

The Berkeley campus of the University of California requests that firms submit written statements of interest and qualifications to provide architectural planning services for the following proposed project:

**Strategic Facilities Plan for the Haas School of Business
(Project 18217A)**

At this time, the Berkeley campus and the Haas School of Business are considering a number of initiatives which have the potential to improve the facilities of the School to meet current and future needs. However, in order to ensure that these improvements align with and promote its long-term goals, the School intends to undertake a Strategic Facilities Plan.

The Strategic Facilities Plan is envisioned as the first phase of a program of capital improvements which may include both renovations to existing facilities and construction of new facilities. The firm selected for the Strategic Facilities Plan may continue as the architect for some, all or none of these future projects. However, the scope and schedule of the improvements program will not be determined until the Strategic Facilities Plan has been completed.

Work on the Strategic Facilities Plan is to begin immediately upon execution of the contract and be completed by July 1, 2008. The compensation shall be a lump sum fee not to exceed \$185,000, including reimbursables. A detailed scope of services may be obtained on our website

<http://www.cp.berkeley.edu/RFQ.html>

Please submit a brief letter describing your interest in the project and your experience with similar projects. You may include any supporting material that you think would help us evaluate your firm for this work. Firms that best meet the screening criteria will be invited to appear for an interview. Submittals should be addressed to the address below no later than noon Friday, February 15, 2008. Five (5) copies of the submittal are requested. Please address submittals to

Emily Marthinsen
Assistant Vice Chancellor, Physical & Environmental Planning
Facilities Services, University of California, Berkeley
1936 University Avenue, Room 232
Berkeley CA 94704-7027
510-643-3387

Questions not answered in the information packet may be addressed to Ms. Marthinsen at emarthinsen@cp.berkeley.edu

The University of California is an Equal Opportunity Employer. Every effort will be made to ensure that all persons regardless of race, religion, sex, color and national origin have equal access to contracts and other business opportunities with the University. Each candidate firm will be required to show evidence of its equal employment opportunity policy.

The successful firm will be required to sign the University's Professional Services Agreement which is posted for review at <http://www.cp.berkeley.edu/PSA.pdf>.

Strategic Facilities Plan: Haas School of Business

A. INTRODUCTION

The University of California, Berkeley (UC Berkeley) will be selecting an Executive Architect (EA) to prepare a Strategic Facilities Plan for the Haas School of Business. The compensation for the plan shall be a lump sum fee not to exceed \$185,000. UC Berkeley is selecting only the EA at this time: sub consultants will be selected later in collaboration with the selected EA.

This Strategic Facilities Plan is envisioned as the first phase of a program of capital improvement which may include both renovations to existing facilities and construction of new facilities. The firm selected for the Strategic Facilities Plan may continue as the architect for some, all or none of these future projects. However, the scope and schedule of the improvements program will not be determined until the Strategic Facilities Plan has been completed.

B. PROJECT BACKGROUND

It has been twelve years since the Haas School of Business moved into its new building at the east edge of the Berkeley campus. Since then, the numbers of students and faculty have grown and new research groups and instructional programs have been created. The School complex itself—three interconnected buildings—is now very crowded. In response to the pressure of growth, decisions on space utilization and renovations have often been made ad hoc and the clarity of the original spatial organization has been lost.

At this time, a number of campus and School initiatives are under consideration. In order to understand near-, mid- and long-term Haas School of Business space needs and to respond to questions raised in analysis of current initiatives, the School intends to undertake a Strategic Facilities Plan.

The existing 3-story building complex contains approximately 234,000 gross SF. The School presently enrolls 2178 students: 700 undergraduates, 490 full-time MBA students, 84 PhD students and 904 students in special degree programs such as the Evening/Weekend MBA, Executive MBA and MFE programs. The School also serves roughly 250 non-degree participants per year in its executive learning programs. There are 74 ladder-rank faculty members and approximately 80 visiting and non-permanent faculty each semester. 220 staff members work in the 3 buildings and off-site in rented space. The School buildings contain faculty offices, PhD student offices, administrative offices, conference rooms, instructional spaces, organized research units, food service, student lounges, computer labs and the Economics/School of business Library.

C. SCOPE OF SERVICES

The scope of services for the Strategic Facilities Plan is envisioned as a four phase sequence as described below:

1. Assess the strategic context for future capital investment, including existing plans and proposed capital projects. Identify key trends and initiatives. Define principles and objectives to guide future investment in School facilities.

2. Define space utilization criteria, assess current facilities in terms of those criteria and identify key deficiencies.
3. Prepare a space program that corrects existing deficiencies and meets the strategic principles and objectives
4. Identify and evaluate alternative investment strategies to accommodate the space program.

STRATEGIC ASSESSMENT

During this phase, consultant will do both internal and external assessments. Working with a steering committee or task force of the Haas School of Business leaders and UCB campus planners, the consultant will identify current deficiencies, future constraints and potentials for program growth, development and relationships with other programs. The consultant will gather information about selected peer institutions specifically focused on trends in space utilization and space delivery methods. The consultant will prepare draft strategic assessment findings. Findings will include 1) experienced and perceived deficiencies in existing space; 2) major drivers of future change; and 3) principles and objectives for future capital investment. The steering committee will review and critique the findings at a workshop. Based on review, consultant will refine findings for memo report.

DELIVERABLE: Memo report that documents findings of strategic assessment.

SPACE UTILIZATION ANALYSIS

Consultant, working with the Haas School of Business and campus staff, will confirm and record existing space use and will develop space use categories and utilization criteria (based on policies and practices at UC Berkeley and peer institutions). Consultant will prepare draft analysis of existing space use related to criteria. This will include comparing actual findings to experienced and perceived deficiencies documented during the strategic assessment. The steering committee will review and critique draft analysis at a workshop. Based on review, consultant will refine analysis for memo report.

DELIVERABLE: Memo report that documents utilization analysis.

SPACE PROGRAM

Consultant will identify the range of activities to be accommodated in the Strategic Facilities Plan and identify the approximate area required for each activity based on best practices, campus and university policies and consultant expertise. The consultant will describe required/desired spatial relationships among activities, including identifying what must be in the School complex itself, what must be nearby and what could be distant. The consultant will also describe key qualitative aspects of space required for each activity. The consultant will draft a program for near-, mid- and long-term space requirements. The steering committee will review and critique draft program at a workshop. Based on review, consultant will refine program for memo report.

DELIVERABLE: Memo report that documents space program.

OPTIONS ANALYSIS

Consultant will identify and describe up to 3 possible options to accommodate the space program including, if relevant, site plans, section diagrams and block floor plan diagrams. Diagrams are not expected to suggest architectural treatment—they should be scaled to allow site and program “fit” to be evaluated. Options may include new building, addition to existing building, internal reconfiguration, reprogramming of existing or planned space, other capital/noncapital options (lease, program consolidation, other) or any combination of these. In consultation with campus

staff, consultant will characterize each option in terms of probable range of capital cost (within a range of plus or minus 10% based on comparable facilities). In consultation with the steering committee, consultant will evaluate each option in terms of strategic principles and objectives, space utilization criteria, campus goals and policies and funding prospects. Consultant will prepare draft analysis of options and steering committee will review and critique at a workshop and then select a preferred option. The preferred option will likely be a program with multiple initiatives.

DELIVERABLE: Memo report that documents options analysis and selection of preferred option.

FINAL PLAN

School and campus will present options analysis to campus committees for review and critique. Consultant will work with steering committee to refine options analysis and conclusions and will prepare final Strategic Facilities Plan document. The final plan will include summaries of strategic assessment and space utilization studies, description of options including diagrams, summary of options analysis and description of preferred option.

DELIVERABLE: Strategic Facilities Plan