

Workshop Proposal Sample #2

Presentation Title: Develop a Campus Master Plan RFQ/RFP that Ensures Concise, Responsive and Cost Competitive Submissions for Your Campus

Proposed Length: 7 hours

Session Abstract:

Your chances of a successful campus master planning process are greatly enhanced by tailoring your Request for Proposal (RFQ/RFP) to the institutions unique environment, values and decision-making culture. Responding to positive feedback from our SCUP-38 concurrent session, this session provides the requested in-depth step-by-step process to prepare a state-of-the-art 3rd generation campus planning RFQ/RFP.

Workshop participants arrive having completed a pre-planning assessment questionnaire that solicits the status of current initiatives (i.e. strategic, academic, technology, facilities capital and financial planning). At the full-day workshop, a series of mini-lectures introduce the language, expertise and tools, scope of services, deliverables options and costs for each planning phase. Each min-lecture is followed by small group interactive session where individuals align their campus planning efforts to their institutions needs, values, financial resources and time-frame constraints. Participants return to their campus with the knowledge and tools to both facilitate development of a concise campus planning RFQ/RFP and solicit competitive submissions.

Why the preconference workshop (as opposed to a 60-minute concurrent session) is best for presentation of the chosen topic:

Feedback for our well attended SCUP-38 concurrent session discussion and follow-up evaluation summaries suggest that though it provided an excellent overview, a longer interactive workshop format would allow all participants to fully engage in the level of detail required to address their unique needs and questions. A three-ring notebook is utilized to provide reference resources, RFQ/RFP outline formats, procedures and agendas, topics fill in the blank forms and feedback forms. The general format will consist of a 20-minute topic mini-lecture followed by breaking into groups of 3-4 individuals for 20-minutes to compare perspectives and formulate strategies for their respective campuses. Facilitators will support this activity to ensure active listening and provide guidance as needed. A 20-minute re-gathering of the group to share issues and solutions and allow participants to complete their handbook fill in the blank forms follows the small group sessions. Workshop format is designed to facilitate interaction and bonding among participants during the workshop and provide a resource network for them after the conference.

Description of the relevance of the topic to the core knowledge base of planning to cutting-edge or emerging planning issues, or to the conference theme:

Full Day Option B (7 hours) is the preferred module given our initial approach. However, should attendance be below 12 participants, our experience suggests that Option A (5 hours) would still permit full participation by all attendees. If the workshop session is as well received as the SCUP-38 concurrent session version, the format and team could be expanded along the lines of the successful SCUP Space Planning Workshop series.

Describe the value and implications of this topic for planning practice:

Value:

To remain competitive, institutions must successfully manage change on an on-going basis. Institutions of higher education periodically engage outside consultants to assist them in campus master planning. Selecting a planning firm is typically the result of issuing a Request for Qualifications/Proposal (RFQ/RFP). There is no one campus planning RFQ/RFP that fits the expectations of all institutions. The chances of a successful master planning process are greatly enhanced by tailoring the RFQ/RFP to each institutions unique environment, values and decision-making culture. Drawing on recent case studies at over 40 institutions, the session will highlight insights on how to fashion an innovative RFQ/RFP that results in a planning process using the best methods suited to the unique needs and resources of a campus.

Implications:

The primary focus audience is the college and university senior staff responsible for, or considering, organizing and managing an upcoming comprehensive campus master planning effort on their campus. Secondly, the workshop will attract college and university professional planners and consultants who have expressed an interest in developing a common vocabulary, communication format and deliverables in a mutually collaborative environment.

Provide a detailed presentation outline, including each major topic and the proposed time frame for each segment:

Introductions & Mutual Expectations (20 minutes) [All]

A. Campus Master Planning Overview (60-minutes)

Mini-Lecture: 3rd Generation Campus Planning Methodology

Small Groups: Share Individual Pre-Planning Assessment Status

Re-Group: Explore commonalities and distinctions of individual situations; identify potential pre-planning needs and strategies to maximize institutional readiness for the planning process.

(15 minute break)

B. Campus Planning Phases (Possible Breadth & Depth / Expertise & Tools / Resources &

Cost Implications) (60 Minutes) [Rob]

1.0 Mini-Lecture: Existing Conditions Assessment Phase

External Campus Environs Scans

Demographics/Economic Profiles

Transportation & Traffic

Land-use, Zoning & Regulatory

Environmental

Campus Perimeters and Arrivals

Town-Gown Issues (e.g., Economic Initiatives, Off-Campus Student Housing and Parking, Safety, Tax Base, Community Services and Politics)

Internal Campus Environs Scan

Topography, Vegetation, Wetlands, Easements, etc.

Campus Edges & Arrivals

Signage & Wayfinding

Circulation & Parking

Campus Landscape & Site Amenities

Potential Site Development Sites

Acquisition & Disposition of Land

Remote or Multi-Campus Issues

Facilities Assessment (Site & Buildings & Utilities)

Documentation Format and Software Options

Deferred Maintenance Breath & Depth

Hazardous Materials

Establishing Costs & Priorities

Facilities Operating Budgets

When You Need Additional Expertise

Surveyor

Traffic Engineer

Hazardous Materials Inspectors

Environmental Scientist (Assessment/Approval)

LEED Certification (Sustainable Development)

2.0 Small Groups: Share Individual Assessment Issues

3.0 Re-Group: Explore commonalities and distinctions of individual situations; identify potential pre-planning needs and strategies to maximize institutional readiness for the planning process.

C. Space Program & Goal Setting Phase (60 Minutes)

1.0 Mini-Lecture: Space Planning Overview

1.1 Communicating the Academic Plan

1.2 Facilities Space Planning Issues & Methodologies

HEXIS Standards & Terminology

Peer Benchmarking

Projecting NASF Based on FTEs/Headcounts/WSCH

Classroom Utilization Analysis

Projecting Space Needs

Reconciling Calculated & Perceived Needs

1.3 Information Technology Implications

Conducting Internal Scan

Identifying Major Issues

State-of-the-Market

Aligning Goals to Budgets

Complementing On-Campus IT Expertise

(60-minute lunch break)

D. Concept Development + Implementation Plan Phases (60-minutes)

Mini-Lecture: Implementation Plan Overview

Concept Development Methods & Documentation

Implementation Phase

Project Costs Methods (Hard & Soft Costs)

Project Packaging (Groups, Sequence, Priorities, Duration & Cost)

Establishing Implementation Plans (By Year or By Thresholds)

Specifying Flexible Planning Tools You Can Use

Periodic Plan Updates

2.0 Small Groups: Share Individual Implementation Issues

3.0 Re-Group: Explore commonalities and distinctions of individual situations; identify potential pre-planning needs and strategies to maximize institutional readiness for the planning process.

E. Maximizing Communication & Acceptance (60 Minutes)

Mini-Lecture: Communication Methods

Campus Planning Committee Structure Options

Benefits of a Pre-Contract Orientation Meeting

Ensuring Campus-Wide Participation

Questionnaires & Surveys

On-Line Communication

Planning Charrettes

Establishing Goals & Objectives

Facilitating Consensus

Focus Groups

Trustee Presentations / Acceptance

Documentation Format Requirements

Final Report/Presentation Format Options

2.0 Small Groups: Share Individual Communication Issues

3.0 Re-Group: Explore commonalities and distinctions of individual situations; identify potential pre-planning needs and strategies to maximize institutional readiness for the planning process.

(15 minute break)

F. RFQ/RFP Format (60 Minutes) (Bob + Michael]

Mini-Lecture: RFQ/RFP Format Overview

1.1. Request for Qualifications (RFQ)

Outline Format & Procedure

Documentation to be Provided

Soliciting Qualified Teams

Pre-Submission Campus Orientation Meeting/Tour

Documenting Subsequent Questions

Vetting Process to Short List

1.2 Request for Proposals (RFP)

Pre-Interview Visits

Distribute Additional Documentation

Communicating Your Fee Range

Contract Terms & Conditions

Short-Listed Firm Interview Procedures

Selection Committee Criteria & Methodology

2.0 Small Groups: Share Individual Issues

3.0 Re-Group: Explore commonalities and distinctions of individual situations; identify potential pre-planning needs and strategies to maximize institutional readiness for the planning process.

G. Wrap-Up (30 Minutes)

Summary Conclusions [all]

Confirming Networks & Next Steps

Evaluations

Adjournment

What are the "take-home" materials you will provide participants:

Participants in this session will:

Learn to identify and prioritize an institutions unique campus planning needs and then match these to available campus planning services.

Understand the time and financial resources required by the breath and depth of these different planning services.

Appreciate what consultants really need to know regarding available documentation and data sources.

Learn how to use the provided RFQ/RFP checklist to solicit from the leading campus planning firms proposals suited to the needs and conditions of the campus.

Take a completed notebook providing the how-to enabling participants to develop, manage and facilitate an up-coming campus master plan RFQ/RFP process that solicits competitive responses appropriate to the campuss unique situation.

Establish a network of like-minded individuals at other institutions to foster mutual support and resource sharing.

Four (4) keywords:

Campus Planning; RFQ/RFP; Planning Tools; Consultants

Audiovisual requirements:

Standard: 1-data projector (800x600 resolution)Other: 2 Easels & Post-It-Pad Easels Pads

Presenter names and expertise have been omitted from this proposal sample.