

Request for Expression of Interest
For
Private Sector Partners to Expand Off-Campus Student Residences

Request for Expression of Interest No.: **CM19-01**

Issued: **October 10, 2019**

Submission Deadline: **November 14, 2019 at 15:00 local time**

1. Introduction

The purpose of this Request for Expression of Interest (REI) is for Brock University to assess the interest and capacity of the private sector and potentially identify partner(s) to provide new student residence. Upon selecting any partner(s), it is anticipated that further negotiations regarding any potential partnership will occur with final decisions subject to Board of Trustees approval.

The issuance of this REI is not to be considered in any way a commitment by Brock University, nor as authority to potential respondents to undertake any work that could be charged to Brock University. This REI is not to be considered as a commitment to award contract(s) for the work described herein or issue subsequent processes.

Submission of a response to this REI or participation in a meeting is not intended to, nor does it, create any contractual or other legally binding obligation or duty, including any obligation or duty to accept or reject information, to enter into negotiations or decline to enter into or continue negotiations, or to award or decline to award a contract. Participation in this REI and the submission of a response to this REI is not a pre-condition to participation in a subsequent commercial process, if any.

2. REI Timetable

Issue Date of REI	October 10, 2019
Deadline for Questions and Requesting Partner Meeting	November 3, 2019 at 12PM local time
Deadline for Addenda	November 7, 2019 at 12PM local time
Submission Deadline	November 14, 2019 at 3PM local time

The REI timetable is tentative. It may be changed by Brock University at any time, and Brock University may choose to waive or extend the Deadline for Questions, Deadline for Addenda and/or the Submission Deadline.

Partner Meeting Request

The University will entertain individual partner meetings prior to November 3, 2019 with potential partners that can demonstrate a history operating and/or building student residence or similar. A decision to accept a meeting request will be at the sole discretion of the University.

For more information or to schedule a meeting, please contact Chuck Maclean, Director Procurement, at (905) 688-5550 x3746 and refer to "REI CM19-01".

3. Background

We are looking to potential private sector partners to be creative while developing solutions for meeting our student residence needs, including student experience expectations.

Our priority ask is for potential private sector partners to illustrate and describe in their response to this REI how they are aligned with and take into consideration the University's vision, mission, strategic priorities and guiding values in any proposal (Appendix B).

We highlight that the University grew by 873 students to 19,867 students going into September 2019 and is forecasting growth of 13% by September 2024. Currently we are in the process of building a new first year student residence on campus to accommodate 308 additional students.

Our student residence focus in this REI is upper year (second year to graduate) student residence on non-university owned lands near the Sir Isaac Brock Way campus (see area defined in Appendix C) and the Marilyn I. Walker School of Fine and Performing Arts (see area defined in Appendix D).

Information on current residence, including floor plans and pricing for first year (generally 8-month residence) and upper year residence (generally 12-month residence) can be found on our residence website at: <https://brocku.ca/residence/>

3.1 Residence Requirements

Recognizing our desire to allow potential private sector partners a significant degree of flexibility in their submission we provide the following comments and ask that any submissions identify and describe how your organization has experience with and can follow through on the following:

A. Design

Our preference is to create student residence with a minimum of 100 beds. The spaces within the residence need to support a safe (integrating campus security), relaxing and collaborative environment while minimizing and/or eliminating any long-term maintenance requirements of the University. The inclusion of common area spaces for students is a preference, institutional (i.e. classroom or research related) and commercial space opportunities may be appropriate depending on location and design. We remain open to new design, including floor plans and look to potential private sector partners to present and utilize leading practices. Any proposal for design should complement University architecture and the surrounding area. Our expectation is accessibility standards will be met and exceeded.

B. Operational

Our preference is a partnership that includes the University responsible for operating and integrates our residence life program, administration (including registration and billing/collection processes), and security operations with existing departments within the University to support meeting student experience expectations. These activities would be compensated through the agreement. Alternative models will be considered, if proposed.

C. Partnership Structure

We are looking to potential private sector partners to identify their preferred and any alternative partnership structures they would like the University to consider. We anticipate partnership proposals may range from straight bed leases that could share occupancy risk and revenues to joint venture opportunities that may include the University contributing capital and/or participating in the construction process. In the event the University participates in the construction process, proponents should anticipate the University purchasing policy will need to be applied. The University's preference is to minimize exposure to construction and future maintenance risk. Our preference is that any submission containing a lease arrangement be limited to 10 years, non-renewable. If the partner and the University desired to renew the lease a new agreement at the end of 10 years would be required.

D. Timeline

Our expectation is any agreement would result in a student residence capable of occupancy by July 31st of a given year with rents starting to be charged on September 1st of that year. It is anticipated that some or all residences would be available by July 31, 2022.

E. Site Visit

Brock University may wish to visit or inspect proposed locations and/or premises upon reasonable notice. Brock University's Design Standards (BUDS) should be used as a guideline with deviations noted.

The BUDS document can be found at:

<https://brocku.ca/facilities-management/wp-content/uploads/sites/84/BUDM-Design-Standard-Final-Effective-180904.pdf>

4. Information Requested

Information provided with the submission should include responses to the residence requirement and the following:

- A response to support why the private sector partner and the University would be a good fit to work together today and in the future? How does the private sector partner and the University's values, mission, strategic priorities and guiding values align?
- Evidence of partners financial sustainability and commitment to the broader community.

- Information on a proposed location, including history and summary of known particulars.
- Information on the proposed residence building including illustrative proposed configuration (room / amenities) and design (interior / exterior).
- Proposed proforma and rental rate model (including estimated capital and operating assumptions)
- Information on the preferred partnership model including the identification of responsibilities and risks held by the private sector partner and the University. These can be shared risks or individual risks.
- Information on proposed timeline.

5. REI Contact

For the purposes of this process, the REI Contact will be Chuck Maclean, Director Procurement, at (905) 688-5550 x3746 and refer to “REI CM19-01”

Respondents should direct any questions on this REI process to the same REI Contact.

6. Submission Instructions

6.1 Submission Location

Respondents are asked to submit their information and signed Respondent Submission Form by 3PM November 14, 2019 in PDF format via email to Chuck Maclean; cmaclean@brocku.ca

Email submissions should have the following subject line: “REI #CM19-01”

6.2 Timing of Submission

Submissions should be submitted at the location set out above on or before the Submission Date.

6.3 Requested Information

Responses should include a completed and signed Respondent Submission Form (Appendix A) that acknowledges, among other things, that this REI and any respondent submissions will not create a legal relationship or obligation.

Appendix A – Respondent Submission Form

1. Respondent Information

Please fill out the following form, naming one person to be the respondent's contact for the REI process and for any clarifications or communication that might be necessary.	
Full Legal Name of Respondent:	
Any Other Relevant Name under which Respondent Carries on Business:	
Street Address:	
City, Province/State:	
Postal Code:	
Phone Number:	
Fax Number:	
Company Website (if any):	
Respondent Contact Name and Title:	
Respondent Contact Phone:	
Respondent Contact Fax:	
Respondent Contact Email:	

2. Terms of Reference

In responding to this REI, the respondent acknowledges its acceptance of the following REI Terms of Reference:

a. Request for Expression of Interest Not a Formal Competitive Bidding Process

This REI is issued for information-gathering purposes and is not intended to be a formal legally binding "Contract A" bidding process. Without limiting the generality of the foregoing, this REI will not necessarily result in any subsequent negotiations, direct contract award, invitational tendering process or open tendering process, and does not constitute a commitment by Brock University to enter into an agreement.

b. REI Not to Limit Brock University's Pre-existing Rights

This REI will not limit any of Brock University's pre-existing rights. Without limiting the generality of the foregoing, Brock University expressly reserves the right, at its discretion, to:

- (i) seek subsequent information or initiate discussions with any potential party, including potential parties that did not respond to this REI;
- (ii) initiate direct negotiations with any potential party, regardless of whether the potential party or parties responded to this REI;
- (iii) contact a limited number of potential parties, which may include only those that responded to this REI or may include potential parties that did not respond to this REI;
- (iv) use the information provided through this REI, or any other information which may come to its attention, in a subsequent Request for Proposals; and/or
- (v) elect not to proceed with an agreement that is the subject of this REI.

These expressly reserved rights are in addition to any and all other rights of BROCK UNIVERSITY that existed prior to the issuance of this REI.

c. Financial Information for General Information Purposes Only

Any financial information provided by respondents is for general information purposes and is not intended to be binding on respondents. Any legally binding agreements will be established through the execution of a written agreement(s).

d. Accuracy of Responses

The respondent acknowledges that the information provided is, to the best of its knowledge, complete and accurate.

e. Information in REI Only an Estimate

Brock University and its advisers make no representation, warranty or guarantee as to the accuracy of the information contained in the REI or issued by way of addenda. Any quantities shown or data contained in this REI, or provided by way of addenda, are estimates provided only as general background information.

f. Parties to Bear Their Own Costs

Brock University will not be liable for any expenses incurred by a respondent, including the expenses associated with the cost of preparing responses to this REI. The parties will bear their own costs associated with or incurred through this REI process, including any costs arising out of, or incurred in, (i) the preparation and issuance of this REI; (ii) the preparation and making of a submission; or (iii) any other activities related to this REI process.

g. Submissions Will Not Be Returned

Except where set out to the contrary in this REI or expressly requested in the respondent's submission, the submission and any accompanying documentation provided by a respondent will not be returned.

h. Confidential Information of Brock University

All information provided by or obtained from Brock University in any form in connection with this REI either before or after the issuance of this REI (i) is the sole property of Brock University and must be treated as confidential; (ii) is not to be used for any purpose other than replying to this REI; and (iii) must not be disclosed without prior written authorization from Brock University.

The respondent may not at any time directly or indirectly communicate with the media in relation to this REI without first obtaining the written permission of Brock University.

i. Disclosure of Information

The respondent consents to Brock University's collection of information as contemplated under the REI for the uses contemplated under the REI. Respondents should not include information in their response that is proprietary or confidential. Information provided by a respondent may be released in accordance with governing laws, including but not limited to the *Freedom of Information and Protection of Privacy Act*, RSO 1990, c F.31 (*FIPPA*). To the extent that a respondent does include confidential or proprietary information, the respondent should identify any information in its submission, or any accompanying documentation supplied in confidence for which confidentiality is to be maintained by Brock University. The confidentiality of such information will be maintained by Brock University, except where an order by a tribunal or court requires Brock University to do otherwise, or as required by statute, including but not limited to *FIPPA*. The respondent consents to the disclosure, on a confidential basis, of this submission by Brock University to advisers retained by Brock University for the purpose of reviewing this submission.

The respondent acknowledges that Brock University may make public the name of any and all respondents.

j. Governing Law

This REI process will be governed by and construed in accordance with the laws of the province of Ontario and the federal laws of Canada applicable therein.

Signature of Witness

Signature of Respondent
Representative

Name of Witness

Name of Respondent Representative

Title of Respondent Representative

Date

Appendix B

Brock University Vision, Mission, Strategic Priorities and Guiding Values

University Vision

Brock University will be a dynamic, comprehensive university of choice for students that is known globally for making a positive difference in the communities that comprise Brock, the Niagara region, Canada and the world through leadership, innovation and excellence in teaching, learning, discovery, creativity and the application of knowledge across disciplines.

University Mission

Brock flourishes through the scholarly, creative and professional achievements of our students, faculty and staff. Although we share a common purpose, we recognize and honour knowledge pursued through diverse perspectives and approaches. Our academic mission is to nurture and support our students and faculty in the discovery of knowledge through exemplary scholarship, teaching and service. We provide undergraduate, graduate and professional education of the highest quality. Our graduate programs enhance Brock's growing reputation for excellence in teaching, research, creativity and innovation. We provide a transformative experience for our students inside and outside the classroom by helping to develop their full potential as educated and engaged citizens in local and global communities. Brock graduates go out into the world as leaders, with a track record of entering fulfilling careers across all disciplines. Brock University works to enhance the economic, social, cultural and intellectual lives of the communities around us – Niagara, Ontario, Canada and globally – and to demonstrate the vital ways in which we contribute to the well-being and betterment of society in the 21st century.

University Strategic Priorities

The Institutional Strategic Plan establishes four strategic priorities, along with associated goals and action items, to advance Brock's vision over the next seven years. These priorities focus the University community on fulfilling and strengthening our mission as an engaged and comprehensive university through:

Strategic priority: Offer a transformational and accessible academic and university experience. To be a destination of choice for undergraduate, graduate and part-time students, we must ensure an academic and university experience that positively transforms our students' abilities, understanding and impact on the world. We teach future-ready students and equip lifelong learners with a zest for knowledge, skills and competencies that will enable them to achieve their full academic, professional, career and life potential. Core to our student experience is the development of engaged citizens who are resilient, involved, career-ready and versatile.

Strategic priority: Build research capacity across the university Our research focus is central to our identity. Brock will invest in building a world-leading research institution that is grounded in scholarly excellence and strong graduate and post-graduate programs. We will leverage our strengths within and across disciplines to enhance research impact.

Strategic priority: Enhance the life and vitality of our local region and beyond Brock is committed to working with the communities in Niagara, Ontario, Canada and the world. Through local and global connections, we increase opportunities for the residents of Niagara. By responding to the needs of society and supporting its growth and development, we strengthen community vitality and vibrancy.

Strategic priority: Foster a culture of inclusivity, accessibility, reconciliation and decolonization At Brock, we believe that a diverse and welcoming learning community is built upon the foundation of exceptional students, faculty, staff and alumni. This requires that Brock be attractive and welcoming to people of all identities and accepting of the unique histories and experiences of Indigenous people within the Canadian setting.

Our strategic priorities set the University on the path towards greater national and global recognition for its engagement and relevance to students and communities through enhanced innovation and excellence in teaching, learning, discovery, creativity and the application of knowledge across disciplines.

GUIDING VALUES AND STRATEGIC PRIORITIES⁽¹⁾



⁽¹⁾ The colours in the graphic include Brock's brand standards and those from the Indigenous Medicine Wheel, the Pride Flag and the Dish with One Spoon Wampum Agreement Flag.

Appendix C

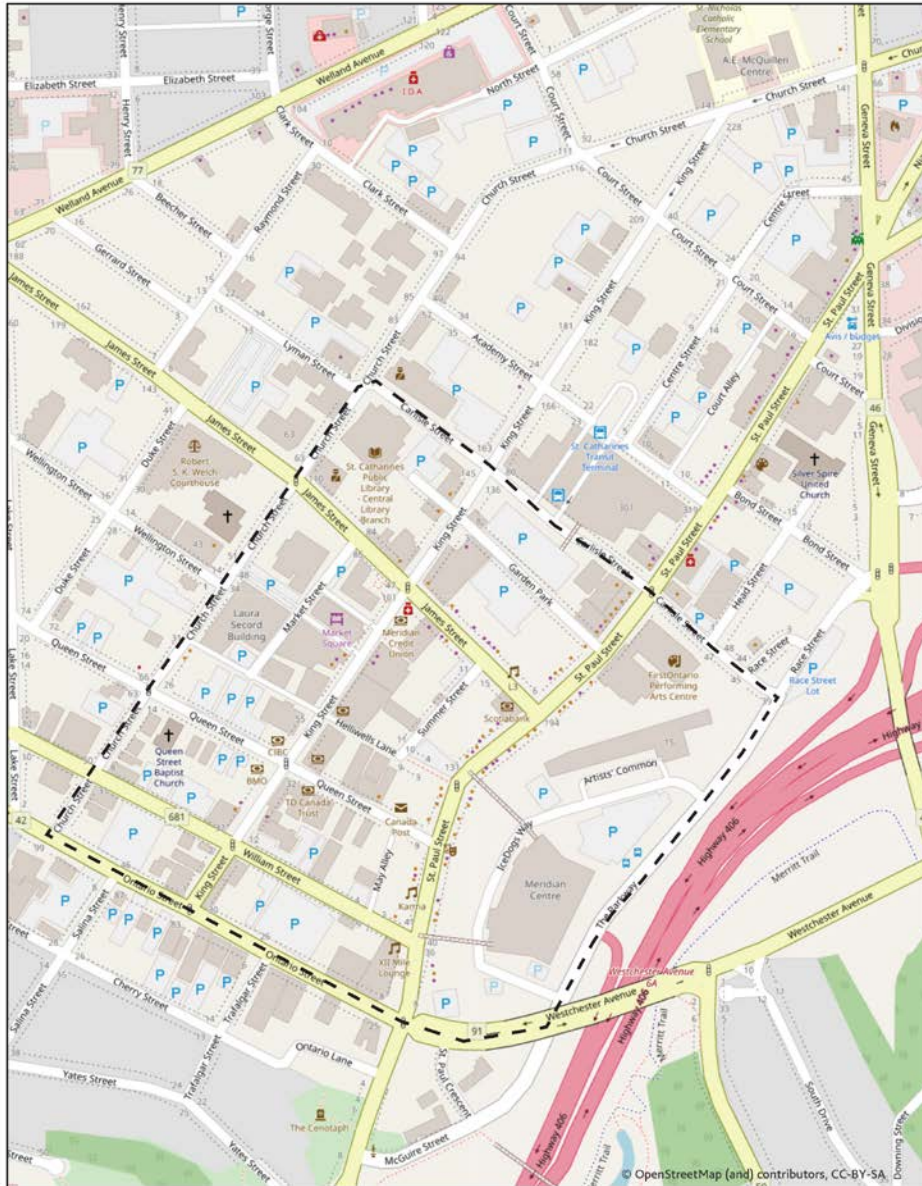
Areas near Sir Isaac Brock Way



Note: For this appendix only. The preferred location includes the area within the dotted lines. While Brock University property is included within the dotted lines our preference in this REI is to consider partnerships on non-Brock University property at this time.

Appendix D

Areas near MIWSFPA



Note: For this appendix only. The preferred location includes the area within the dotted lines and on either side of the road (where applicable) where the dotted lines are drawn.