Carleton College

Request for Proposals
Carleton College
Facilities Master Plan

Carleton College
One North College Street
Northfield, MN 55057

May 10, 2013
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1.0 Project Introduction

Carleton College is requesting proposals from architectural and planning firms interested in assisting the College in developing a campus Facilities Master Plan. The primary focus of the facilities master plan is to incorporate the College’s new strategic plan approved by the Board of Trustees October 2012 and identify the supporting facilities and infrastructure requirements to meet the strategic plan objectives. Carleton’s strategic plan affirms our commitment to preserve and enhance our academic excellence so that Carleton remains one of the very best liberal arts colleges in the world. The selected consultant will demonstrate ability to understand Carleton’s core mission and academic priorities, rich history and tradition, existing physical assets and their value to the College, and how to best integrate this into an economical and feasible plan for the future.

Carleton College is a private, liberal arts college with approximately 1,900 students. The Carleton campus is located 45 minutes south of Minneapolis, Minnesota, in the City of Northfield. The campus includes 1,040 acres of central campus, arboretum, and athletic fields.

Incorporated in 1865, Carleton College strives to provide a liberal arts education of the highest quality. The College is consistently ranked as one of the ten best liberal arts colleges in the United States. Carleton’s defining characteristics and profound strengths include; a fierce commitment to the liberal arts, belief in a residential learning experience, a symbiotic relationship between superb teaching and scholarship, the need to recruit/retain the best faculty and staff, the importance of lasting personal connections between students and faculty/staff, diversity as a community strength, and paying careful attention to our students’ well-being and development in aspects of their lives that go beyond the strictly academic.

In order to determine how best to meet the goals and address the principal issues identified by the Strategic Plan, how best to use our extant space, and how best to anticipate and provide for future College needs, the Strategic Plan calls for a Facilities Master Plan. The College has organized a process and three committees who have the responsibility to develop the Facilities Master Plan. A charge has been developed for each of the committees that identifies the deliverables, priorities, issues, and other items of consideration that each committee should address in their work. The charge document for the Facilities Master Planning Core Committee is included as an attachment for your reference and is an important document that should be referred to as firms prepare their proposal.
2.0 Project Scope

One key initiative in the strategic plan is to make focused investments in facilities that directly advance Carleton’s mission. The strategic plan identifies both the three most pressing physical plant projects to be addressed in the next decade as well as four other priorities that require attention in the near term. It also calls for the College to make meaningful headway in reducing its backlog of deferred maintenance projects.

Carleton must have first-rate buildings and facilities and must maintain our physical plant to appropriately balance the needs of current and future generations. We have a responsibility to be a wise steward of our man-made and natural environment. Carleton seeks to reduce its carbon footprint in accordance with our Climate Action Plan.

Carleton highly values an inclusive, collaborative, and transparent planning process. A Master Planning Core Committee, Science Planning Group, and Music/Public Events Venue Planning Group have been formed to guide the Facilities Master Planning process. The firm retained to assist the College will meet regularly (monthly) with these groups, meet with senior College leadership and other campus constituents, and present/gather information to/from the campus community. Firms should feel free to propose the most effective process for interacting with these committees, groups, and campus constituents including the use of technology to meet in a virtual setting.

The Facilities Master Plan must address the following:

- Assist with providing a comparative and analytic framework for our planning. Assemble relevant information and data including benchmarks, successes from other peer institutions, and best practices.

- Identify opportunities, strategies, and complications of the developing plans of the committee.

- Provide in depth, specific knowledge, and resources to assist with planning of the specific projects and initiatives arising from the Facilities Master Plan.

- Of the items in the committee charge, we believe the consultant can be particularly helpful with the Science, Music, Sayles-Hill, and Scoville portions of the charge, in the context of an overall campus plan.

- Provide conceptual design support for documenting and communicating the plans of the committee.
• Assist with the compilation and preparation of a final Facilities Master Plan report, including the drafting of specific sections as assigned by the committee

The Facilities Master Plan should also address issues of pedestrian, bicycle, and vehicle circulation (including service access to buildings) especially in regards to recommendations and changes proposed to the campus. The plan should comment or note other campus deficiencies that would hamper or impede progress in completing recommendations in the plan. It is the intent of the College to follow this Facilities Master Plan development with a separate process to identify a campus utilities master plan and landscape master plan.

3.0 Facilities Master Plan Contents

The Facilities Master Plan will be a document that guides future capital investments and decision-making for new buildings, renovations, changes, and enhancements to the campus.

The Plan will need to identify cost estimates to all recommendations. Recommendations should be prioritized, sequenced, and broken into phases that bring the most value to Carleton in terms of meeting its strategic goals within a reasonable time period. Recommendations should be developed and scheduled in a fashion consistent with anticipated College financial budget and fundraising capacities.

More detail should be provided for projects recommended to be completed in the next ten years, with the ability to inform the campus ten year capital plan and budget.

The Facilities Master Plan should contain both narrative text to explain thought and process as well as maps, graphs, and other visual aids to communicate effectively to a wide audience. The Plan should also address community and regional partnerships and impacts.

4.0 Selection Process Description

Carleton College will invite selected architects and planners to submit a written proposal and invite finalists to an interview process. Firms receiving this RFP have been recognized as “qualified” based on reputation and apparent project experience. Teams with campus planning and design/architecture experience relevant to the project scope previously defined in Section 2.0 will receive stronger consideration. Final selection will be based on proposal responses and interviews.

The preference is for facilities master planning services to be provided in one contract for design services. Firms may partner with others to bring the right level of expertise to their
team. Carleton College reserves the right to separately approve providers or combine different providers of design and planning services if it is advantageous to the College.

Requests for Proposal and pertinent documents are dispersed electronically. These documents are also available on the College’s Web site at: https://apps.carleton.edu/campus/facilities/projects/RFP/

The proposed schedule for the proposal reviews, notification, and interviews is as follows:

- May 10, 2013  □ Send Request for Proposal (RFP)
- May 24, 2013  □ Proposal due (12 p.m. CDT)
- May 28, 2013  □ Select firms for interviews
- June 6-7, 2013 □ Conduct interviews
- June 17, 2013 □ College awards contract
- July 1, 2013   □ Start the planning process
- January 24, 2014 □ First draft due
- May 9, 2014   □ Trustees approve final Plan

The successful firm shall demonstrate:

- Significant prior experience in campus planning and design of this type.
- Support of past clients and project team members.
- Availability and full commitment to the project of senior and key supporting professional personnel who have had significant prior experience with: planning, producing master plans, documentation, and architectural testing of projects similar to the proposed scale and functions of the needs described in the strategic plan.
- Higher education experience.
- Sustainable design experience.

Based on the experience and abilities of current staff, proposed key personnel, and the firm (or team) demonstrate they are capable of:

- Leading College faculty and staff through a participatory process;
- Introducing to the design process functional requirements that may not be evident to constituents, such as circulation, infrastructure requirements, pedestrian paths, vehicle circulation, etc.;
- Bringing to the design process significant comparable experience and demonstrating an ability to evaluate the validity of aesthetic requirements in comparison with existing and planned facilities;
- Conducting a cost estimating exercise that will provide a credible estimate of the probable cost range of the work being planned;
- Expertly integrating sustainable design principles;
• Working cooperatively and productively with College planning committees, administration, and other consultants in effectively meeting project time schedules.

5.0 Proposal Instructions

The proposal shall be directed to:
   Steven Spehn, Director of Facilities and Capital Planning
   Carleton College
   Facilities Department
   One North College Street
   Northfield, Minnesota 55057
   507/222-4271
   sspehn@carleton.edu

Questions should be written and directed to Steven Spehn by email at the address above.

The College supports the use of electronic file format. Please submit your proposal electronically with attachments as needed.

The proposed fee should be sent with the proposal. Please document any qualifications or special conditions affecting your fee proposal.

The deadline for submitting a proposal is **May 24, 2013, by 12 p.m. CDT.**

The Owner reserves the right to reject any and all proposals. Proposals shall remain valid for a period of 45 days.

The body of the proposal should include the following in the order and format explained:
• Business organization (name, corporate office address, regional offices and office designated to perform work, form of incorporation).
• Project organizational chart(s) including consultants or associated firms and listing the names of the key personnel to be assigned to the project.
• Resumes of key project personnel with personal references and individual experience with relevant projects. For each personnel indicate:
   a) their role on the project team;
   b) the length of time the person has been with the firm;
   c) their experience with similar projects and the capacity in which they served on those projects; and
   d) other pertinent background information.
• Statement of ability to staff the project and a schedule for key personnel showing hours allocated to the project by phase of work.
• Statement of conceptual intent and general approach towards the proposed planning process, including a work plan and specific demands on Owner representatives. Indicate what you consider to be the most important issues for the College in completing the master plan.
• Demonstration of ability to perform within time and budgets.
• A list and description of three, and no more than five, related projects completed or underway in the last ten years including the college name, location, size, owner contact, and phone number.
• Fee proposal.

6.0 Additional Information

Look for the following planning documents provided for your reference:

• 2012 Strategic Plan
• Facilities Master Planning Core Committee Charge
• Climate Action Plan
• Campus Map  http://apps.carleton.edu/map/
Facilities Master Planning RFP
Consultants

AECOM (Ellerbe Becket)
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