CONTRACT AND, AT UNIVERSITY'S OPTION, MAY RESULT IN TERMINATION OF ANY RESULTING CONTRACT OR PURCHASE ORDER.

- 4.8.1 By signature hereon, Respondent acknowledges and agrees that (1) this RFQ is a solicitation for Qualifications and is not a contract or an offer to contract; (2) the submission of Qualifications by Respondent in response to this RFQ will not create a contract between the University and Respondent; (3) the University has made no representation or warranty, written or oral, that one or more contracts with the University will be awarded under this RFQ; and (4) Respondent shall bear, as its sole risk and responsibility, any cost which arises from Respondent's preparation of a response to this RFQ.
- 4.8.2 By signature hereon, Respondent offers and agrees to furnish to the University the products and/or services more particularly described in its Qualifications, and to comply with all terms, conditions and requirements set forth in the RFQ documents and contained herein.
- 4.8.3 By signature hereon, Respondent affirms that he has not given, nor intends to give

at any time hereafter, any economic opportunity, future employment, gift, loan, gratuity, special discount, trip, favor or service to a public servant in connection with the submitted Qualifications.

- 4.8.4 By signature hereon, Respondent that is a “taxable entity” under Section 171.0002 of the Texas Code certifies that it is not currently delinquent in the payment of any Franchise Taxes due under Chapter 171, Texas Tax Code, or that the corporate Respondent is exempt from the payment of such taxes, or that the corporate Respondent is an out-of-state corporation that is not subject to the Texas Franchise Tax, whichever is applicable.
- 4.8.5 By signature hereon, the Respondent hereby certifies that neither the Respondent nor the firm, corporation, partnership or University represented by the Respondent, nor anyone acting for such firm, corporation, or institution has violated the antitrust laws of this state, codified in Section 15.01, ET. seq., Texas Business and Commerce Code, or the Federal antitrust laws, nor communicated directly or indirectly the Qualifications made to any competitor or any other person engaged in such line of business.
- 4.8.6 By signature hereon, Respondent represents and warrants that:
 - 4.8.6.1 Respondent is a reputable company regularly engaged in providing products and/or services necessary to meet the terms, conditions and requirements of the RFQ to satisfactorily perform the terms, conditions and requirements of the RFQ;
 - 4.8.6.2 Respondent is aware of, is fully informed about, and is in full compliance with all applicable federal, state and local laws, rules, regulations and ordinances;
 - 4.8.6.3 Respondent, if selected by the University, will maintain insurance as required by the Contract;
 - 4.8.6.4 All statements, information and representations prepared and submitted in response to this RFQ are current, complete, true and accurate. Respondent acknowledges that the University will rely on such statements, information and representations in selecting the successful Respondent. If selected by the University as the successful Respondent, Respondent will notify the University immediately of any material change in any matters with regard to which Respondent has made a statement or representation or provided information.
- 4.8.7 By signature hereon, Respondent certifies that the individual signing this document and the documents made part of the RFQ is authorized to sign such documents on behalf of the company and to bind the company under any agreements or other contractual arrangements, which may result from the submission of Respondent’s Qualifications.
- 4.8.8 By signature hereon, Respondent certifies that if a Texas address is shown as the address of the Respondent, Respondent qualifies as a Texas Bidder as defined in Rule 34 TAC 20.32 (68).

4.8.9 By signature hereon, Respondent certifies as follows:

4.8.9.1 “Under Section 2155.004, *Texas Government Code*, the vendor or applicant certifies that the individual or business entity named in this bid or contract is not ineligible to receive the specified contract and acknowledges that this contract may be terminated and payment withheld if this certification is inaccurate.”

4.8.9.2 “Under Section 2254.004, *Texas Government Code*, the vendor or applicant certifies that each individual or business entity which is an engineer or architect proposed by Respondent as a member of its team was selected based on demonstrated competence and qualifications only.”

4.8.10 By signature hereon, Respondent certifies that no relationship, whether by relative, business associate, capital funding agreement or by any other such kinship exist between Respondent and an employee of any TSUS component, or Respondent has not been an employee of any TSUS component within the immediate twelve (12) months prior to your RFQ response. All such disclosures will be subject to administrative review and approval prior to the University entering into any contract with Respondent.

4.8.11 By signature hereon, Respondent affirms that no compensation has been received for participation in the preparation of the specifications for this RFQ. (ref. Section 2155.004 Texas Government Code).

4.8.12 By signature hereon, Respondent agrees that any payments that may become due under any agreements or other contractual arrangements, which may result from the submission of Respondent’s Qualifications, will be applied towards any debt including, but not limited to, delinquent taxes and child support that is owed to the State of Texas.

By signature hereon, Respondent certifies that no member of the Board of Regents of the TSUS, or the Executive Officers of the TSUS or its component institutions, has a financial interest, directly or indirectly, in the transaction that is the subject of the contract, and that no member of the TSUS Board of Regents has a “substantial interest” (as that term is defined in Section 51.923 of the Texas Education Code) in the Respondent.

(Execution of Offer continued on next page)

4.8.13 **Execution of Offer:** RFQ No. 758-18-09082 – RFQ for Developer for Student Apartment Project for Texas State University, Round Rock, Texas.

The Respondent must complete, sign and return this Execution of Offer as part of its submittal response. The Respondent’s company official(s) who are authorized to commit to such a submittal must sign submittals. Failure to sign and return this form will subject the submittal to disqualification.

Respondent’s Name: _____

Respondent’s State of Texas Tax Account No: _____
(This 11-digit number is mandatory)

If a Corporation: _____

Respondent’s State of Incorporation: _____

Respondent’s Charter No: _____

Identify by name, each person who owns at least 10% of the Respondent’s business entity:

(Name)

(Name)

(Name)

Submitted and Certified By:

(Respondent’s Name)

(Title)

(Street Address)

(Telephone Number)

(City, State, Zip Code)

(Fax Number)

(Authorized Signature)

(Email Address) for RFQ Notification

(Date)

4.8.14 **Acknowledgement of Addenda: Receipt is hereby acknowledged of the following addenda issued as part of this Solicitation (initial if any addenda were issued by the University).**

No. 1 _____ No. 2 _____ No. 3 _____ No. 4 _____ No. 5 _____

SECTION 5 – FORMAT FOR STATEMENT OF QUALIFICATIONS

5.1 GENERAL INSTRUCTIONS

- 5.1.1 The Statement of Qualifications shall be prepared SIMPLY AND ECONOMICALLY, providing a straightforward, CONCISE description of the Respondent's ability to meet the requirements of this RFQ. Emphasis shall be on the QUALITY, completeness, clarity of content, responsiveness to the requirements, and an understanding of University's needs.
- 5.1.2 The Statement of Qualifications shall be printed on letter size (8-1/2" x 11") paper and assembled with spiral-type bindings. **DO NOT USE METAL-RING HARD COVER BINDERS.**
- 5.1.3 The Statement of Qualifications shall include a Cover Page and a Table of Contents. Divider Tabs shall be used to separate and identify the response to each of the criteria listed in Section 4 of this RFQ. Number all pages of the submittal sequentially using Arabic numerals (1, 2, 3, etc.).
- 5.1.4 The Statement of Qualifications shall be a maximum of fifty (50) printed pages. Each printed side shall be considered one (1) page. The font size should be no smaller than 11-point, except for tables, which may be prepared using 10-point font. The cover, table of contents, divider sheets, resumes and Execution of Offer do not count as printed pages. However, resumes should be one-page per resume (maximum). Additional attachments shall NOT be included with the SOQs.
- 5.1.5 Incomplete Qualifications will be considered non-responsive and subject to rejection.
- 5.1.6 Qualifications and any other information submitted by Respondents in response to this RFQ shall become the property of the Owner.
- 5.1.7 The Owner will not compensate Respondents for any expenses incurred in Qualifications preparation or for any presentations that may be made, unless agreed to in writing in advance or required by law. Respondents submit Qualifications at their own risk and expense.
- 5.1.8 The Owner makes no representations of any kind that an award will be made as a result of this RFQ, or subsequent RFP. The Owner reserves the right to accept or reject any or all Qualifications, waive any formalities or minor technical inconsistencies, or delete any item/requirements from this RFQ when deemed to be in the Owner's best interest.
- 5.1.9 Qualifications shall consist of answers to questions identified in Section 4 of the RFQ. It is not necessary to repeat the question in the Qualifications; however, it is essential to reference the question number with the corresponding answer.

SECTION 6 – EVALUATION OF SOO AND SELECTION CRITERIA WEIGHTING

6.1 EVALUATION COMMITTEE

- 6.1.1 The Owner will identify a formal Evaluation Committee. This committee will score the SOQs using the pass/fail criteria described in 6.4 below.

6.2 EVALUATION OF SOQ

6.2.1 The Evaluation Committee will evaluate the SOQs submitted in response to this RFQ, based on the completeness of the information provided, and the business and technical merits related to the goals and requirements of the Owner. The Evaluation Committee will conduct a detailed review and evaluation of the Respondent and/or Project Team and all entities and/or organizations participating in providing the services described in this RFQ. The evaluation of proposals has two primary objectives: 1) to determine whether the Respondent meets the requirements set forth in this RFQ and 2) to determine whether the Respondent's past experience and approach to the Project will enable the Project to meet the Owner's goals. The Evaluation Committee will determine which firms will be interviewed. Interviews will be held at the discretion of the Owner.

6.3 RESPONSIVENESS

6.3.1 Each SOQ shall be reviewed for:

- a) the responsiveness of the respondent to the requirements set forth in this RFQ; and
- b) conformance to the RFQ instructions regarding organization and format.

Those SOQs deemed not responsive to this RFQ may be excluded from further consideration and the respondent will be notified. The Owner may also exclude from consideration any respondent whose submission contains a material misrepresentation.

6.4 PASS/FAIL REVIEW

6.4.1 Following or in conjunction with evaluation of each SOQ for responsiveness, The Owner shall evaluate each SOQ based upon the following pass/fail criteria. A Respondent must obtain a "pass" on all pass/fail items in order for its SOQ to progress to qualitative evaluation under Section 6.5.

6.4.1.1 Administrative/Legal

Respondents must satisfy the following pass/fail requirements:

- a) Signed Execution of Offer

6.4.1.2 Financial

Respondents must satisfy the following pass/fail requirements:

- b) Project Team has the financial capability to carry out the Project responsibilities potentially allocated to it as demonstrated by the materials provided in Section 4.7 of the RFQ.

6.4.1.3 Technical

- c) Respondent has the development, design, construction, operations, and maintenance capabilities and capacity to carry out the Project responsibilities.

6.5 QUALIFICATIONS EVALUATION CRITERIA AND WEIGHTING

6.5.1 The point distribution for the Technical portion of the evaluation (total of 100 points) is outlined below:

MAX Points	Criteria
10	1 – RESPONDENT’S STATEMENT OF QUALIFICATIONS AND AVAILABILITY TO UNDERTAKE THE PROJECT
20	2 – PRIME FIRM’S ABILITY TO PROVIDE THE SERVICES
20	3 – PROJECT TEAM’S ABILITY TO PROVIDE THE SERVICES
20	4 – RESPONDENT’S PERFORMANCE ON PAST REPRESENTATIVE PROJECTS
10	6 – RESPONDENT’S ABILITY TO IDENTIFY AND RESOLVE PROBLEMS ON PAST PROJECTS
20	7 – FINANCIAL REQUIREMENTS

6.6 CHANGES IN ORGANIZATION AND/OR PROJECT APPROACH

6.6.1 Changes in Respondent Organization

Subject to the limitations herein, the Owner may permit Shortlisted Respondents to add, delete or substitute team members and reorganize their teams during the procurement process unless the change results in actual or potential organizational conflicts of interest or renders Respondent Project Team, in the Owner’s sole determination, less qualified to develop the Project. Notwithstanding the foregoing, following submittal of the SOQs, the following actions may not be undertaken without the Owner’s prior written consent:

- (a) Deletion, substitution or change in composition of a Shortlisted Respondent Team Member identified in its SOQ or a change in the role or scope of work of a Team Member;
- (b) Deletion or substitution of personnel identified in Section 4.1 of SOQ or a change in the role or position of such personnel;

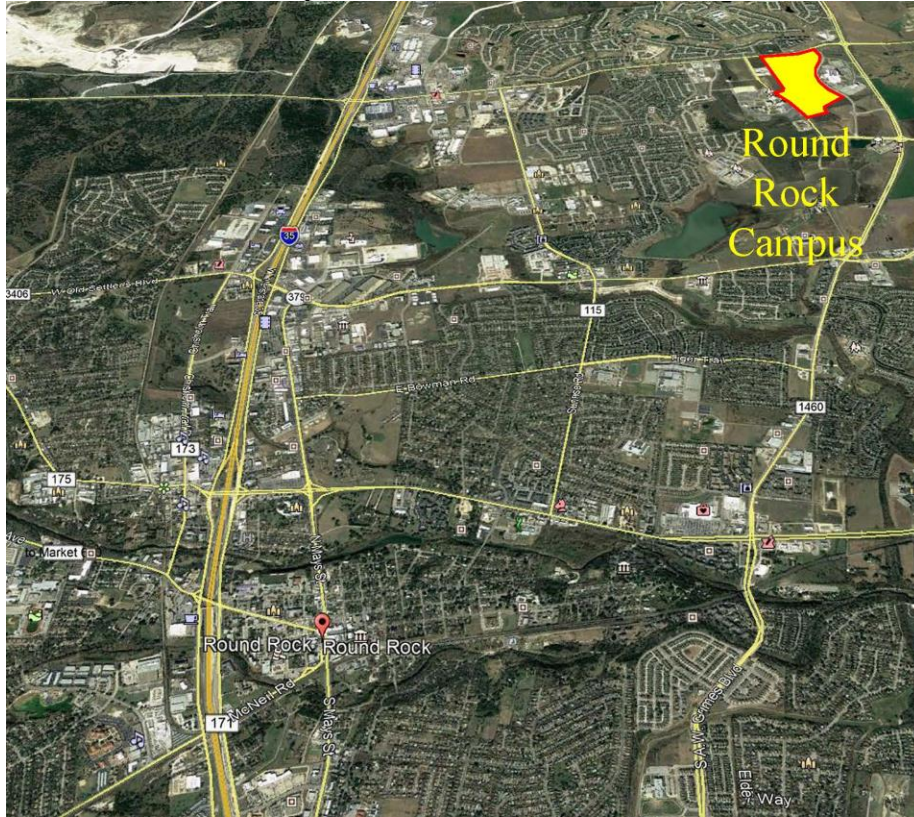
6.6.2 Changes in Project Approach

The Owner understands that as Respondents and the Owner continue their individual and collective efforts to analyze and develop optimal development, design, construction, operations, maintenance, and financing plans for the Project, it is likely that the approaches to such elements of the scope of work will change and evolve. The Owner wishes to encourage that evolution and continued focus by Respondents on the best facilities solutions for the Project. Accordingly, it is the Owner’s intention to use the approach to the Project only for purposes of evaluating the SOQs. Respondents may modify, alter and enhance their respective approaches to financing, development, design, construction, operations and maintenance in conjunction with their Proposals, subject to compliance with the requirements of the RFP. Respondents may not, however, change their approach to the Project in a way that renders the SOQ a misrepresentation of Respondent’s intentions and capabilities.

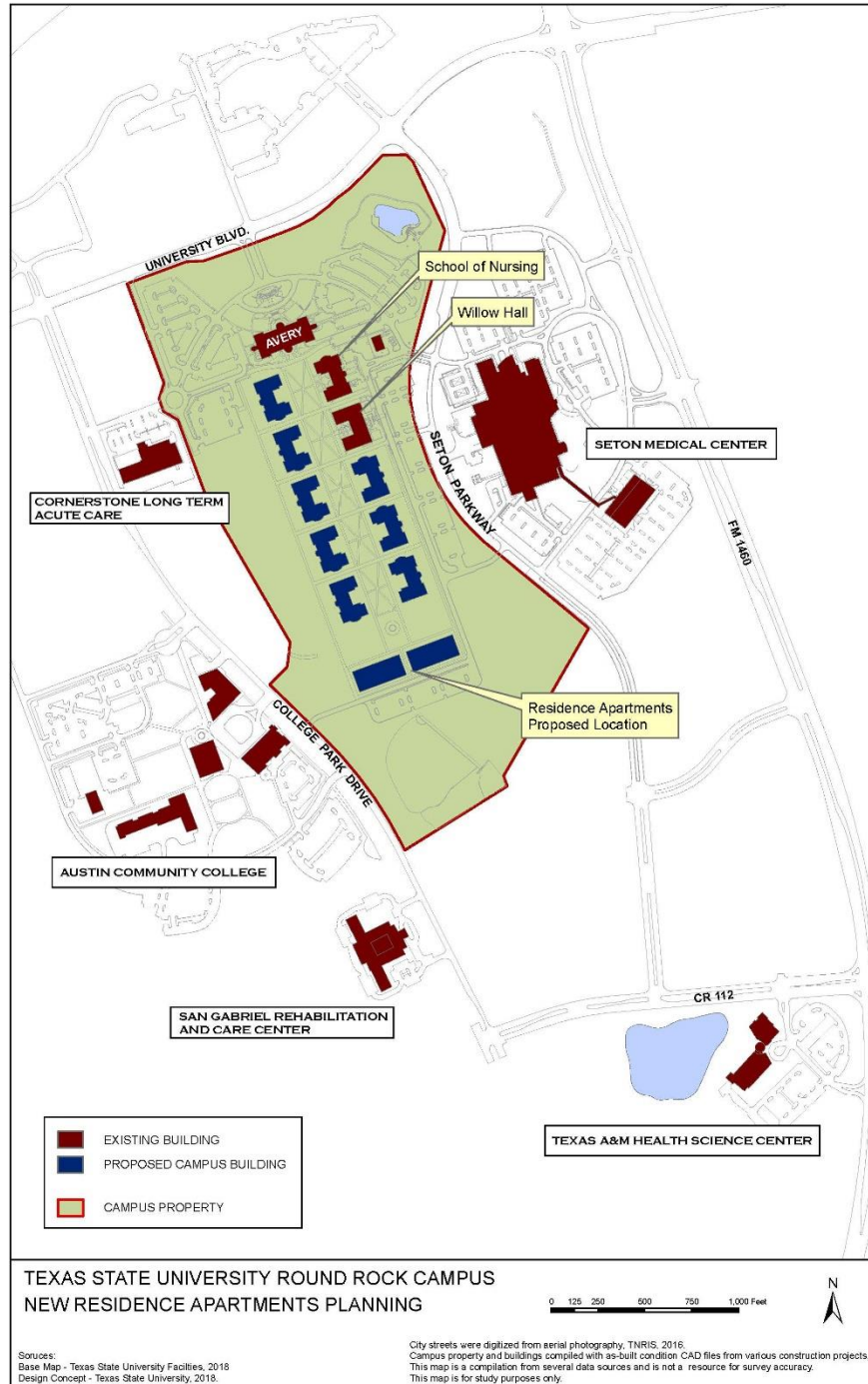
END OF REQUEST FOR QUALIFICATIONS

Attachment 1

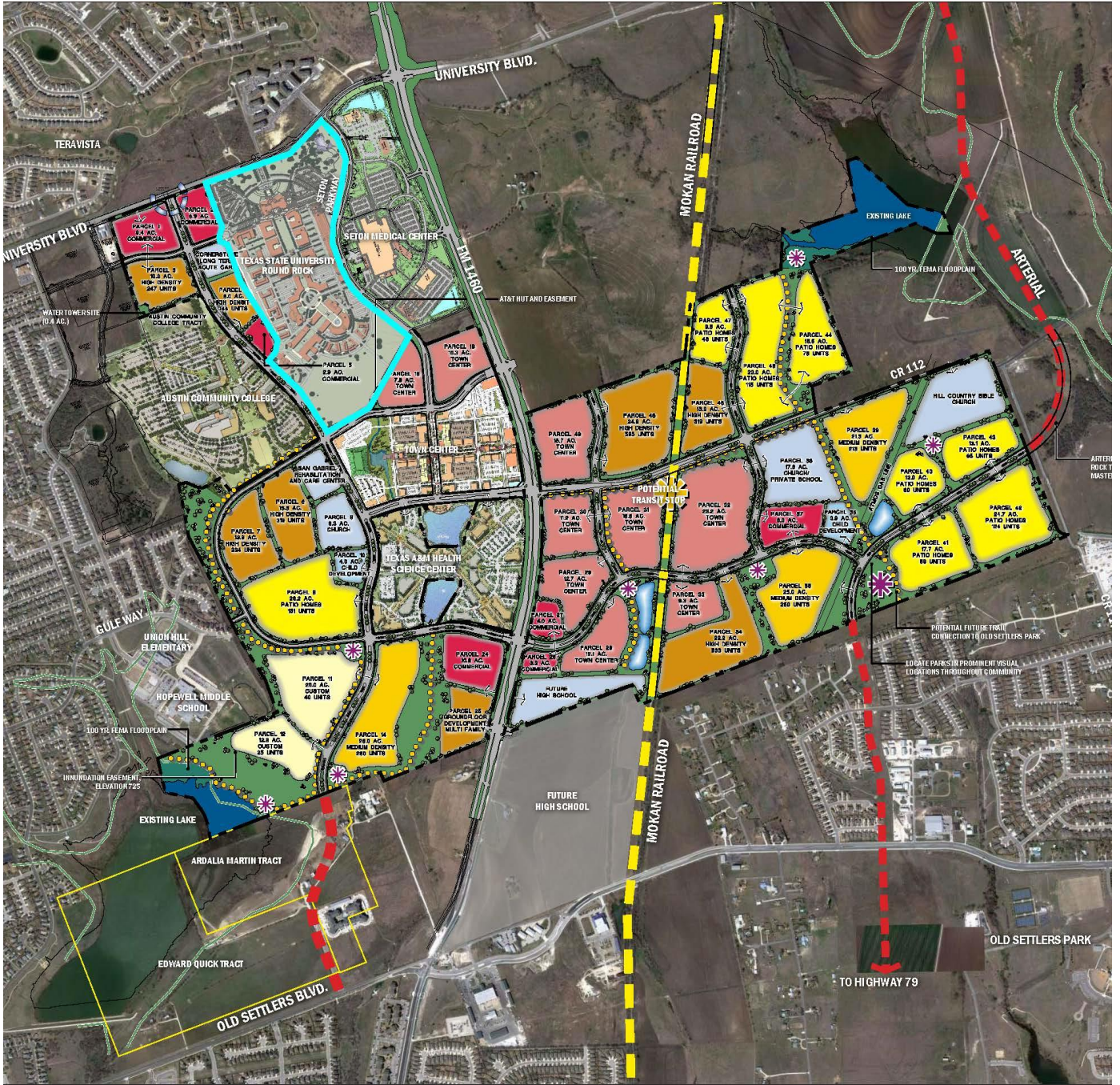
Proposed Site – Round Rock Area



Attachment 2 Proposed Development Site



Attachment 3
Avery Centre - Master Concept Plan



FINAL CONCEPT PLAN
REVISED: AUGUST 11, 2015

AVERY CENTRE

ROUND ROCK, TEXAS

Addendum No. 1

Issued June 14, 2018

**REQUEST FOR QUALIFICATIONS
FOR DEVELOPER
FOR
STUDENT APARTMENT PROJECT**

**TEXAS STATE UNIVERSITY
ROUND ROCK, TEXAS**

RFQ No.:

758-18-09082

Notice To All Respondents:

The following is Addendum No. 1 to the Request for Qualifications (RFQ)
ESBD Posting No. 758-18-09082 was posted on May 30, 2018

Prepared By:

*Rob Roy Parnell, Deputy Vice Chancellor for Capital Projects Administration
Texas State University System
601 Colorado . Austin, TX 78701 . (512) 463-1808
robroy.parnell@tsus.edu*

I. General:

A. The optional Pre-Proposal Conference was held on June 12, 2018, 9:30 a.m. at the J.C. Kellam Building. The Attendance Sign-In Sheets are included as part of this Addendum along with the questions and answers presented in response to this solicitation:

1. Question:

What is the Building footprint? How many acres are approved for the project? What are the Parking requirements?

Answer:

Texas State University has no building footprint in mind and there is no restriction on the acreage for the project. RFQ references an anticipation of approximately 500 beds. The respondent may propose more or less than that. The City of Round Rock Code of Ordinances addressing Multifamily housing off-street parking requirements can be used as a guide.

2. Question:

Are there any height restrictions for the project?

Answer:

Currently buildings are 3 stories plus one story at or below grade in the case of Avery and Willow Hall. Texas State University is interested in learning about the qualifications of your team at this phase of the project. Building height for the Student Apartment Project will be addressed in the Request for Proposals.

3. Question:

Texas State University is State property and as such is exempt from municipal regulations. A P3 project can trigger some requirements. What is the university's position?

Answer:

Section 3.3.4.7, Permitting in the RFQ states: "The Developer will be responsible for all permits, fees and approvals from authorities having jurisdiction for the contracted Project scope. The University will assist the Developer with all permit-related activities." Texas State expects the project to be code compliant and will review the documents and observe construction.

4. Question:

Will the university issue the permits?

Answer:

No.

5. Question:

Mr. Parnell stated that no demand studies have been done, is this correct? Will this be part of the RFP?

Answer:

The university is leaving demand studies up to the respondents.

6. Question:

Has the university thought about student relation demand, future projections of student numbers?

Answer:

The RFQ provides current numbers and projected increases on page 9. “Enrollment at the Round Rock Campus for the fall 2017 semester totaled 1,586 students....three College of Health Professions departments will move from San Marcos to the Round Rock Campus: Communication Disorders (moving in August 2018), Physical Therapy (moved May 2018), and Respiratory Care (moved May 2018) accounting for approximately 500 additional full-time students a majority of which are upper classmen and graduate students.” Additional information – the next building for the Round Rock Campus will be Esperanza Hall. The remaining College of Health Professions departments will relocate to Round Rock upon its completion. The construction of that building is dependent on receiving Tuition Revenue Bond funding from the Texas State Legislature. There is currently no projected date for that project. Enrollment projections for that project will be available in the RFP.

Additional questions must be submitted in writing by email to Ms. Nancy Nusbaum, Associate VP for Finance and Support Services Planning, nnusbaum@txstate.edu by 5:00 p.m., June 22, 2018.

III Revisions:

- A.** Page 5 of 28, Section 1.4.1: Revise the hyperlink to the Electronic State Business Daily with the following: <http://www.txsmartbuy.com/sp/758-18-09082>
- B.** Page 6 of 28, Section 1.6.1: Add: The University will receive Qualifications for this RFQ in Room 920, J.C. Kellam Building, Texas State University, San Marcos, Texas.
- C.** Page 11 of 28, Section 3.3.1: Add to fifth bullet: Recreation and wellness space is planned for the Avery Building with construction beginning in 2018 along with a lighted playing field next to Willow Hall.
- D.** Page 14 of 28, Section 3.4, PROJECT PLANNING SCHEDULE: The project schedule shall be removed and replaced with the following:

<i>System release RFQ</i>	<i>5/30/18</i>
<i>Optional Pre-submission Conference</i>	<i>6/12/18 – 9:30 am JCK 11th Floor</i>
<i>Deadline for questions from Respondents</i>	<i>6/22/18 – 5:00 pm</i>
<i>RFQ's Submitted</i>	<i>7/23/18 – 12:00 pm – JCK Building, Suite 920</i>
<i>Interviews with RFQ Respondents</i>	<i>Week of 8/20/18 (likely date - 8/22/2018)</i>

<i>RFP Finalists selected</i>	<i>8/28/18</i>
<i>RFP Released to finalists</i>	<i>9/5/18</i>
<i>Optional Pre-proposal Conference</i>	<i>9/19/18</i>
<i>Deadline for RFP questions</i>	<i>10/3/18</i>
<i>Interviews of RFP respondents</i>	<i>Late November, 2018</i>
<i>Contracts completed</i>	<i>March, 2019</i>
<i>Initial construction begun</i>	<i>April, 2019</i>
<i>Substantial completion and occupancy of Project</i>	<i>August, 2020</i>

The schedule of events presented above represent a basic timeline. A final project timeline will be developed with the Owner at a later date.

- E.** Page 25 of 28, Section 6.5.1: The point distribution for the Technical portion of the evaluation (total of 100 points) is outlined below:

MAX Points	Criteria
10	1 – RESPONDENT’S STATEMENT OF QUALIFICATIONS AND AVAILABILITY TO UNDERTAKE THE PROJECT
10	2 – PRIME FIRM’S ABILITY TO PROVIDE THE SERVICES
10	3 – PROJECT TEAM’S ABILITY TO PROVIDE THE SERVICES
25	4 – RESPONDENT’S PERFORMANCE ON PAST REPRESENTATIVE PROJECTS
10	5 – RESPONDENT’S KNOWLEDGE OF BEST PRACTICES
10	6 – RESPONDENT’S ABILITY TO IDENTIFY AND RESOLVE PROBLEMS ON PAST PROJECTS
25	7 – FINANCIAL REQUIREMENTS

- F.** Not previously included in the RFQ: The Texas State University System Process for Public-Private Partnership (P3) Projects link is missing from the RFQ - <http://gato-docs.its.txstate.edu/jcr:coa782c6-4767-49e2-b2ec-4c9f54b984a6/P3%20Process%20Guidelines.pdf>

Attachments:

- (1) Pre-Submittal Attendance Sign-In Sheets

- **END OF ADDENDUM NO. 1** -

Attendance - Opening

June 12, 2018 @ 2:00 p.m. - JCK 1100

Student Apartment Project

RFQ #: 758-18-09082

	Company	Address	Name	Email Address	Phone #
1	CA Ventures	130 East Randolph Street, Suite 2100, Chicago, IL 60601	Zeb Thomas	jjohnson@ca-ventures.com	903-654-1660
2	Cadence McShane Construction	1221 South MoPac Expwy., Suite 250, Austin, Texas 78746	Don Watkins	dwatkins@cadancemcshane.com	210-556-5504
3	Casey Development	200 E. Basse Road, Suite 300, San Antonio, Texas 78209	Ory Kalenkosky	okalenkosky@caseydev.com	210-380-4769
4	DataCom Design Group	7600 Burnet Road, Suite 350, Austin, Texas 78757	John Rob Hicks	jhicks@datacomdesign.com	512-478-6001
5	Datum Engineers	8140 N. MoPac Expwy., Building 1, Suite 120, Austin, Texas 78759	Erika Passailaigue	erikap@datumengineers.com	512-469-9490
6	Doucet & Associates	7401 B Hwy 71 West, Suite 160, Austin, Texas 78735	Ed Theriot	etheriot@doucetengineers.com	512-618-2865
7	GarzaEMC	7708 Rialto Blvd., Suite 125, Austin, Texas 78735	Rudy Garza	rgarza@garzaemc.com	512-971-3510
8	Gilbane	1331 Lamar Street, Suite 1170, Houston, Texas 77010	Angela Cotie	acotie@GilbaneCo.com	281-830-4966
9	Hunt Development Group	19722 CR 4130, Lindale, Texas 75771	David Braden	robert.kelly@huntcompanies.com	915-449-0560
10	JE Dunn Construction	901 S. Mopac Expressway, Bldg. 2, Suite 375, Austin, Texas 78746	Laura Geutner Jennifer Finch	laura.gentner@jedunn.com jennifer.finch@jedunn.com	512-687-6179
11	JQ Engineering	108 Wild Basin Road, Suite 350, Austin, Texas 78746	Emily Jaster	ejaster@jqeng.com	512-474-9094
12	Kirksey Architecture	6909 Portwest Drive, Houston, Texas 77024	Steve Duram Elizabeth Wolf	steved@kirksey.com elizabethw@kirksey.com	713-426-7521 512-669-6316
13	Lake Flato Architects	311 3rd St, San Antonio, TX 78205	Ryan Yaden	ryaden@lakeflato.com	210-679-2358
14	Lendlease Communities	1201 Demonbreun Street, Suite 800, Nashville, TN 37203	Mark Frey	mark.frey@lendlease.com	615-324-8804

15	PGAL	3131 Briarpark, Suiye 200, Houston, Texas 77042	Jeffrey Casinger	JCasinger@pgal.com	713-622-1444
16	Servitas, LLC	5525 N. MacArthur Blvd., Suite 760, Irving, Texas 75038	David Braden	dbranden@servitas.com	502-773-4873
17	STG Design	828 West 6th St., Suite 300, Austin, Texas 78703	Kevin Blackburn	kblackburn@stgdesign.com	512-899-3550
18	Texas State University System	601 Colorado Street, Austin, TX 78701-2904	Rob Roy Parnell	robroy.parnell@tsus.edu	512-463-1808
19	Texas State University	1555 University Blvd., Round Rock, Texas 78665	Edna Rehbein	edna@txstate.edu	512-716-4444
20	Texas State University	601 University Drive, San Marcos, Texas 78666	Rascuala Roque	pr16@txstate.edu	512-245-2202
21	Texas State University	601 University Drive, San Marcos, Texas 78666	Dan Alden	danalden@txstate.edu	512-245-2521
22	Texas State University	601 University Drive, San Marcos, Texas 78666	Bonnie Corkran	y_c55@txstate.edu	512-245-3657
23	Texas State University	601 University Drive, San Marcos, Texas 78666	Rosanne Proite	rp43@txstate.edu	512-245-4610
24	Texas State University	601 University Drive, San Marcos, Texas 78666	Carolyn Holesovsky	ch26@txstate.edu	512-245-2244
25	Texas State University	601 University Drive, San Marcos, Texas 78666	David Bisett	db62@txstate.edu	512-245-2244
26	Texas State University	601 University Drive, San Marcos, Texas 78666	Nancy Nusbaum	nn01@txstate.edu	512-245-2244

Addendum No. 2

Issued June 26, 2018

REQUEST FOR QUALIFICATIONS FOR DEVELOPER FOR STUDENT APARTMENT PROJECT

**TEXAS STATE UNIVERSITY
ROUND ROCK, TEXAS**

RFQ No.:

758-18-09082

Notice To All Respondents:

The following is Addendum No. 2 to the Request for Qualifications (RFQ)
Addendum No. 1 was posted on June 14, 2018
ESBD Posting No. 758-18-09082 was posted on May 30, 2018

Prepared By:

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I. GENERAL:

Below are the questions that were presented along with answers to each in relation to this RFQ as of June 22, 2018.

1. **Question:** Will Texas State guarantee any occupancy rate or require students to live onsite?
Answer: No.

- **END OF ADDENDUM NO. 2** -