STUDENT HOUSING
MARKET DEMAND STUDY

REQUEST FOR PROPOSALS

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I. INTRODUCTION

A. The Project
Humboldt State University, part of the California State University system, seeks proposals from qualified firms to prepare a Student Housing Market Demand Study. The goal of this Study is to identify demand for student housing for the next 10 years, including the type of housing spaces needed, and to provide recommendations and options to meet the identified needs.

B. The University
Established in 1913 as a normal school, Humboldt State University is located in the coastal city of Arcata, 275 miles north of San Francisco in a setting of majestic redwood forests, rivers, bays, lagoons, and mountains. The 144 acre hilltop campus is among the most beautiful in the state, and overlooks Humboldt Bay and the city of Arcata.

We offer a wide array of academic choices with 48 majors and 12 graduate programs in three Colleges. Faculty members are among the top teachers and researchers in their fields. Programs in the natural resources and sciences are nationally known, while visual and performing arts are also popular areas of study. Throughout the curriculum and co-curriculum, students find a long-standing commitment to social justice and environmental responsibility. Recent rankings include U.S. News & World Report “A Top Western University”, Princeton Review “Best in the West College”, Princeton Review “Green College”, President’s Higher Education Community Service Honor Roll, G.I. Jobs Magazine “Military Friendly School”, PETA “A Top Vegan-Friendly School” and Campus Pride “A Top LGBT-Friendly School”.

Led by President Lisa Rossbacher, the newly developed 2015-2020 Strategic Plan calls for the operationalization of four key strategic goals to begin in the 2015-16 academic year:

1. Prepare students to be socially and environmentally responsible leaders in a diverse and globalized world;
2. Foster meaningful relationships across differences, including diverse cultural communities, identities and competencies;
3. Strengthen partnership with local communities; and
4. Serve as effective stewards of the natural and built environment and the university’s financial resources with a focus on sustainability.
Students enjoy Humboldt State for the natural beauty surrounding campus, access to beaches and the stunning Redwood forests, and for the peace and quiet found in our rural setting. With a record high enrollment of 8,800 students in the Fall 2015 semester, current campus housing only allows 2,047 student bed spaces (about 23% of total students) which hampers both recruitment and retention efforts for the University. While 90% of first-time freshmen live on campus, our ability to house returning students and graduate students is extremely limited. In addition, the types of bed spaces available do not meet the programmatic needs of our on-campus student population. Student housing in the local town of Arcata is limited and many students experience difficulty finding appropriate housing off campus.

Humboldt State University, recently recognized as a Hispanic Serving Institution (HSI), attracts a majority of our student population (approximately 60%) from the more metropolitan areas of Los Angeles and San Francisco. The most recent entering first-time freshmen class (Fall 2015) was comprised of mostly First-Generation Students (52.4%) and Low-Income Students (56.0%), and 40.3% of that class were from historically underrepresented minority populations. To meet the needs of these students who travel up to 13 hours from home to attend HSU, we need to ensure that there will be adequate and appropriate housing available to them throughout their undergraduate experience.

C. About Housing & Residential Life at the University

The first residence halls at the University opened in 1923 in Nelson Hall (currently used as classroom and office space), followed by Sunset and Redwood Halls (“The Hill”) in 1959. The Jolly Giant Commons, which houses administrative offices and a residential dining facility was completed in 1968. The Canyon opened shortly thereafter and was soon followed by the Cypress Complex in 1973. With Creekview opening in 1995, the on-campus housing inventory was stable until the University acquired Campus Apartments in 2008 and completed the College Creek Apartments in 2010. Further description of each housing area is included below:

- The Hill (Redwood & Sunset Halls) are our traditional residence halls. Each building is three stories and houses approximately 228 students (456 beds spaces total) in primarily double rooms with a limited number of triple and single rooms, as well as a study area and TV lounge. There are also common kitchen, laundry and storage facilities in each building. The buildings are “L” shaped and face each other, forming a central “quad” which is used for recreational purposes.
- The Canyon consists of eight separate buildings and houses 445 students in suite-style arrangements. Each building has its own common study area, TV lounge, kitchen, laundry and storage facilities.
Creekview consists of four separate buildings which house 270 students in suite and apartment-style arrangements. Creekview has three living options: Option 1 is a five person suite with two double rooms and one single room; Option 2 is a six person suite with three double rooms; and Option 3 is a six person suite with two double rooms and two single rooms. Each apartment is equipped with a full kitchen, living room, dining area and bathroom. A common lounge/recreational facility is located in a separate fifth building in the area.

Cypress consists of a series of suites built up the slope of a hillside and houses 231 students in suite-style living arrangements. Each suite houses seven to twelve students and includes a living room, bathroom and small kitchen area with cooking facilities and a dining table. Common laundry facilities are also included. This area is also a central location for outdoor recreational activities for residents and features a basketball hoop, lawn and recreation area.

Campus Apartments is a single building housing 207 students in apartment-style living arrangements. Each apartment has two bedrooms with private entrances and bathrooms but which share an adjoining kitchen.

College Creek consists of four separate buildings and houses 461 students living in apartment-style arrangements. Each apartment includes single and double rooms housing four to six residents and features full dining and kitchen areas as well as one or two bathrooms. Common laundry facilities are also included in each building. A common lounge and marketplace are available in a separate fifth building in the area.

Through the facilities described above, Housing & Residential Life offers a range of living options including singles, doubles, and triples, in both traditional double-loaded corridor residence hall, suites, and apartments. Our facilities average 97% occupancy during the academic year, with a waiting list for Fall housing at opening for the past three years. Our housing portfolio has a maximum of 2,070 bed spaces, and of those 40 spaces are allocated to residence life staff for programmatic support. HSU does not currently require students to live on campus, although current research on HSU students by our Institutional Research and Planning Office found a significant positive effect on persistence for students that live on campus. The breakdown of bed spaces is as follows:

- Single Room Bed Spaces- 516
- Double Room Bed Spaces- 1,368
- Triple Room Bed Spaces- 186

Housing & Residence Life maintains two Faculty/Staff-In-Residence who live in First Year Housing areas (Sunset & Creekview) to support the academic success and persistence of First Year Students. The Office of Housing and Residence Life, in a focus on educating students, implemented a new Community Action Plan in the 2015-16 academic year that focuses student and professional staff action on creating communities founded on the principles of caring, open communication, Trust, Integration, Participation and Collective Responsibility. As a result, we have
seen programming numbers double when compared to the previous year and the number of conduct cases has been cut in half.

One key to the achievement of the University’s Strategic Plan, which includes emphasis on improving access and success for all students, is the availability of student housing to meet the demands of an Enrollment Management Plan which calls for small, planned growth over the next five years of about 1% per year, and the changing demographics of our student population.

II. PROJECT INFORMATION

A. Project Description

As stated in Section I, the University requests proposals from qualified firms to prepare a Student Housing Market Demand Study. Goals and objectives of this Study are fully outlined below as are the scope of services requested by the campus.

B. Goals & Objectives

The University has prioritized the following goals and objectives as critical for this project:

- Produce a market demand study which demonstrates whether or not there is need and/or demand for additional housing. The final report should include recommendations on the number and type of housing spaces needed to meet the demand, as well as recommended location for the additional spaces (on or off campus).
- Produce a ten year financial pro forma which addresses operational as well as capital improvement costs. This shall also include recommendations regarding a comprehensive housing rate structure.
- Ensure the study will meet the requirements of the California State University Housing Proposal Review Committee.
- Ensure that the study team considers the University’s enrollment projections when providing recommendations.

C. Scope of Services

The selected firm will be expected to, at a minimum, perform the following scope of services in relation to the Study requested:

- **Project Initiation**
  - Review existing housing documents and reports.
  - Meet with appropriate campus administrators.
  - Conduct visioning session with campus team (i.e., Vice President for Enrollment Management & Student Affairs, Vice President for Administrative Affairs, Associate Vice President for Facilities Management, Director of Housing & Residence Life).
  - Tour existing campus housing.
  - Identify housing objectives.
• **Data Collection & Analysis**
  o Provide an analysis of Housing and Residence Life’s financial position and Humboldt State’s financial position with regards to our ability to meet the California State University capital planning requirements.
  o Provide an analysis of and comparison to peer institution housing programs.
  o Consultant to review and incorporate university provided student demographic information.
  o Conduct an analysis of current off-campus housing market including demographic data by census tract and/or zip code in the vicinity of the campus. Include review of other data sources necessary to project future off-campus housing supply.
  o Review and analyze historical enrollment data by class level, age, county of origin, number of enrolled units, and other relevant components of university enrollment.
  o Review and assess existing student housing facilities in terms of meeting programmatic and space needs as well as summarizing by building type, cost, location, and vacancy rates.
  o Conduct a comprehensive assessment, including a survey instrument and focus groups, to determine housing preferences among students and parents including, as a minimum, the type, cost, and location of housing as well as desired amenities.

• **Final Report**
  o Develop a report summarizing findings and recommendations based on the completion of tasks detailed above, including identification of the recommended level of housing development (both the number and type of on campus housing and the potential for HSU involvement with the off campus housing market through public/private partnerships or other lease arrangements). Recommended on-campus developments should specifically identify the type, cost and location of proposed housing. Recommended off-campus developments should specifically identify the type and location of such as well as recommended financing or leasing arrangements and potential cost of such. Both types of recommendations should include a statement about Housing and Residence Life, and Humboldt State University’s, ability to finance projects when considering state requirements for finance and capital planning. All recommendations must relate to the results of the demand and supply analysis.
  o Develop a ten year financial pro forma which addresses operational as well as capital improvement costs and which includes recommendations regarding a comprehensive housing rate structure.

**D. Preliminary Schedule**
The current schedule desired by the University includes the following milestones:
• July 1, 2016: Issue RFP
• July 22, 2016: Optional Pre-Proposal Meeting
• July 27, 2016: Last Day for Written Questions to be Received
• August 5, 2016: Proposals Due
• August 19, 2016: Shortlist of Proposers Announced
• September 5-9, 2016: On Campus Interviews
• September 16, 2016: Notice of Intent to Award Announced
• October 14, 2016: Agreement Executed
• October 17, 2016: Notice to Proceed Issued & Study Underway
• January 27, 2017: Draft Study Due & Review by University
• February 24, 2017: Final Study Submitted & Presentation to University Complete

E. California State University Guidelines & Reference Standards
The following guidelines and reference standards as adopted by the California State University System shall be referenced and utilized for the development of this study:
• Housing Proposal Review Committee Information & Process (http://www.calstate.edu/FT/Hous/HousingIndex.shtml)
• Housing Proposal Review Committee Market Demand Study Checklist (http://www.calstate.edu/FT/Hous/HousingIndex.shtml)

III. PROPOSAL REQUIREMENTS
To be responsive, a Proposal must be submitted in the format identified below. Responses must be clearly identified for each of the requirements listed below. The proposal shall adhere to the following format for organization and content ensuring the maximum number of pages for each requirement (as communicated below) is adhered to.

Request for Proposals are comprised of two parts. Part I is the Request for Proposal document. Part II, referred to below, is the Schedule of Values and Cost Proposal.

Part I: Provide five identical bound Request for Proposal documents printed on letter size paper and two sets of electronic files (thumb drive). The following information shall be included in this order:

• Cover Letter (1 page): Provide a cover letter that references the RFP and confirms all elements of such have been reviewed and understood including explicit acknowledgement of addenda, if any. Include firm’s legal name and contact information for single point of contact at office to be assigned responsibility for this project. Provide name, title, and signature of corporate officer authorized to bind the firm contractually.
• Table of Contents (1 page)
- **Qualifications of Key Personnel (up to 6 pages):** Identify the professional qualifications and licensing/certification of the firm’s assigned key personnel, specifically including the following:
  - Identifying by name and title key staff members to be assigned to manage or otherwise play a major role(s) in this project and their assigned role.
  - Identify and provide the qualifications of any sub-consultants proposed to be used on this project; clearly explain their role and the extent of involvement expected.
  - Address the reasoning behind the selection of key staff members and sub-consultants and indicate the extent to which the individuals have previously worked together on similar projects.
  - Identify the total number of years of experience providing similar services for University projects including those within the California State University system, if any.
  - Identify any specific or special qualifications or those of your proposed sub-consultants which would benefit this project.

- **Experience of the Firm (up to 8 pages):** Identify the firm’s experience preparing student housing market demand studies. Include a narrative of at least five similar market demand studies that include: 1) client name and contact, 2) brief description of the project and scope of services provided, 3) initial and final project schedule, and 4) firm’s personnel assigned and role. If applicable, include at least one description demonstrating successful experience working within the California State University system on a project of a similar nature. Do not include any projects not directly relevant to qualifications for this project.

- **Approach (up to 6 pages):** Explain your intended approach to the project including the specific tasks required for each of the major elements identified in Section II.C, and how your team will approach such in order to achieve the goals and objectives of the project. Identify the responsible individual who will lead the work with the University for coordination and execution of the services. Include information related to your firm’s intended approach to successful user group/stakeholder interface, intended relationship with identified University project leadership, and expected roles of each of the key personnel.

- **Organizational Chart (1 page):** Provide an organizational chart showing, at a minimum, the key personnel to be assigned to this project and their reporting relationship within the firm. Include sub-consultants proposed to be used and how their role specifically relates to and functions within the organizational chart.

- **Quality Control & Schedule (up to 6 pages):** Identify how your firm will ensure performance through adequate management, supervision, review and control. Explain the key schedule constraints and milestones for the scope of work. Clearly indicate on-campus activities including personnel involved and expected duration. Propose a schedule of specific activities resulting in project
completion which meets the University’s anticipated schedule identified in Section II.D.

**Part II:** In a separate, unmarked, and sealed envelope, please submit the following documents:
- Firm Billing Rates
- Sub-consultant Billing Rates
- Schedule of Values Form (Appendix 3)

**IV. SELECTION CRITERIA & EVALUATION PROCESS**

**A. Shortlist Selection Criteria**
The selection committee will screen and rate all Proposals received. Ratings shall be based on, but not limited to, the following criteria:
- Qualifications of the Firm and its Proposed Sub-consultants
- Experience of the Firm and its Proposed Sub-consultants
- Approach toward Successful Delivery of the Scope of Services Requested and Achievement of the Project Goals & Objectives
- Quality Control & Schedule
- Fee

**B. Evaluation Process**
The evaluation process will be conducted in three stages. The first stage is associated with review of Phase I documents, the second with review of Phase II documents and the third and final stage is associated with an on-campus interview. The process utilized at each stage is further described below:

**First Stage**
A University selection committee will conduct an initial evaluation of Phase I documents associated with each Proposal. Phase 1 documents will be reviewed based on the criteria noted above. The evaluation process will consider all requested information. The opinion of the Committee is final.

Each criterion will be scored based upon the pre-determined point system described below:
- Cover Letter ................................................... 0 points
- Table of Contents .......................................... 0 points
- Qualifications ................................................. 20 points
- Experience ..................................................... 30 points
- Approach ....................................................... 20 points
- Organizational Chart ..................................... 5 points
- Quality Control & Schedule ............................ 25 points
- TOTAL POINTS ................................................ 100 points
Second Stage
Once total points are determined for each Proposal, the selection committee will open Phase II documents associated with each Proposal. Each firm’s total proposed cost will then be divided by the total points awarded for Phase I documents. Such will provide the Committee with an evaluation based on total cost per point which is considered to be a best value approach toward selection of qualified consultants. The opinion of the Committee is final.

Third Stage
Following review of all Proposals received, the University will invite up to the top three rated firms to an on campus interview after which a final selection will be made. It is expected Proposers will ensure personnel assigned to the project and judged to by the Proposer to best represent the firm regarding all content within the proposal and the proposed project will be present for the on campus interview. It is expected that on campus interviews will take place in September 2016.

Interviews will be conducted in the Jolly Giant Commons at Humboldt State University. It is anticipated that interviews will be scheduled for one and a half hours utilizing the following format:
- Consultant Presentation, 60 minutes
- Questions & Answers, 30 minutes

Firms selected to interview shall be prepared to discuss the following:
- Project Understanding
- Project Approach
- Proposed Team & Experience
- Proposed Schedule & Quality Control
- Proposed Fee Cost Allocation & Cost Management
- References for Similar Projects

Upon completion of interviews, and evaluation thereof, a preferred finalist will be determined and further evaluation may be necessary, including reference checks, before the Committee approves selection of a proposing firm. The opinion of the Committee is final.

The University reserves the right at its sole discretion to reject all proposals, to waive non-material defects and to limit the number of proposal teams selected for an interview.

V. FEES & CONTRACT
A. Contract Documents
The contract utilized for this project is the California State University Architect/Engineer Agreement (Appendix 1) which also includes the following
documents: Rider A- Scope of Work (Appendix 2), and Schedule of Values Form (Appendix 3). The California State University System Office of General Counsel prevents these agreements from being modified.

B. Fees
The fee for services shall be negotiated. Firms shall propose lump sum fees, to be paid monthly, in arrears, based on “percent complete” rather than “hours expended” for each item listed in the Schedule of Values Form (Appendix 3). Invoices, itemized based on the adopted schedule of values, shall be submitted to the University’s designated design manager.

VI. PROPOSAL LOGISTICS
A. Questions
Questions regarding the Request for Qualification should be directed via email to: A. Gail Dungan, Buyer, Humboldt State University, Office of Contracts, Procurement & Risk Management at (a.gail.dungan@humboldt.edu). Both the question and the answer to all substantive inquiries will be posted on the University’s Procurement website (http://www2.humboldt.edu/risksafety/node/78). Deadline for inquiries is one week prior to the due date for submission of qualifications.

B. Optional Pre-Proposal Meeting
All firms intending to submit proposals are invited to attend an on-campus pre-proposal meeting. University staff will present overall study goals, answer questions and lead a comprehensive tour of the existing housing and residence life facilities.

The meeting will be held at 9:00 A.M. on July 22, 2016 at the Jolly Giant Commons located on the Humboldt State University campus. A campus map can be downloaded at: http://www.humboldt.edu/humboldt/maps.

Complimentary parking permits can be arranged by requesting by July 20, 2016. Requests should be directed to Krista Chalker at (707) 826-4111 or via email at krista.chalker@humboldt.edu.

C. Submission Instructions
Proposers are directed to submit five (5) copies, at least one of which shall be identified as original and shall contain original signatures, and two electronic (thumb drive) copies of your Firm’s Proposal on or before 3:00 p.m., August 5, 2016. In a separate, unmarked, and sealed envelope, please submit your firm’s billing rates, your sub-consultant’s billing rates and a completed Schedule of Values Form that conveys the proposed fee associated with the study.
Please direct your submissions to:

A. Gail Dungan
Contracts, Procurement & Risk Management
Humboldt State University
Student Business Services Building
1 Harpst Street
Arcata, CA 95521

No facsimile or electronic responses will be accepted. Proposals received after this time will not be accepted. Missing information will be considered non-responsive and submittals may be rejected.

VII.  REFERENCE INFORMATION

The following documents are provided as reference information associated with the Study.

- Campus Map (Appendix 4)
- Student Housing Market Study, Ira Fink & Associates, November 2013 (Appendix 5)
- Student Housing Project Site Study, SKA Associates, July 2014 (Appendix 6)
- HSU Enrollment Management Projections, Vice President for Student Affairs & Enrollment Management (Appendix 7)