

DATE: February 13, 2025

SUBJECT: **Request for Proposals (RFP) - Planning Team Selection**
University Park Campus Master Plan
University Park, PA
PSU Project Number: 001002400

TO: **Arcadis**
Cooper Robertson
Gensler
NBBJ
Page
Perkins&Will
Sasaki
SmithGroup

PART 1: PROJECT INFORMATION AND REQUIREMENTS

The Pennsylvania State University (Penn State, PSU) is excited to continue the Planning Team selection process for a master plan for its University Park Campus. This Request for Proposals (RFP) seeks to identify potential providers of the above-mentioned services.

The Selection process is as follows:

- Proposals from the teams are due at Noon, Eastern Standard Time (EST), **March 17, 2025**.
- The Screening Committee will choose three firms from the RFP respondents. Firms will be notified of the short-list results and interview notice by the end-of-day, **April 10, 2025**.
- On **May 16, 2025**, in-person interviews will occur at the University Park Campus. This date will not change, so please plan accordingly. Also, Non-Binding Fees for the entire A/E Team are due just before the in-person interviews.
- A fee proposal is not required for this RFP. Interviewing teams will complete a PSU Non-Binding Fee Form, emailed to Penn State **the day before** interviews.

Participation in this A/E Team selection process is voluntary and at no cost or obligation to PSU. PSU reserves the right to waive any informality in any submissions and reject any submission or portion thereof. PSU reserves the right to modify dates as is necessary.

PROJECT BACKGROUND

Penn State is a historic Land Grant institution with an enrollment of 88,000 full and part-time students and twenty-four properties across the Commonwealth. The University Park Campus is the oldest and largest campus in Penn State's system, with approximately 7,000 acres, 600 buildings, and which includes over 20 million gross square feet. There are approximately 49,000 students and 16,000 full-time faculty and staff.

The purpose of this planning effort is the development of a Comprehensive and Strategic Campus Master Plan (Master Plan) for Penn State's University Park Campus (UP). Building upon the physical framework established during the last campus-wide master planning effort in 1999 and its update in 2005, the Master Plan must take into consideration the many new developments, district-level studies, and various planning efforts that have occurred since its conception.

PROJECT DESCRIPTION AND GOALS

Penn State seeks the assistance of a professional planning services firm with an integrated team of sub-consultants to provide comprehensive planning services for the development of the University Park Campus Master Plan. The last master plan was completed in 1999 with minor updates in the following decades. Since that time, Penn State has continuously engaged in diverse component and smaller-scale planning efforts related to specific campus districts, academic programs, system needs (such as transportation), etc. Penn State is seeking a consultant that will integrate these planning efforts to ensure a cohesive development strategy that builds toward an inspiring and sustainable future. This process will also require significant stakeholder engagement, which will help Penn State coalesce around near-term, high-impact capital investments that will advance key strategic plan initiatives.

A primary goal of the master plan is to align with the university's academic, research, and community outreach missions, and assess how potential changes will affect campus facilities and infrastructure. Additionally, the Master Plan will evaluate how recent shifts in higher education—such as changes in teaching methods, technology, and funding models—may impact the University Park Campus. Penn State will collaborate with the selected team to finalize an appropriate scope for the master plan.

This effort will be coordinated through the office of Planning, Design and Properties at the Physical Plant and will require broad engagement with campus faculty and staff stakeholders. The planning team will need to respond to the goals outlined in the academic strategic plan which is nearing completion and will be shared with the Penn State Community in early 2025 (<https://strategicplan.psu.edu>). The vision for the strategic plan states: *“To elevate Penn State’s standing as a world-class institution, our Strategic Plan will help us to transform the educational experience for our students, cultivate a welcoming community where everyone feels proud to be a Penn Stater, embolden our world-class research, champion health care and deliver on the promise of our land-grant mission.”*

Recent campus plans will be used to support this planning process. All public planning documents are found here at <https://www.opp.psu.edu/campus-planning-resources>:

- 2024 Sustainable Landscape Implementation Plan
- 2024 Bicycle Master Plan
- 2023 Transportation Master Plan
- 2021 Student Affairs Facilities Master Plan
- 2019 College of Engineering Master Plan
- 2014 Libraries Facilities Master Plan
- 2011 College of Arts and Architecture Master Plan
- 2008 Eberly College of Science Master Plan

PROJECT FOCUS AREAS:

Although no scope is outlined in this RFP (finalized scope will be determined with the input from the selected team), it is anticipated that the following focus area will be included in the master plan:

1. **Quantitative Space Analysis:** Evaluate the current space allocation by comparing existing benchmarks related to space usage with aspirational targets in academic, administrative, and student areas. This analysis should determine if the current allocation meets both present needs and future goals, particularly considering projected enrollment growth and alignment with the Strategic Plan.
2. **Qualitative Space Analysis:** Propose tools for student outreach to find gaps of services and gaps in campus locations that enrich the student experience on campus. Understand different student profiles and how they use the campus facilities.
3. **Framework for Renovations vs. New Construction:** Develop a framework to guide Penn State in deciding whether to renovate existing buildings or invest in new construction. Additionally, this framework should provide guidance on deferred maintenance versus capital renewal of existing facilities and total cost of ownership of different construction types.
4. **Physical Campus Improvements:** Additional enrollment creates pressure on existing streets and sidewalks. Consider improvements to the system of outdoor spaces, such as greenways, walkway connections, and plazas.
5. **Student-Centered Spaces:** Create a physical environment that supports students' personal growth, engagement, and leadership outside the classroom. Determine the appropriate support spaces (office, student life, health, and wellness, etc.) for proposed enrollment growth. Additionally, formulate a proper bed count and dining commons space on campus.
6. **Other Campus Systems:** The master plan will incorporate information from a wide breadth of university stakeholders:
 - a. Meet with university engineers to understand ongoing upgrades and phasing to campus utility systems aligned with carbon reduction plans.
 - b. The master plan team will coordinate with Penn State's Office of Transportation Services to include long-range goals of parking strategies and Transportation Demand Management (TDM) programs.
 - c. The master plan will include other studies and plans, such as the recent Bicycle Master Plan and the Sustainable Landscape Implementation Plan.
7. **Campus Precinct Planning:** Review and study of existing campus locations for mobility and green space improvements as well as consideration for expansion needs.
 - a. Atherton Street Corridor
 - b. West Campus
 - c. Nittany Apartments and Millenium Lawn Area
 - d. Hastings Road Area
 - e. Big Hollow Road and Tower Road Area

RFP SUPPORTING INFORMATION AND LINKS

- **Form of Agreement.** Included is the link to our Form of Agreement 1-P: [The Owner's "Form of Agreement 1-P"](#). Please review this agreement to ensure that your firm accepts all terms and conditions as written. In submitting a proposal for this project, you acknowledge that you concur, without exception, with all terms, conditions, and provisions of Form of Agreement 1-P.
- **Design Phase Deliverables.** Reference this document under the heading *00 51 00 MISCELLANEOUS FORMS* at the following link:
<https://oppwiki.atlassian.net/wiki/spaces/OPPDCS/pages/5409499/Division+00+-+Procurement+and+Contracting+Requirements?preview=/5409499/5407947/OPP%20Design%20Phase%20Deliverables.pdf>
- **Office of the Physical Plant (OPP) Standards.** This website provides information regarding specific design submission requirements and standards of the University. The University is willing to consider recommended exceptions to OPP standards due to the project type. Any such exceptions would need to be formally approved, in writing, by PSU OPP.
<https://oppwiki.atlassian.net/wiki/spaces/OPPDCS/overview>
- **OPP High Performance Standards.** The University has a commitment to environmental stewardship with a focus on university and campus-wide carbon reduction and total-cost-of-ownership. Our projects require maximum consideration of potential sustainable and energy-efficient designs and specifications for architectural, site, utility, structural, mechanical, electrical, and plumbing disciplines. Refer to the following link for the University's high-performance standards that exceed building code minimum requirements:
<https://oppwiki.atlassian.net/wiki/spaces/OPPDCS/pages/5409436/01+80+00+PERFORMANCE+REQUIREMENTS>

A part of this is PSU's High-Performance Building Design Standards: Building projects shall comply with ASHRAE Standard 90.1 Energy Standard for Buildings 2010 version AND as superseded by more stringent requirements of ASHRAE Standard 189.1 Standard for the Design of High-Performance Green Buildings, 2011 version. This standard defines a minimum requirement of LEED Certified for this project. The project will consider additional sustainability or high-performance measures and innovations.

PART 2: PROPOSAL REQUIREMENTS

Deliver eleven (11) hard copies of the Proposal to (note that this address has changed):

*Neil Sullivan, CFP, AICP, PLA, LEED AP
The Pennsylvania State University
135 Physical Plant Building
University Park, PA 16802*

Send a digital copy (PDF) of the Proposal to nsullivan@psu.edu and rrl144@psu.edu by the submission deadline. Include the name and email address of your team's main contact for the selection process within your submission. The entire submittal should be submitted as one (1) file. Please do not submit

individual documents or sections separately. If a file sharing service, such as Dropbox, is used, the file must be able to be easily downloaded without creating a login.

Hard copy and electronic submissions of the Planning Team's Proposal are due by Noon Eastern Standard Time on **March 17, 2025**.

- Proposals received after this date and time may be automatically rejected.
- Proposals shall be provided in an 8.5"x 11" format.
- Limit submission to forty-six (46) single-sided pages maximum (23 double-sided), plus a two-page maximum cover letter. Double-sided printing is encouraged—10-point font type minimum. Covers, a cover letter, and separating tabs shall not count toward the page limit.

A cover letter shall be provided from the proposed leader of the Prime (contract holding) Planning Team. The cover letter should be two-page maximum. The cover letter should include at least the following:

- Legal name of the Prime Planning Team.
- Contact information for the Planning Team's primary point of contact (name, address, phone, and email)
- A concise summary as to why the Team is best suited for this project
- Statement of certification that all information provided in the submittal is accurate

Collate and bind proposals according to the following Proposal Sections:

Proposals shall follow the format below, to ensure that all pertinent information necessary for evaluation is included and easily comparable by the Selection Committee. **The cover letter, table of contents, and divider pages will not count towards the RFP page limitation.** We encourage teams to be as brief as possible without sacrificing accuracy and completeness.

Note 1: As applicable throughout the Proposal, provide professional credit to architectural partners (including design architect, architect of record, academic/planning partners) for all projects discussed within the Proposal and for all project images shown.

PROPOSAL SECTION 1 – TEAM STRUCTURE

- A. Identify the entire proposed Planning Team**, including Prime (Contract Holding) firm, Lead Design firm (if different), architectural partners (as applicable), landscape and engineering firms, academic/space planning consultants, and proposed specialty consultant firms.
- Identify the roles and sharing of project responsibilities for all firms involved.
 - Provide insights into the firm's unique qualifications, characteristics, firm personality, design ethos, philosophy, client notations of previous project success, etc.
 - For each firm, identify the firm differentiators, size, qualifications, and experience on similar projects, and identify each firm's role in this project.
 - Identify past collaboration between prime firm and key consultants, including the number/value of projects and the key consultants' added benefit to the Team. It is encouraged to create teams that demonstrate previous successful collaboration and execution of projects like this one.
 - While we appreciate firms with experience at Penn State, we do not have a preferred vendor list and encourage the selection of high-quality consultants.

- B. **Provide team organizational chart.** Include all firms and consultants and provide the name and role of key team members. Clearly identify which team members are designated for leadership positions on the Team. Please highlight Diverse Business Enterprise Program (DBE) representation on the Team. Refer to RFP Section 2.F., below.
- C. **Provide role descriptions and resumes of key team members identified in the Organizational Chart.**
- a. Include registrations/certifications, educational background, years of experience, and relevant project experience.
 - b. Relevant project experience should include project size/cost, program type, project overview, and define each team member's role on each project listed on their resume.
 - c. Emphasize each team member's most relevant experience and ideally highlight that the team member has had comparable roles on similar projects.
 - d. Include at least two client references for each key team member. If possible, please avoid using Penn State employees as references.
 - e. Include resumes for all key team members. If individuals serve multiple roles, identify multiple roles on Organization Chart and resumes.

PROPOSAL SECTION 2 – TEAM QUALIFICATIONS

- A. Provide a summary of the qualifications and expertise of the firms with specific emphasis on:
- a. Design Excellence, including national recognition and distinguishing factors of team.
 - b. Experience delivering programs and/or projects of similar scope, scale, and complexity. **(See Note 1 above)**
 - c. Expertise in delivering a master plan for large higher-ed institution. **(See Note 1 above)**
- B. **Identify no more than six (6) and no fewer than three (3) projects, in order of most relevant to least relevant within approximately the last ten (10) years, that BEST exemplify the qualifications and expertise listed above for the proposed Team.**
- a. Include a brief description of each project, project budget, final project cost, and project completion date.
 - b. Show illustrative representation of the example projects, particularly those highlighting the work of the Team's proposed project leader.
 - c. Identify services performed by your firm as prime or subconsultant.
 - d. (Optional) If necessary, discuss any of the example project(s) that are highly relevant to our project in more detail. Include insights into what made these project(s) successful, including how those design intentions were translated into a meaningful and synthesized/successful solution.
 - e. Provide a reference from the Client and any other stakeholders (with current phone numbers) familiar with your performance on each of the above projects.
- C. **Project Relevancy Matrix.** Develop a matrix that illustrates the similarities between the example projects and this project. Please be as specific to our project as possible.
- D. **People-Projects Matrix.** Develop a matrix to show the participation of key individuals on the proposed Team from the example projects. List individual's role on example projects.

- E. **Diverse Business Enterprise.** The Pennsylvania State University is committed to advancing diversity, equity, and inclusion. Therefore, all teams are encouraged to include at least one (1) certified DBE design professional firm as part of their team. In addition, if the proposing firm itself is a current Diverse Business Enterprise, the firm should state that fact in its Proposal. Below is a partial list of acceptable certifying agencies:
- a. Department of General Services Bureau of Small Business Opportunities (DGS BSBO) or comparable state agencies or regulating bodies in other states or local jurisdictions.
 - b. Federal Department of Transportation
 - c. National Minority Development Council (NMSDC) or its affiliates
 - d. Southern PA Transportation Authority (SEPTA)
 - e. Women Business Enterprise National Council (WBENC)
 - f. Pennsylvania Unified Certification Program (PA UCP)
 - g. National Women Business Owners Corporation (NWBOC)
 - h. Minority Business Enterprise Council (MBEC)
 - i. National Gay and Lesbian Chamber of Commerce (NGLCC)
 - j. U. S. Department of Veteran Affairs (VOB/SDVOB)
- F. List the Errors & Omissions insurance coverage limits of the lead/prime entity of the Planning team. In addition, provide information on errors and omissions claims in the last (7) seven years.
- G. Acknowledge the review and acceptance of the attached 1-P Form of Agreement, ensuring that the Planning Team accepts all terms and conditions as written. In submitting a proposal for this project, the Planning Team concurs, without exception, with all terms, conditions, and provisions of this Form of Agreement.

PROPOSAL SECTION 3 – PROJECT APPROACH AND SCHEDULE

- A. **Describe the Planning Team’s proposed design approach for this project.** Explain any unique aspects to how your team will manage the creation of this master plan. Explain successes of how the project lead(s) have managed similar efforts. Include specific examples used in other projects your team has been involved with and how each team member will be used. Also include specifics of what will be needed from the university for this project to be successful.
- Project visioning and project mission/goal setting. And the Team’s approach to establishing a design process that works to achieve the project vision and goals.
 - Additionally, describe any programming/building planning tools, benchmarking tools, and/or other firm-specific methodologies to assist in the design of our project.
- B. **Approach to project delivery.** At least, describe the Planning Team’s overall approach to:
- Achieving the project schedule.
 - Identifying key risks to the project schedule and strategy for mitigating such risks.
 - Planning, managing, and executing the project.
- C. **Approach to Stakeholder Engagement.** Explain your team’s approach to community and stakeholder engagement. Include specifics related to technologies and methodologies that will be used. Explain tactics the team has used to help gain the needed perspective from each

engaged group, respond to issues and efficiently make decisions that keep this project on schedule

- D. **Unique Approach or Tools.** Provide any information that may serve to differentiate the firm from other firms in suitability for the project, including any services or approaches that may be particularly relevant to this project. Provide evidence of the firm’s fit to the project and/or needs of the Owner, any special or unique qualifications for the project. Provide evidence of experience and proficiency with campus planning within the areas of space planning, transportation, energy, environmental, projections or other related topics.
- E. **Project Staffing/Workload.** Verify the entire Planning Team’s availability to successfully staff the project immediately, given our project schedule and other team members’ workloads.
- F. **Graphic Schedule.** Create a graphic project schedule showing phase durations, owner engagement, review periods, and identifying critical path items, milestones, and schedule drivers. Explain opportunities that could shorten the schedule and what the associated pros and cons may be. Explain critical decision points and potential obstacles, based on past experience, to achieving the desired schedule. This can be formatted on an 11x17 (fold-out) and will only count as a single page.

PROPOSAL SECTION 4 – PROJECT-SPECIFIC KEY DRIVERS AND IDEAS

- A. **Project Understanding and Insights.** Recognizing that no specific scope of work has been provided, please discuss your general understanding of the assignment and approach to the issues outlined in this document. What did you and your team learn from the other institutions and assignments with Penn State or its academic peers, and how might that apply to the University Park Campus? Please also include a discussion of your team’s perception of high-quality planning in higher education and of Penn State, using specific examples from your other projects.
- B. **Provide initial ideas, thoughts, or considerations regarding our specific project.** We are not seeking design solutions. We would rather see the Team convey its “design thinking” or unique insights regarding our project. Considerations may include thoughts/opinions related to:

SCHEDULE

The University will use a qualifications-based team selection process with a longlist, shortlist and team interviews as follows:

RFP Responses Due	March 17, 2025
Shortlisted Teams Notified	April 10, 2025
Campus Tour for Shortlisted Teams	April 22, 2025
In-Person Teams Interview	May 16, 2025

You are welcome to visit the University Park Campus anytime during the selection process, but guided campus tours will be provided at one time for the Shortlisted Teams on April 22nd.

Participation in this selection process is voluntary and at no cost or obligation to The Pennsylvania State University (Penn State). The University reserves the right to waive any informality, in any or all submissions, and to reject any submission or portion thereof. Please contact me or the Facility Project Manager, Robert Lingenfelter (rrl144@psu.edu or 814.867.1536), with any questions.

Thank you for your anticipated participation in this RFP process. The Pennsylvania State University looks forward to reviewing your responsive proposal for this important project.

Respectfully,

A handwritten signature in black ink, appearing to read 'Neil Sullivan', with a long horizontal flourish extending to the right.

Neil Sullivan, CFP, AICP, PLA, LEED AP
University Planner
The Pennsylvania State University
814.863.3158
nsullivan@psu.edu

CC: Screening Committee