



FLORIDA POLYTECHNIC
UNIVERSITY

COMPETITIVE SOLICITATION

22-012 REQUEST FOR QUALIFICATIONS

STUDENT HOUSING DEVELOPMENT PROJECT

ISSUED: FEBRUARY 22, 2022

RESPONSES DUE:
MARCH 14 , 2022



Request for Qualifications (RFQ)
22-012 Student Housing Development Project

Date: February 22, 2022

TO: Potential Respondents

Florida Polytechnic University (hereinafter referred to as *the University*) is soliciting responses from qualified firms to a Request for Qualifications (“RFQ”) for a Student Housing Development Project. This project will be to develop a new on-campus student residence facilities at FLORIDA POLYTECHNIC UNIVERSITY located in Lakeland, Florida and potential refinancing of an existing residence hall.

Carefully review this RFQ. This RFQ contains statements, descriptions, and analysis of Florida Polytechnic University’s campus, the current housing market, and other project background information. Such statements, descriptions and analysis are for informational purposes only. The University does not guarantee or represent and warrant the completeness or accuracy of such information, and any Respondent should complete its own due diligence with respect to such information.

IMPORTANT NOTICE: Response to this RFQ (Stage 1) is a requirement for participating in the Stage 2 Invitation to Negotiate (ITN) for the Student Housing Development Project

Response Submission and Deadline:

Responses to Stage 1, RFQ 22-012, need to be submitted electronically to the Procurement Facilitator no later than 4:00pm, Tuesday, March 14, 2022. Any questions concerning this RFQ should be directed in writing to the Procurement Facilitator (procurement@floridapoly.edu) no later than March 01, 2022; 4:00 PM (ET).

Responses for Stage 1, RFQ 22-012, must be delivered to the University electronically following the procedure described in this document.

Note: Responses received after the closing date and time will not be considered.

Respondents are fully responsible for obtaining the complete RFQ, Addenda (if applicable), and information concerning this process by visiting our web site: <https://floridapoly.edu/procurement/solicitations.php>

The name of the Respondent may be disclosed at a public Response closing. Because purchases or contractual agreements of this nature require the expenditure of public funds and/or use of public facilities, Respondents should be aware that portions (potentially all) of their Response (including any final contracts) will become public record after its acceptance by the Florida Polytechnic Board of Trustees.

ANDREA CASHELL
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FLORIDA POLYTECHNIC UNIVERSITY PROCUREMENT

RFQ 22-012 STUDENT HOUSING DEVELOPMENT PROJECT

SUBMITTAL DUE DATE: March 14, 2022, TIME: 4:00 PM ET

Section I - OVERVIEW

1.0 General Information and Summary

FLORIDA POLYTECHNIC UNIVERSITY is a public, research institution with a mission to educate students emphasizing Science, Technology, Engineering, and Mathematics (STEM) in an innovative, technology- rich, and interdisciplinary learning environment. The university collaborates with industry partners to offer students real-world problem- solving, work experience, applied research and business leadership opportunities. The university prepares students to assume available leadership positions in the dynamic technological landscape in Florida, the nation, and the world.

The University's website (<https://floridapoly.edu/>) provides additional information, which may be useful to the Respondent.

The University intends to contract with one (1) firm to provide a solution for the Student Housing Development Project . The awarded contract(s) will be non-exclusive.

The purpose of this (RFQ) is to pre-qualify and shortlist Respondents to participate in the ITN for the Student Housing Development Project. This RFQ is intended solely to obtain information to assist Florida Poly to evaluate the potential for private partnership opportunities for new University Resident Hall (s).

Please note: There are two (2) Stages to this Student Housing Development selection process

Stage 1: RFQ (Request for Qualifications)

Qualifications Based Conceptual Stage - All responses submitted in response to this RFQ will be evaluated based on the criteria identified below. Following a review of Stage 1 responses, Florida Polytechnic University will establish a shortlist of approximately three (3) – six (6) of the most qualified Respondents for invitation to participate in the Stage 2 ITN process. A response to this RFQ is a prerequisite to participate in subsequent stages.

This RFQ process will assist in identifying interested parties that have the qualifications, experience, and financial capacity necessary to assume the responsibilities of the Private Entity.

Stage 2: ITN (Invitation to Negotiate)

Detailed information regarding the ITN, will be provided in the ITN documents.

No contract or agreement will be entered into directly as a result of this RFQ (Stage 1) nor does this RFQ commit the University to continue with the ITN. However, it is important to note that the University recognizes the time, effort, and expense in firms responding to this RFQ and therefore, makes a Response to this RFQ (Stage 1) a requirement and prerequisite for further participation.

2.0 Timetable

The anticipated schedule and deadlines for Stage 1 of the RFQ are projected as follows:

STAGE 1 ACTIVITIES	Time Eastern Time	Date
Issue Request for Qualifications (RFQ)	N/A	02/22/2022
Deadline date for written questions	4:00 p.m.	03/01/2022
University approximate response to written questions	N/A	03/04/2022
Submittal Due Date	4:00 p.m.	03/14/2022
Issue Invitation to Negotiate (ITN) Stage 2	N/A	TBD

Notes: All dates are estimated. Any change in dates will be announced to all parties by way of Addendum.

3.0 Contact Person

The Procurement Facilitator and sole contact for this RFQ is:

Procurement Facilitator: Andrea Cashell

Title: Director of Procurement

Email: procurement@floridapoly.edu

Phone: 863-874-8583

Web address: <http://floridapoly.edu/procurement>

Respondents are advised that from the date of release of this RFQ until award of a contract pursuant to the ITN, all communications shall be directed to the Procurement Facilitator listed above. Any unauthorized contact may result in the disqualification of the Respondent's submittal.

Respondents are fully responsible for obtaining the complete RFQ, addenda (if applicable), and all other related information by visiting our web site. <https://floridapoly.edu/procurement/solicitations.php>

Explanation(s) and/or questions regarding the meaning or interpretation of this RFQ must be requested from the Procurement Facilitator, by e-mail prior to the deadline date, as stated in Section I "2.0 Timetable". All responses will be issued in the form of an Addendum and posted to our web site. It is recommended that you bookmark this website and visit it frequently throughout this entire process.

Any changes or clarifications to requirements shall be issued by official addenda. Respondents should not rely on any representations, statements, or explanations other than those made in writing by the University's sole Procurement Facilitator in the official addenda format. Where there appears to be a conflict between the ITN and any addenda issued, the last written addenda shall prevail.

4.0 Solicitation Documents

1. RFQ 22-012 – Solicitation Document (including any addenda)
2. Attachment A: Affidavit Form
3. Attachment B: B&D Presentation
4. RFQ Terms and Conditions

Section II - SCOPE OF SERVICES and SOLICITATION PROCESS

1.0 Overview of Partnership Opportunity

Florida Poly is issuing this RFQ to solicit responses from interested parties (“Private Entity” or “Private Entities”) to partner with the University to deliver new on-campus student housing and refinance the purchase of existing Phase II student housing in a bundled opportunity (the “Project”). The University has not determined at this time whether it will pursue the Project through a public-private partnership for the design, construction, financing, and possibly operations, and maintenance of the student housing, or if it will utilize public financing while seeking a private partner for the design, construction, and possibly operation, and maintenance of the housing. A more refined scope will be provided in the Stage II ITN to qualified Private Entities that have been shortlisted through this RFQ process.

A brief overview of the Project is provided below. Further detail of each Partnership Opportunity will be provided to a short-list of Private Entities who respond to the first phase of this RFQ. Based on the University’s review of Responses to this RFQ, Florida Poly will provide notification to the most qualified Private Entities (“Qualified Respondents”) with an invitation to respond to the second stage of this process (“Stage 2 or ITN” or “ITN Stage 2”). Qualified Respondents will then have the opportunity to submit detailed responses (“Response” or “Responses”) proposing a Partnership with the University.

As part of the development of the Project, it is assumed that – under the terms of a Pre-Development Agreement with the University – the selected Private Entity/(ties) will be required to pay all predevelopment costs associated with the site, including infrastructure and concurrency costs, as needed .

Two (2) or more Private Entities may collaborate in submitting a Response to this opportunity, but a single Private Entity must be designated to contract with the University and be responsible for performance under any future contract.

Through this process the University desires to negotiate the best value agreement(s) for the University. All responses should be submitted in accordance with the terms and conditions contained in this document and any documents associated with this RFQ.

The University reserves the right to adjust or augment the scope of the Partnership Opportunity, at its discretion, including the components outlined below.

Existing Housing

- o Florida Poly currently has two residence halls on campus (referred to as Phase 1 Housing and Phase 2 Housing), with a total bed count of 761 beds.
- o Both residence halls are currently owned by Vestcor Companies and operated by Coastal Ridge Real Estate.
- o Florida Poly is anticipating purchasing Phase 2 Housing prior to Fall semester 2022.

Partnership Opportunity

- The new housing project (“Phase 3 Housing”) will consist of approximately 500 beds, in a mix of suite-style and apartment-style configurations, primarily targeting non-freshmen.
- The University desires to deliver Phase 3 Housing for occupancy in Fall 2024.
- o The Phase 3 Housing is contemplated to be located in the vicinity of the Phase 2 Housing.
- o Florida Poly is in the process of purchasing the Phase 2 Housing from Vestcor and will desire to bundle the refinance of its Phase 2 Housing purchase price with the financing for the new housing project.
- o Through this Project, the University may desire to engage in an operating agreement to deliver facility maintenance, asset management, and custodial services for the Phase 2 and/or Phase 3 Housing.

2.0 Objective

Through this RFQ and subsequent ITN process, the University is seeking to identify a Private Entity with appropriate qualifications, experience, financial capacity, and a proven track record of executing similar

projects.

Following receipt of the Responses on RFQ, the University will establish a shortlist of the Qualified Respondents to continue in the process and further develop the framework structure for a Partnership with the University. A Response to this RFQ is a prerequisite to participate in subsequent steps.

3.0 Highlights of the University and Description of the Partnership Opportunity

3.1 Florida Polytechnic University Background and Overview

Created as an independent university in 2012, Florida Poly is the newest of the 12 institutions that comprise the State University System of Florida. Located on 170 acres in Lakeland, FL, it is the system's only university focusing solely on STEM education. The University's affordable degree programs include cutting-edge experience curricula informed by industry partners, leading to rankings as one of the best regional universities in the South and accolades for its undergraduate- and masters-focused Engineering department.

The University has tripled in size from approximately 500 students when it opened its doors in 2014 to an enrollment of 1,552 in Fall 2021 and is actively expanding its facilities. Florida Poly opened the Student Development Center in 2018 and is close to completing the 90,000 square foot Applied Research Center (ARC) adjacent to its iconic Innovation, Science and Technology (IST) Building. Additionally, Florida Poly is implementing the first phase of its Research Park Vision by entering into a public-private partnership between the University and the Fortune 500 company International Flavors and Fragrances to build a high-tech research center on campus (see: <https://floridapoly.edu/news/articles/2021/09/090121-p3-floridapoly-iff.php>).

While the institution is young compared to many national public institutions, Florida Poly continues to develop as an innovative teaching and research university with a focus on continually increasing its academic standing and economic impact. Enrollment has grown accordingly, as the last eight years have increasingly demonstrated the value of a Florida Poly degree. In response to this growth, the University will need to expand its on-campus student housing capacity. This need is particularly acute due to the University's location outside Lakeland, where very little housing exists close to the University, either available to the general population or marketed specifically to the student population. Additional on-campus housing capacity is central to the University's plans for growth.

Additional information about Florida Poly is available on the University's website and can be accessed here: <https://floridapoly.edu/about/index.php>

3.1.1 Current Enrollment and Projections

The University is focused on sustainably growing its student population, with a particular focus on first-time in college (FTIC) freshmen. Florida Poly has increased its incoming freshman class over the last three years and expects to continue on that trajectory through 2025. The persistence of these somewhat larger cohorts over their educational careers will have a compounding effect on total enrollment, helping Florida Poly to attain a projected enrollment of over 2,500 students in the next several years.

Figure 1. Historical and Projected Enrollment

Fall Term	Historical					Projected			
	2017	2018	2019	2020	2021	2022	2023	2024	2025
New FTIC	322	320	303	374	534	513	541	603	640
New Undergrad Transfers	80	72	77	78	87	94	100	106	113
Continuing Undergrad	996	975	898	883	917	1,022	1,198	1,438	1,591
Graduate Students	17	33	47	72	79	88	113	134	155
2nd Bachelor's Degree	30	20	11	13	13	17	19	19	21
Total	1,445	1,420	1,336	1,420	1,629	1,734	1,970	2,301	2,520

Importantly for student housing, Florida Poly enrolls high percentages of non-local students (students from outside Polk County) as well as full-time students. These ratios are shown below:

Figure 2. Non-Local and Full-Time Percentages for Select Populations

Fall Term	2019	2020	2021
Total Non-Local Enrollment	84%	83%	84%
Non-Local FTIC	89%	90%	90%
Non-Local Continuing Undergrad	85%	83%	83%
Non-Local Graduate	74%	77%	89%
Total Full-Time Enrollment	88%	85%	86%
Full-Time FTIC	99%	98%	99%
Full-Time Continuing Undergrad	87%	87%	81%
Full-Time Graduate	96%	94%	93%

3.1.2 Existing Housing System

Florida Poly's housing system consists of 761 beds in two residence halls. Phase 1 Housing opened in Fall 2014 and was followed in Fall 2016 by Phase 2 Housing. Use the link below to see the location of these facilities on Florida Poly's campus:

<https://cdn-map1.nucloud.com/nucloudmap/index.html?map=256&layer=Buildings&x=4290.958252&y=-1798.1674905&zoom=3>

The two residence halls offer distinct experiences for Florida Poly students. Phase 1 Housing is comprised of 219 beds in an apartment-style configuration, with living spaces and kitchenettes, and serves mostly upper-class students. Phase 2 Housing is oriented primarily towards freshmen, with 542 beds mostly in double-occupancy semi-suite configuration. Please see the chart below for a breakdown of each building by unit-type and recent rental rates:

Figure 2. Bed Counts and Recent Rental Rates by Building

	Bed Count	2020-2021 Monthly Rents	2021-2022 Monthly Rents
Phase 1 Housing			

4-bed / 2-bath apartment (private room)	196	\$940	\$961
3-bed / 2-bath apartment (private room, private bath)	6	\$1,049	\$1,073
3-bed / 2-bath apartment (private room, shared bath)	12	\$962	\$984
1-bed / 1-bath semi-suite (RA)	5	\$0	\$0
Total / Weighted Avg.	219	\$923	\$944
Phase 2 Housing			
2-bed / 1-bath semi-suite (double room)	488	\$689	\$704
4-bed / 2-bath apartment (private room)	36	\$902	\$922
1-bed / 1-bath semi-suite (RA)	18	\$0	\$0
Total / Weighted Avg.	542	\$680	\$695
University Total / Avg.	761	\$749	\$767



Figure 4. Phase 1 Housing



Figure 3. Phase 2 Housing

At this time, Phase Two housing continues to be owned and operated by Vestcor and its agents.

3.1.3 Student Housing Vision and the Strategic Plan

Florida Poly's Department of Residential Life endeavors to create an inclusive living-learning environment that encourages students' emotional, intellectual, and personal growth. As a STEM-focused institution, Residential Life at Florida Poly plays an especially important role in cultivating a well-rounded student body that has the skills and experience to succeed outside the classroom.

The provision of additional housing is a key step in achieving the University's institutional goals. Goal #1 in Florida Poly's Strategic Plan (Florida Poly 2.0: Advancing to Excellence) is to grow the size of its incoming freshman class, while bringing to Lakeland the best students from inside and outside the state of Florida. This means attracting more non-local students and also increasing the percentage of female students on campus – both of which are populations that take advantage of on-campus housing at higher rates.

Additionally, residence life is an important venue through which the University can promote its students' academic success (Goal #6). Nationally, rigorous engineering curricula like that offered at Florida Poly require enhanced support to ensure positive student outcomes. The University has previously focused its efforts on mental health counseling, advising and tutoring, building up social and club offerings, and providing career services to ensure the academic and personal success of Florida Poly students. As the University strives to help students build community and learn essential skills in leadership and communication (Goal #7), it desires to integrate these student success efforts more fully with its housing program. This will happen not only by expanding the opportunity to take

advantage of on-campus housing and providing high-quality residential programming, but also by providing a higher level of service to residents in the management and operations of housing than is currently provided. As such, the provision of new, high-quality student housing and the purchase of its freshman-focused Phase 2 Housing are mission-critical for the University's advancement in the near- and long-term.

3.2 Partnership Opportunity Goals and Objectives

Florida Poly is interested in achieving the following objectives through the delivery of the Project:

3.2.1 Project Objectives

- **Support Anticipated Enrollment Growth Through Enhanced On-Campus Offerings:**
As outlined by the University's Strategic Plan, Florida Poly's enrollment management plan focuses on recruiting the highest-quality students and advancing their academic careers through graduation. The strengthened academic profile of students, which has occurred in recent years and will continue to be a focus of the University, requires that Florida Poly recruits from a broad geographical area. As a result, Florida Poly must ensure sufficient housing options are available to support these students throughout their time at the University.
- **Provide Additional Housing Options in a Fiscally Responsible Manner:**
In order to meet the needs of both current and future Florida Poly populations, the University understands the importance of strategically investing in capital projects that are both central to the core mission and implemented in a manner that is fiscally responsible. With regards to future housing, Florida Poly will evaluate all implementation solutions and funding options through data analysis, market sounding, and risk transfer metrics. Delivery decisions for future Florida Poly housing assets as part of this project will focus on financial implementation solutions that are optimal to advance the University's needs holistically.
- **Balance Self-Sufficiency with Financial Accessibility:**
Existing and new housing offerings should provide a compelling value proposition to highly-qualified students from a broad geographic area. While the University understands the need for the Project to be financially successful, the University is also interested in providing a financially-accessible education to all students. Additionally, with regards to the existing housing system, Florida Poly must maintain University credit ratings while concurrently delivering new housing and refinancing the purchase of Phase 2 Housing. In support of these strategic objectives, Florida Poly desires to maintain control over rental rates that can be charged for the Project by requiring approval of initial rates and subsequent increases sought by the Private Entity.
- **Improve Resident Experience and Align Housing Quality with University Brand**
In addition to Florida Poly's ambitions for a robust residence life experience, the quality of on-campus housing at Florida Poly must reflect the reality that the University does not require students to live on campus. As such, the student experience in Florida Poly's residence halls must position on-campus housing to attract and retain residents of choice. The management of the University's housing assets should reflect the overall high quality of a Florida Poly education.
- **Enrich the Campus Culture and Community Experience:**
Increasing the number of students living on campus will increase the population that engages with the campus during non-peak academic hours. As such, these students will have a higher propensity to be involved in student activities and campus programming, which will propel the University to expand co-curricular opportunities.

3.2.2 Development Advisor

Florida Poly has engaged Brailsford & Dunlavey, Inc. (B&D) to serve as its Development Advisor for this Project. B&D

is a national advisory and program management firm dedicated to serving educational institutions, public agencies, professional sports organizations, and non-profit clients.

3.2.3 Design Objectives

The University expects that the Project's buildings and site improvements are to be of Class A institutional quality and commensurate with top-tier American universities. The Projects must at least meet minimum requirements set forth by Florida Poly's design and construction standards (https://floridapoly.edu/wp-content/uploads/Campus_Design_Standards_03.19.19.pdf). The expectation is that the Project will demonstrate the design tenets adopted by the Associate of College and University Housing Officers – International (ACUHO-I) 21st Century Project focused on sustainability, flexibility, community, and technology.

University review and approval of the Project design will be required through all phases of the design process. The Private Entity will be required to comply with the University's Design Services Guidelines (2018), which are available at this link:

<https://bdsd.box.com/s/eoe309jfd39e6dqor3xnkegbv4vlbjm3>

Further detail regarding the Phase 3 Housing program included in this Project will be provided to Qualified Respondents as part of the ITN Stage 2. The building will support expansion of student life programming and community building, as well as provide space for individual and group study. Space must also be allocated for operational needs of the building including storage, custodial, maintenance, grounds, technology, trash, laundry, vending, and lobby and service desk locations. The exterior of the building and grounds is expected to complement the existing campus architectural language and meet the requirements in the design guidelines.

3.2.4 Maintenance and Operations Objectives

The University may desire to engage in an operating agreement. Through the partnership, the University desires to engage in an operating agreement to deliver facility maintenance, asset management, and custodial services under the TN. These services are currently provided in both existing residence halls by a third-party, which is contracted through the owner Vestcor. The existing agreement for Phase 2 Housing will terminate upon purchase of the asset by the University.

Respondents short-listed to respond to the ITN Stage 2 will receive further details regarding the expected duties and level of service for facility maintenance, asset management, and custodial services responsibilities.

Florida Poly will be retaining all Residential Life responsibilities. The University will be compensated for providing these services, and this additional information will be provided to Qualified Respondents.

3.2.5 Financial and Credit Impact Objectives

The University's credit ratings, credit condition, and debt capacity are important to consider for development structures proposed for the Project. The University is interested in structures that are able to minimize or mitigate credit and financial impact to Florida Poly, while prioritizing University control over the residential experience and maximizing cash flow to the University.

As such, Florida Poly is in the process of determining whether it will utilize public debt for this Project or seek private financing through a ground lease with a Private Entity. Qualified Respondents will be asked in the ITN Stage 2 to submit Responses for selected financing scenarios.

The University reserves the right to not approve any Response which the University believes in its sole discretion will adversely impact the University's credit rating or debt capacity such that it impairs the University's ability to achieve other strategic objectives.

3.2.6 Florida Board of Governors ("BoG") Guidelines

If a P3 Partnership, is determined to be the mechanism, the State University System of Florida Board of Governors has created development guidelines for public-private partnerships. All P3 projects must adhere to the criteria set forth in the guidelines, and the project details will be provided to the Board of Governors for approval prior to execution of all legal documents and financial close. The P3 Guidelines can be found at the following link:

[Florida Board of Governors P3 Guidelines.](#)

If public financing, is determined to be the mechanism, the BOG also created Debt Management Guidelines for capital projects utilizing debt issued by the University or its direct support organizations ("DSOs"; in this case, the Florida Poly Foundation). If the University does not seek to finance the Project through the Private Entity, it must seek approval by the BOG in compliance with the Debt Management Guidelines, found at the following link:

[Florida Board of Governors Debt Management Guidelines.](#)

3.2.7 Implementation Analysis

In order to identify the Partnership Opportunity, the University engaged B&D in December 2021 to analyze Florida Poly's student housing needs.

Specifically, B&D completed the following tasks as a part of its analysis:

- An analysis was conducted to assess Florida Poly's vision for the desired role of new housing facilities in supporting the University's strategic objectives. The resulting information was then synthesized to prioritize the strategic objectives that must be accomplished in order for the University to achieve its objectives.
- A series of focus groups and stakeholder interviews were facilitated by B&D in order to engage Florida Poly students and faculty/staff members in dynamic conversations regarding their opinions, observations, and recommendations related to existing conditions and future opportunities for on-campus housing and quality-of-life facility integration.
- A comprehensive analysis of the off-campus rental housing market. This analysis identified that the Lakeland market does not support Florida Poly students and should not be relied on to capture the unmet on-campus housing demand.
- An Internet-based survey was administered to Florida Poly students to better understand the current satisfaction, participation, and needs related to on-campus housing, and to inform current and future latent demand for new or improved residential facilities. The response rate resulted in a statistically significant sample of the University's student population
- Stemming from the survey results, a demand analysis was conducted to evaluate the University's need for new or improved housing. The demand results were then reconciled with the University's strategic objectives to develop recommendations for the spaces that should be considered for inclusion in an eventual on-campus development effort.
- A system-wide financial model of Florida Poly's housing portfolio was constructed to evaluate the financial feasibility of the Project concept. The model also considered a variety of structures and delivery alternatives to confirm financial feasibility under a range of potential scenarios.
- A Value for Money ("VfM") Analysis was conducted to assess the financial benefits and considerations of various project delivery approaches to inform the University's stakeholders and assist in determining Florida Poly's preferred delivery method.

3.2.8 Housing Demand

The analysis conducted by B&D indicates that current housing demand exceeds the University's existing housing inventory and additional beds will be required to support the University's expected enrollment growth. Note that, as described in section Current Enrollment and Projections, Florida Poly has already achieved a substantial increase in the size of its freshman class and is anticipating growth of its FTIC fall cohort by only 100-110 students over the next five years. However, retention of these first-year students over the course of their academic careers will subsequently swell the ranks of upperclassmen. In order to retain these students and support their academic success beyond the first year, Florida Poly must be able to meet demand for housing from non-freshmen.

Figure 5. Current and Projected Housing Demand

Academic Year	Demand	Supply	Net Demand
2021-2022	936	761	(175)
2022-2023	1,142	761	(381)
2023-2024	1,282	761	(521)
2024-2025	1,488	761	(727)
2025-2026	1,628	761	(867)

Further details regarding B&D's demand analysis will be provided to Qualified Respondents as part of the ITN Stage 2.

3.2.9 Development Site

- Phase 3 Housing will be located along the primary axis of campus, between Phase 2 Housing and the University's main water feature (see highlighted parcel below). The location allows easy access to both the academic facilities at the northwest end of campus and the student life facilities on the southeast end of campus. It also allows for site design that relates to the existing housing buildings to create a cohesive residential community.



3.2.10 Housing Programmatic Requirements

Further detail regarding the Housing Programmatic Requirements will be provided to Qualified Respondents as part of the ITN Stage 1l.

3.2.11 Non-Housing Programmatic Requirements

Further detail regarding the Non-Housing Programmatic Requirements will be provided to Qualified Respondents as part of the ITN Stage 1l.

3.2.12 Parking Requirements

Further detail regarding the Parking Requirements will be provided to Qualified Respondents as part of the ITN Stage 2.

Section III - TERMS AND CONDITIONS RELATED TO THE RFQ PROCESS

1.1. Actions of Respondent.

The University is not bound by the actions of any Respondent with respect to third parties. The Respondent is not a division or agent of the University.

1.2. Collusion Prohibited.

Respondent's collusion with other respondents, other respondents' employees, or any employee of the University is prohibited and may result in rescission or cancellation of solicitation (or award) without liability to the University.

1.3. Conflict of Interest.

The award of this competitive solicitation is subject to the provisions of Florida Statutes, Chapter 112, and any other laws, regulations and/or policies concerning conflicts of interest in dealing with entities of the State of Florida (collectively, "Conflicts of Interest Rules"). Submission of a solicitation response, and acceptance of a contract resulting from the ITN, will require certification that Respondent is aware of and has complied with the requirements of the Conflicts of Interests Rules, including any requirement to file appropriate disclosures with the State of Florida Commission of Ethics prior to submission of a solicitation response.

Solely by way of example, Respondent must disclose in its solicitation response the name of any officer, director, or agent of the Respondent who is also an employee or public officer of The University, the State of Florida or of any of its agencies. Further, Respondent must disclose in its solicitation response the name of any University or State employee or public officer (or his or her spouse or child) who owns, directly or indirectly, an interest of five (5%) or more of the Respondent's company or any of its affiliates or branches.

In addition, in accordance with Section 112.3185, Florida Statutes, by submitting a solicitation response, the Respondent certifies that no individual employed by the Respondent or subcontracted by the Respondent has an immediate relationship to any University employee or public officer who was or is directly or indirectly involved in anyway in the drafting, evaluating, or awarding of this competitive solicitation.

Failure to disclose the required information or violation of the Conflicts of Interest Rules will be grounds for rejection of Respondent's solicitation response, cancellation of an intent to award, and/or cancellation of any Contract with the Respondent.

1.4 Covenant against Commissions, or Brokerage and Contingent Fees.

By submitting a Response, the Respondent warrants that the Respondent has not employed or retained any person or entity, other than a bona fide employee working solely for the Respondent, to solicit or secure any award, agreement, or any other advantage related to this solicitation.

1.5 Disposition of Responses.

All Responses become the property of the University, and the University has the right to use all ideas, and/or adaptations of those ideas, contained in any Response received in response to this solicitation. Any parts of a Response, and any other material(s) submitted to the University with the Response that are copyrighted or expressly marked as "confidential," "proprietary," "trade secret," or similar marking, (proprietary designation) will be exempt from the public records disclosure requirements of chapter 119, Florida Statutes, only to the extent expressly authorized

by Florida law. The mere use of a propriety designation, while necessary, by a respondent does not itself ensure that such materials will be exempt from disclosure. In the absence of a specific Florida statute exempting material from the public records law, the University is legally obligated to produce all public records produced or received in the course of conducting university business, irrespective of any proprietary designation by the respondent. The University, or potentially a court, will make the ultimate determination of whether a respondent's claim of a proprietary designation will support an exemption from disclosure. The University's selection or rejection of a Response will not affect this provision.

1.6 Public Records Laws; Trade Secret Certification.

As a public body corporate of the State of Florida, The University is subject to Chapter 119 of Florida Statutes, commonly known as the Florida Public Records Law. This competitive solicitation is a public record. Any documents Respondent submits to the University in response to this competitive solicitation will also become a public record, which will similarly be subject to the Florida Public Records Law. As required by law, The University will respond to public records requests without providing Respondents whose documents have been requested any notice.

Should Respondents seek to assert trade secret protection for any document the Respondent submits in response to this competitive solicitation under Florida Statutes Section 688.002(4), Section 812.081(1)(c), Section 815.04(3), and/or Section 815.045, for each document that trade secret protection is claimed, Respondent must comply with the following:

1. Segregate and separately label the document(s) claimed as trade secrets: documents produced electronically should be produced on separate CD or electronic media clearly-labeled "Trade Secret" on the physical media as well in the title of the electronic folder or file; documents produced in hard copy should be separated and each clearly labeled "Trade Secret." Inserting the words "Confidential" and/or "Proprietary" to the front of or the footer of a document does not automatically entitle the document to be a trade secret under Florida law and thus is insufficient to comply with this requirement; and
2. Provide a sworn affidavit (form is Attachment A) signed by a high-level officer of the Respondent to The University's Procurement Department, certifying the following for each separate claimed trade secret document:
 - a. Identify with specificity the document(s) for which trade secrets protection is claimed;
 - b. Provide a description of the document sufficient to determine the application of the trade secret exemption; and
 - c. Explain in detail the specific element(s) or provision(s) of Florida Statutes Section 688.002(4) or Section 812.081(c) that render the document at issue a trade secret exempted from public records under applicable Florida law.
3. A Respondent's failure to fully comply with the above and/or submit a sworn affidavit with its solicitation response is an affirmation acknowledgement by such Respondent that none of its documents are trade secrets.
4. If a Respondent properly complies and submits a sworn affidavit with its Solicitation Response and the University later receives a public records request for a document or information that is marked and certified with an affidavit to be a trade secret, the University will provide the requestor a copy of the Respondent's sworn affidavit. Any challenge to the affidavit and the application of the trade secret exemption will be rebutted, if at all, only by the Respondent; the University's only obligation will be to

provide Respondent notice that such a challenge has been received. The notice will serve as formal notice to the Respondent that such Respondent has thirty (30) calendar days following receipt of such notice from the University to file an action with a court of competent jurisdiction seeking an order barring public disclosure of the document(s). If Respondent files an action within thirty (30) calendar days after receipt of notice of a challenge to its trade secret certification, the University will not release the documents at issue pending the outcome of the legal action. The failure to file an action within thirty (30) calendar days constitutes a waiver of any claim of confidentiality, and the University will release the document as requested.

1.2. Modifications.

The University can reasonably modify or rescind the competitive solicitation at any time.

1.3. Public Entity Crimes.

In accordance with section 287.133(2)(a), Florida Statutes, a Vendor who has been placed on the convicted vendor list following a conviction for a public entity crime may not submit a Response; may not perform work as a contractor, supplier, subcontractor or consultant under a contract with any public entity, including the University; and may not transact business with the University in excess of the threshold amount provided in Section 287.017, for CATEGORY TWO for a period of 36 months from the date being placed on the convicted vendor list. By submitting a solicitation response, Respondent is certifying that Respondent is not on the convicted vendor list maintained by the Florida Department of Management Services, and Respondent is also certifying that any subcontractor listed in Respondent's solicitation response is not on the convicted vendor list.

1.4. Remedies and Applicable Law.

This RFQ and any disputes thereunder will be governed by the laws of the State of Florida and will be deemed to have been executed and entered into in the State of Florida and venue will always be in Polk County, Florida.

Section IV – SUBMITTAL REQUIREMENTS AND INSTRUCTIONS

1.0 Submittal Requirements

The following constitute the submittal requirements and evaluation criteria for the University to evaluate the Phase I ITN Responses. The Responses must follow the order provided below. In addition, the Phase I Responses should provide tabs correlating to each of the following criteria numbers below. It is critical that the Responses are consistent in order to ensure accuracy in the University's review process.

Responses must respond to each criterion in the following order:

- Cover Page
- Declaration of Intent
- Tab 1: Cover Letter
- Table of Contents
- Tab 2: Private Entity / Private Entities Background and Team Information
- Tab 3: Technical Capability
- Tab 4: Financial Capability
- Tab 5: Relevant Experience

A description of Tabs 2, 3, 4, and 5 is included below in further detail. An overview of tab 6 can be found in Required Forms section of this document.

1.1 **Tab 2: Background and Team Information**

Provide a description of the Private Entity or Private Entities, and the anticipated legal relationship (governance and capital structure) for the proposing Private Entity or Private Entities. Include in the description of the Private Entity or Private Entities the year founded, description and approximate value of real estate developed and currently under control, and an organizational chart.

- **Role of Private Entity's Key Personnel:** Briefly outline the roles of the key personnel for each Private Entity included in the Response. Provide resumes of key personnel, including length of time in current position with the company. For all key personnel, list information on any lawsuits, legal claims, or litigation in which they have been named individually or that resulted from a project in which they served on the development team or played a management role in the project oversight.
- **Contact Person:** Provide a single contact person for all future communication with the University. Disclose the contact person's name, title, organization, telephone number, and e-mail address.
- **Controlling Interest:** Identify the individuals or companies who hold a major or controlling interest in each Private Entity included in the submittal.
- **Design & Construction Partners:** Identify the design and construction professionals whom the Private Entity proposes to use for the Project's design and construction. Provide a brief overview for each firm and identify the roles of the firm's key personnel.
- **Management Partner:** Identify whether the Private Entity will be providing management, operations, and maintenance services or if it intends to partner with a third-party provider for these services. Provide a brief overview for the firm if other than the Private Entity and identify the roles of the firm's key personnel.

NOTE: Private Entities are not being asked to identify their full project team in the RFQ. Qualified Respondents invited to submit in Stage 2 will be required to identify and present qualifications for additional team members including engineering, financing, and other partners as applicable.

1.2 **Tab 3: Technical Capability**

1.2.1 **Development Implementation Experience**

Private entities should demonstrate that they, their design partners, and their contractors have significant experience delivering university housing projects on-time and on-budget. Demonstrated experience should include working with the State University System (SUS) and its Board of Governors to build university facilities in Florida.

For each of the Private Entity, design partner, and construction partner, please state:

- Total number of student housing beds designed or delivered nationwide
- Student housing projects designed or delivered in Florida, including opening year for each project
- Student housing projects designed or delivered for SUS institutions - provide opening year, project cost, total square footage, and bed count

1.2.2 **Maintenance Experience**

As described in Section 2.2.4 (Maintenance and Operations Objectives), the University desires to enter into an agreement with a Private Entity to provide facility maintenance, asset management, and custodial services in the existing Phase 2 Housing and the new Phase 3 Housing.

Please provide up to three (3) examples of similar student housing properties where the identified Management Partner has provided or is currently providing a scope of work similar to that described in the ITN. Each example should state:

- Years engaged at the property
- Total square footage
- Bed count
- Unit types
- Representative from affiliated institution, with name, phone number, and e-mail address

For each example, briefly describe how the Management Partner provided substantial value to its university partner. In particular, Florida Poly will be looking for:

- Demonstrated commitment to high standards of student service and satisfaction
- Substantial university facility maintenance experience
- Ability to collaboratively meet University goals through an integrated revenue and expense management strategy
- Ability to determine and implement a lifecycle management strategy

1.3 Tab 4: Financial Capability

Private Entities must demonstrate their financial capacity to complete and maintain the facilities over the term of the agreement.

Submittals must provide specific evidence that the Private Entity has the appropriate financial resources available or access to financing to successfully execute a project of this nature and scope by providing the following information:

- Current available financial resources
- Access to capital (debt, equity, other) in the current capital market
- Number and size of student housing transactions in the past two years.

Except as required by applicable law, materials marked as proprietary or confidential will be considered as such.

Note: As previously stated, the University expects that any agreement will be structured with the priority of minimizing the credit and financial impact to Florida Poly in the context of the University's other financial goals. As such, the University reserves the right not to approve any financing Response which it believes, in its sole discretion, will result in adversely affecting the University's credit profile or credit ratings.

1.4 Tab 5: Relevant Experience

Provide three (3) recent comparable projects that include public-private partnerships in which the proposing Private Entities have participated, preferably that were developed within the past ten (10) years.

Specify how each of these comparable projects relate to the proposed Partnership Opportunity outlined in this RFQ. Include information on the proposing Private Entity's role, the size of the project, and which proposing Private Entity's key personnel contributed to the project. Evidence should include brief project descriptions and a statement regarding the duration of proposing Private Entity's financial and operational involvement with each such project following completion. A brief description of the partnership structure and any impact the project had on the university's credit rating and balance sheet is also requested. Project examples should also include capital budget information and the number of beds to allow comparison of the cost of various levels of student housing quality.

Relevant projects will demonstrate an ability to design, construct, finance, and maintain the project while sustaining a long-term relationship with the institution. Project examples should demonstrate familiarity with on-campus student housing development. Teams should demonstrate that their role in the project added substantive value to the institution. Examples of value may include the project's performance and any other factual indications of success (project budget, facility operating standards, housing occupancy, operating performance, lifecycle management, alignment with financial requirements, etc.). Except as required by applicable law, materials marked as proprietary or confidential will be considered

as such.

For each of the three (3) required comparable recent projects, a general project description must be provided along with the following specific information submitted in the order and format described:

- a. Title of project;
- b. Owner of project with a representative's name, phone number, and e-mail address;
- c. Location of project;
- d. Use(s) of facilities (types of spaces included in facilities);
- e. Square footage of facilities in total and by types of spaces (e.g., housing, retail, living-learning, etc.);
- f. Total project cost of facilities constructed on the site;
- g. Construction costs on a per square foot basis and a "per bed" basis for the facilities;
- h. Architect for the project;
- i. General Contractor for the project;
- j. Total project schedule, including the date of Notice to Proceed and date of issuance of the Certificate of Occupancy;
- k. Structure of contract with the owner (e.g., design, build, finance, operate, maintain); specify the Private Entity's operation and maintenance obligations;
- l. Financial structure of partnership (e.g., equity, National 501c3, concessionaire, etc.) and type of debt (e.g., taxable, tax-exempt, etc.), if applicable;
- m. Any description of the financial impact to the University's credit and balance sheet
- n. For any developments that involve revenue sharing or profit splitting with the owner(s), a summary of the general financial arrangements with owner;
- o. All arbitration, mediation, or litigation that has arisen from each development contract, and the current stage of resolution of any of those items. For those items that have been concluded or resolved, the outcome of the arbitration, mediation, or litigation that was conducted.

Photographs of the completed project or if the project has not been constructed, architectural renderings of the project, should be included with each project description.

1.5 Required Submittals

Note: It is the sole responsibility of the Private Entity/Entities to submit information in fulfillment of the requirements of the ITN. If pertinent information or required submittals are not included within your Response, it may cause the Response to be rejected or have an adverse impact on evaluation.

1.6 Submission Instructions

Submittals for this RFQ must be delivered electronically by email to Andrea Cashell, Director of Procurement, at procurement@floridapoly.edu. The submission must be in PDF format.

Submittals must be received no later than 4:00pm ET on Monday, March 14, 2022, to be considered for this partnership opportunity. While the University will make every effort to ensure a smooth submission process, Private Entities are cautioned to account for Responses to this RFQ that arrive after the stated time may be rejected in the University's sole discretion.

Any questions concerning the ITN should be directed in writing to Andrea Cashell, (procurement@floridapoly.edu), Questions for the RFQ must be received by 4:00 PM ET on Tuesday, March 1, 2022.

1.7 Addenda

Any addenda or instructions issued by Florida Poly prior to the time for receiving Responses shall become a part of this RFQ document. Such addenda shall be acknowledged in the Response from the Private Entities. No instructions or changes shall be binding unless documented by a proper and duly issued addendum. The University is under no obligation to contact Private Entities for clarification but reserves the right to do so.

1.8 Disclaimer

The University reserves the right to request additional information, or clarifications of material submitted by Private Entities during the RFQ process.

Any representations or statements made within this RFQ shall not be considered a contractual obligation by the University and Private Entities shall not be entitled to rely upon them. The University reserves the right to reject any and all RFQ submittals and to identify and select the team(s) which the University, in its sole and absolute discretion, deems most qualified to advance to Stage 2 ITN process

The 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. Responses will become the property of the University.

Section V - EVALUATION, NEGOTIATION, AND CONTRACT AWARD

1.0 Evaluation Process

1.1 Evaluation Process

FLORIDA POLY’s evaluation of each submittal will be based upon the information provided, information obtained from references and independent sources, and formal presentations, if requested.

1.2 Respondent’s Acceptance of Evaluation Methodology

Submission of a submittal indicates Respondent’s acceptance of the evaluation technique and Respondent’s recognition that some subjective judgments must be made by FLORIDA POLY during the assigning of points.

1.3 Evaluation Criteria

Each submittal shall be evaluated on the ability to meet FLORIDA POLY’s requirements and to provide the best value to FLORIDA POLY. Submittal shall be evaluated by assigning points to each of the items below.

1.3.1 The Stage 1 evaluation will be based on the following criteria:

Criteria
Experience of Respondent Team’s Key Personnel
Respondent Team’s Technical Capability
Respondent’s Relevant Experience with Higher Education projects or similar facilities

1.3.2 The ITN (Stage 2) evaluation criteria will be provided to the Respondents invited to participate in Stage 2.

