

REQUEST FOR PROPOSALS

Vermont State University Master Plan

Vermont State Colleges d/b/a Vermont State University

ISSUED BY

Vermont State Colleges d/b/a Vermont State University

APPLICATION DEADLINE

February 24, 2023, 3:00pm ET

APPLICATION INSTRUCTIONS

Email PDF versions of all documents to Michael.Stevens@vsc.edu by the deadline, using the following naming convention:

- **Email Subject Line:** RFP Vermont State University Master Plan
- **Organization Approach and Personnel Qualifications:** Applicant_Name_RFP_Vermont State University Master Plan _Qualifications.pdf
- **References:** Applicant_Name_RFP_Vermont State University Master Plan _References.pdf
- **Fee Proposal:** Applicant_Name_RFP_Vermont State University Master Plan _Fees.pdf

QUESTIONS REGARDING THE RFP

Questions regarding this RFP may be directed to Vermont State University, Manager of Transformation Projects and Planning at Michael.Stevens@vsc.edu. For fastest response please enter Vermont State University **Master Plan Services RFP Question** in the subject line of your message. All questions must be submitted by February 14th, 2023, 4:00pm ET. Answers will be provided by February 17th, 2023, 3:00pm ET, and will be available on www.vsc.edu/rfps.

Contents

SYSTEM OVERVIEW AND BACKGROUND..... 3

SCOPE OF WORK..... 4

QUALIFICATIONS 8

EVALUATION..... 8

GENERAL CONDITIONS 9

CONFIDENTIALITY..... 10

SUBMISSION REQUIREMENTS 11

SYSTEM OVERVIEW AND BACKGROUND

The [Vermont State Colleges System](#) (VSCS) is currently comprised of four member institutions; [Castleton University](#) (CU), the [Community College of Vermont](#) (CCV), [Northern Vermont University](#) (NVU)¹, and [Vermont Technical College](#) (VTC). Across all four institutions, the system educates over ten thousand students each year, while employing over three thousand. In the Spring of 2020, the system graduated over eighteen hundred students into the workforce with certificates and degrees.²

The VSCS is currently undergoing a significant transformation, with the guidance of the Governor, Legislature, the Board of Trustees, and the State's *Select Committee on the Future of Public Higher Education in Vermont*. The VSCS began working on internal transformation in the Summer 2020 with the [VSCS Forward Task Force](#) and several institutional tasks forces including [NVU Strong](#) and [VTC's Transformation Advisory Team](#). As part of the overall system transformation of higher education in Vermont a significant merger of CU, NVU, and VTC is occurring. These three institutions will merge under one institution Vermont State University, <https://vermontstate.edu/>, on July 1, 2023. The finalization of this merger is one component of a multi-phased transformation approach to right-size and transform higher-education institutions in Vermont.

The newly established Vermont State University (VTSU) will be comprised of five unique campus locations in Castleton, Johnson, Lyndon, Randolph, Williston, which totals just over 2.2 million square feet. In addition, the VTSU encompasses smaller leased locations such as the Killington living, learning and working site, as well as eight commuter-based learning sites located in the following locations:

- Bennington
- Berlin
- Brattleboro
- Middlebury
- Newport
- St. Albans
- Rutland
- White River Junction

The VTSU also has a significant virtual presence through a fully online learning platform.

While the merger represents a significant milestone on the transformation journey, the overall transformation will be iterative and take place over multiple years and phases. The VSCS is amidst a five-year transformation which reform and revolutionize our business model. As part of

¹ Northern Vermont University was created on July 1, 2018 from the merger of Lyndon State College and Johnson State College.

² [VSCS Sourcebooks](#) as well as [Board & Committee Meeting Materials and Minutes](#) are available on the System's website.

this transformation the system is evaluating physical assets across all its campuses. We are seeking proposals from contractors to create a master plan for physical assets which will move us from current state to future state based on comprehensive data, analytics, and metrics to determine the appropriate footprint necessary to support the work of the multi-campus VTSU.

The contractor will need a skilled and experienced team that will evaluate a complex set of information and data including return on physical assets, with consideration to quantitative and qualitative data – as well as factoring in social and economic considerations of the individual location, space utilization, the program array, facilities conditions assessments, along with a full evaluation of our aging campus utility infrastructure to determine how to most effectively reshape the campus physical space to support the new University.

SCOPE OF WORK

The VSCS seeks a contractor to lead our new institution through a master planning process. Sub-contractors may also be utilized but proposals should identify a prime contractor.

The primary focus of this scope will be to build a strategic plan of capital projects and investments over a defined timeline that work to optimize our efficiency and promote the educational experience of our existing and future students. This road map will be created by methodically establishing a Master Plan that prioritizes strategic investments to provide the best returns and financial sustainability required to ensure the prosperous future of the institution. The plan should also incorporate and recommend strategies for the sizable deferred maintenance facing the current physical assets. VTSU understands and expects that our campuses will be different, maintaining a level of individuality and vibrancy expected by their micro-communities. The plan shall incorporate this individuality but also maximize efficiency and align with our long-term strategic goals and priorities. Furthermore, the plan must be based on sound analysis of the data and visionary thinking that aligns with the creative educational model being implemented.

This scope of work will be taking place at the same time as many other complex change initiatives are being evaluated and implemented. Given that fact VTSU intend to take a phased approach to the services being procured withing the RFP. The chart below outlines the deliverables and corresponding deadlines within this scope of work:

Deliverable:	Expected Delivery:
Utility Master Plan	November 15, 2023
Draft Master Plan	November 15, 2023
Final Master Plan	September 1, 2024

Additional information related to these three deliverables are included in the **SERVICES REQUESTED** portion of this RFP.

In support of this master planning effort, many foundational components have been completed and are available now to familiarize firms about our current state and future objectives. Works available now include:

- A Return on Physical Assets study (ROPA)
- Facilities Condition Assessments (FCA)
- Space Utilization Study
- Defined Academic Program Array addressing physical location and modalities offered
- A break down of each campus by building, square footage and assigned use
- Vermont State University Mission and Vision
- Unique campus identifiers
- Virtual Campus Tours

A link to the aforementioned documents is available in Dropbox at this location:

<https://www.dropbox.com/scl/fo/qk15kow4x88045r7zz88r/h?dl=0&rlkey=d0fwt257krjg9pvt8c979f10n>

To access these files, please copy and paste the hyperlink into your browser.

Additional work that will be ongoing and help inform the **Final Master Plan**

- Strategic Plan
- Enrollment projections
- Updated program array information
- Residential Life predictions
- Student Life and Athletic program offerings

The selected firm will provide, at minimum, the following services:

- 1) A **Comprehensive Utility Master Plan** for the 5 primary campuses. This scope is to include the main campus utility infrastructure and does not pertain to specific buildings unless a portion of the building contains components of the campus wide infrastructure. Examples include a boiler plant that supports more than the individual building; a main IT that supports the campus infrastructure; a building that contains the water pumps to the domestic water service for the campus; etc.
 - a. The utilities included in this scope are storm, sewer, domestic water, steam, electricity, and telecom/fiber optics.
 - b. A complete on site, existing condition assessment should be completed at each location. The existing conditions are to include a defined scale for understanding the existing quality of each system, the expected useful life of the system and how much useful life is still expected out of each system at each location.
 - c. Propose the future options that should be considered at each location based on the preliminary outcomes of the master plan. Proposed options should consider the first-time cost, the long-range maintenance cost, the future costs of energy and the need to dramatically improve our carbon footprint.
 - i. Option proposals should clearly identify the pros and cons associated with the options proposed as well as the degree of financial risk associated with the proposed options as they related to varying utility costs.

- ii. Option proposals should come with comprehensive total project cost estimates that reflect the current market conditions and highlight any opportunities or incentives related to specific infrastructure investments.
 - 1. The contractor shall lead a robust stakeholder engagement process garnering the input of local utilities and other stakeholders. This process shall include virtual and in-person meetings over the course of the plan development. Facilitate meetings as required.

2) A **Master Plan** for the 5 primary campuses with deliverables broken out into:

Draft Master Plan, to which the contractor shall:

- a. Attend a minimum of one, three-day site visit to familiarize the team with the 5 primary campus locations
- b. Coordinate and lead meetings as required to facilitate the development of the Master Plan.
 - i. The vendor will assist in defining the scope of those meeting to achieve the deliverables. Some likely topics will be:
 - 1. Leadership updates
 - 2. Questioning and understanding the data supporting the Return on Physical Assets
 - 3. Questioning and understanding the data supporting the Space Utilization Study
 - 4. Questioning and understanding the data supporting the Facilities Condition Assessments
 - 5. Understanding assumptions regarding future enrollment and other revenue sources
 - 6. Understanding the impacts of the Program Array
 - 7. Understanding the future of Residential and Student Life offerings
- c. Evaluate each physical space based on its overall carrying cost, ability to be efficiently utilized and the cost to achieve that efficient utilization to achieve our identified academic mission and vision.
- d. Utilize the comprehensive data set (Return on Physical Assets, Facilities Conditions Assessments, Space Utilization Study, Campus building and square foot breakdown, the outcomes of the Utility Master Plan, enrollment projections, Program Array with location and modality considerations, etc.) as the basis of the evaluation.
- e. Identifying a list of assumptions based on established metrics, data, and other tangible information to which this plan is based.
- f. Deliver a report titled "Draft Master Plan" including:
 - i. A comprehensive list of the existing properties. Identify which properties should be invested in and make recommendations as to what investments will enhance our educational offerings, promote campus vibrancy and ensure economic stability. Additionally, identify key properties to consider repurposing. This could be in the form of sale, lease, public/private partnership, razing or other.

- g. Present this report via a zoom meeting to VTSU Leadership.
- h. Solicit feedback on the draft report and incorporate edits as necessary.
- i. Present Report to Vermont State Colleges Board of Trustees.

Final Master Plan, to which the contractor shall:

- j. Evaluate all feedback received from various parties regarding Draft Master Plan outcomes.
- k. Identify focus areas that need greater understanding and present challenges or appear to offer the most opportunity to produce desired outcomes.
- l. Lead a robust stakeholder engagement process, garnering input both internal and external stakeholders that are impacted by, rely on, or utilize the physical environments of our various campus settings or whom have a vested interest in the physical environment through their connection to the campus community at large.
- m. Coordinate meetings as required with leadership intended to clarify challenges and gain detailed insight regarding opportunities. Some likely topics:
 - i. More detailed analysis of enrollment projections
 - ii. Understanding evolution and direction of new institution through integration of the Strategic Plan
 - iii. Better identify projects that enhance our academic offerings and achieve enhanced efficiencies
- n. Deliver a report titled "Final Year Master Plan" including
 - i. A comprehensive list of the existing properties. Identify which properties should be invested in and make recommendations as to what investments will enhance our educational offerings, promote campus vibrancy and ensure economic stability. Additionally, identify key properties to consider repurposing. This could be in the form of sale, lease, public/private partnership, razing or other. Provide a full project cost, at the conceptual level. There should be an estimate for all identified opportunities. The estimating should be done by a firm that has a long-standing history of providing accurate project cost estimates at a conceptual level.
 - ii. Conceptual projects, if any, to enhance and align this work with the outcomes of the Strategic Plan. All conceptual projects will be accompanied by a full project cost, conceptual level, estimate.
 - iii. Include the identified assumptions and project outcomes formulated from the program offerings, campus locations, modalities delivered, athletic portfolio and others as determined through the course of this work.
- o. Present this report via a zoom meeting to VTSU Leadership.
- p. Request and take comment to amend report based on VTSU Leadership feedback.
- q. Amend report as needed based on feedback.
- r. Present report to VSC Board of Trustees.
- s. Provide support to VSC in its presentation of the report to the State of Vermont Legislature as requested.

QUALIFICATIONS

Firms must have a minimum of five (5) years demonstrated experience and expertise in the successful work associated with this RFP of similar size and scope distributed across a large geographic area.

EVALUATION

Responses will be evaluated on firms approach to the services to be provided, firms experience, the individual experience of proposed team members, schedule, and fee.

Selection Process

The selection process will be to evaluate the proposals based on the Method of Award below and select a short list of firms to participate in a formal interview where they will have a chance to further explain their engagement methodology and vision for the evolution and completion of the project.

Method of Award

VSCS will evaluate each proposal to this RFP on its demonstrated competence, compliance, format, cost, and enterprise applicability using the criteria described below. This includes, but is not limited to, product availability, quality, prices, service availability, timing, and delivery. The purpose of this RFP is to identify those vendors having the interest, capability, and financial strength to supply the VSCS with comprehensive campus master planning advising, consultation and documentation. If the VSCS does not identify a suitable bidder within the RFP process, the VSCS is not obligated to award the project to any bidder.

The VSCS, in its best interests, reserves the right to accept or reject any or all proposals, to accept or reject any item or combination of items therein, to waive any irregularities or informalities in any proposal or items therein, and/or to negotiate with particular bidders following the evaluation of proposals without right of recourse by other bidders. A top proposal would be assessed in the judgment of VSCS as best complying with all considerations set forth in this RFP. When VSCS has tentatively selected a successful proposal, VSC may engage in discussions with the bidder to formulate plans in greater detail, to clarify unclear items for either party, and to otherwise complete negotiations prior to formal selection.

Evaluation Criteria

Approach: How does the firm describe the approach that will be taken to accomplish this work? How does that approach compare to the needs of the VSCS?

Firm's Experience: How does the proposal show that the prime and various sub consultants have the experience to perform the scope of services indicated?

Individual Experience: How qualified are the individuals proposed to provide various services including the relation of their roles and specific experience to the scope of services.

Schedule: How does the firm’s schedule reinforce the approach? Is the schedule realistic? Does the the firm's schedule indicate a clear understanding of the work and effort it will take to accomplish the scope.

Fee and hourly proposal: The detailed breakdown of cost and hours per deliverable for both the prime and subconsultants

Scoring

CRITERIA	WEIGHT	MAXIMUM PONTS	WEIGTED TOTAL
Approach	2	10	20
Firms Experience	1	10	10
Individual Experience	2	10	20
Schedule	2.5	10	25
Fee	2.5	10	25
Total			100

GENERAL CONDITIONS

1. This RFP does not commit the Vermont State Colleges System to award a contract.
2. This RFP and the process it describes are proprietary to the VSCS and are for the sole and exclusive benefit of the corporation. No other party, including any Applicant, is granted any rights hereunder. Any response, including written documents and verbal communication, by any Applicant to this RFP, shall become the property of the VSCS and may be subject to public disclosure as described in the Confidentiality section, below
3. Submission of a proposal indicates acceptance by the Consultant of the conditions contained in this RFP, unless clearly and specifically noted in the proposal submitted and confirmed in the contract between Vermont State Colleges System and the chosen Consultant selected
4. Responses shall be binding upon the chosen Consultant and irrevocable for up to 60 days following the close of applications

5. From the release date of this request for proposal until award of the contract, no contact with Vermont State Colleges System personnel or board members related to this solicitation is permitted. Direct all communications to the designated contact on the first page of this request.
6. The Vermont State Colleges System reserves the right to:
 - a. Request clarification and additional information from any Consultant during the evaluation process
 - b. Negotiate with the chosen Consultant to include further services not identified in this RFP
 - c. Re-advertise with either an identical or a revised scope of work or cancel requirements in their entirety
 - d. Issue subsequent RFPs based on refinement of concepts proposed in response to this request
 - e. Conduct investigations of the qualifications of the Applicant as deemed appropriate
 - f. Request the Applicant modify the submitted proposal to more fully meet the needs of the Vermont State Colleges System

CONFIDENTIALITY

The Vermont State Colleges System complies with the Vermont Public Records Act, 1 VSA § 315 *et seq.* which requires public agencies to allow any person to inspect or copy any public record upon request. Accordingly, applicants for this RFP are hereby advised that any communications, data or other information received by the Vermont State Colleges System during the RFP process could be subject to a public records request. However, certain public records are exempt from public inspection and copying, as set forth in 1 VSA § 317(c), including, for example, those portions of a record which meet the statutory definition of a trade secret. Accordingly, consultant should submit a second copy of their proposal, from which any portion of the proposal that the consultant reasonably believes to be exempt from disclosure under the Public Records Act has been redacted. By submitting a proposal, you indicate that you understand the requirements of this section and the potential applicability of Vermont's Public Records Act to your proposal.

SUBMISSION REQUIREMENTS

All submissions are due no later than February 24 , 2023, 3:00pm ET.

In three (3) separate documents, to be named as outlined on Application Instructions page, please provide the following:

1. **Organization Approach and Personnel Qualifications:** Provide a statement of qualifications and capability to perform the services sought by this RFP, including:
 - a. Provide a comprehensive outline as to how your firm intends to provide the services and outcomes identified below.
 - b. Provide a detailed schedule of activities to achieve each phase of this RFP.
 - c. Provide 3 or more well-defined examples of work that you have collectively accomplished. Be clear in regards to what services were provided by the various sub consultants that are included in this team. It may take more than three examples to highlight work of this complexity for all proposed subconsultants.
 - d. Qualifications and experience for personnel working on this engagement including skillset (described in detail), experience level, and job title. Relevance with similar projects should be cited along with the level of effort expected for this engagement.
2. **References:** Provide examples of work and references from three to five clients performing work of similar complexity. In each reference include the following:
 - a. Project name and description including primary project scope, description of complexity, communication, and project plan
 - b. Duration and size of project
 - c. Name of company
 - d. Project sponsor name, telephone number, and email address
3. **Fee Proposal:** Provide a fee proposal with the following break out.
 - a. Provide a project total cost by deliverable: Utility Master Plan, Draft Master Plan, Final Master Plan. This is a fixed cost contract.
 - b. Provide a total hourly break down for each phase for the prime consultant and any sub consultants.
4. **Redacted Copy:** Provide a second copy of the proposal, redacting any portion of the proposal that is reasonably believed to be exempt from disclosure under the Vermont Public Records Act.

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