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**Strategic Vision & Capital Development Plan  
Request for Qualifications  
Western Washington University – Project SP091  
March 9, 2023**



WESTERN WASHINGTON UNIVERSITY  
STRATEGIC VISION & CAPITAL DEVELOPMENT PLAN, SP091  
REQUEST FOR QUALIFICATIONS

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## SUBMITTAL DEADLINE AND INSTRUCTIONS

**Response Date: 3:00 PM PST, Bellingham WA local time, April 10, 2023**

Qualifications will be received by Western Washington University from firms interested in providing Strategic Visioning & Campus Development Planning.

Services are to include data and space-needs analysis, programming, stakeholder engagement, campus and project planning, budget forecasting, and development of a comprehensive Strategic Vision & Capital Development Plan document.

Firms must have an established record of excellence in space-needs assessments, programming, data analysis, stakeholder engagement, and planning, with a strong background in the design and planning of higher-education institutional facilities and built-environment sustainability.

For project information and required submittal information, please visit:

<https://cpd.wwu.edu/request-qualifications-rfq>

For questions and clarification during the RFQ response phase, please contact the project manager:

Forest Payne, AIA, DBIA, LEED AP  
Project Manager & University Planner  
Facilities Development & Operations  
Western Washington University  
[Forest.Payne@wwu.edu](mailto:Forest.Payne@wwu.edu)

The University is requiring electronic submittals of the items listed below for this solicitation. Hard copy submittals will not be accepted. Submissions must be electronically delivered. A link for uploading your submission will be posted on this webpage: <https://cpd.wwu.edu/request-qualifications-rfq>. Please upload submissions no later than 3:00 pm on the date scheduled.

1. The University will use the time stamp on the submittal upload to determine timeliness.
  - a. Proposers are responsible for ensuring timely delivery of submittals.
  - b. The University is not responsible for Finalists' technical difficulties in submitting electronically.
  - c. Late submittals will not be evaluated.
2. Submittal format requirements:
  - a. Formatted in a single searchable PDF.
  - b. Organized in accordance with the RFQ.
  - c. Include PDF bookmarks for each section of the Qualification response, corresponding to the sections outline in Submittal Requirements below.
  - d. The submittal PDF shall not exceed forty (40) pages if formatted as 8.5x11 portrait,

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- or twenty (20) pages if formatted as 11x17 landscape, not including insurance documentation.
- e. The font should be no smaller than 11 point, except for image captions which may be 8 point.
  - f. The electronic submittal file name shall be formatted as follows: "SP091\_SVCDP – Qualifications\_[firm name or abbreviation].pdf".
  - g. Please limit file size to 80MB.

If issues arise in accessing the RFQ documents or the submittal portal, please contact:

Western Washington University  
Facilities Development & Operations  
Lisa Brennan, Communications for FDO  
[Lisa.Brennan@wwu.edu](mailto:Lisa.Brennan@wwu.edu)  
[\(360\) 650-3958](tel:(360)650-3958)

Any addenda issued for this RFQ will be published at the following website address:

<https://cpd.wwu.edu/rfq>

Design teams are responsible for checking the website for any addenda prior to submission of Qualifications. If you are unable to download the addenda, you may contact the individual noted above.

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## PROJECT INTENT

This project is to complete a Strategic Vision & Campus Development Plan (The Plan) for Western Washington University in Bellingham, Washington. Western Washington University's main campus is situated on the ancestral homelands of the Coast Salish Peoples, who have lived in the Salish Sea basin, all throughout the San Juan Islands and the North Cascades watershed from time immemorial. We express our deepest respect and gratitude to our Indigenous neighbors, for their enduring care and protection of our shared lands and waterways.

Western is a public comprehensive institution dedicated to serving the people of the State of Washington. Founded in 1893, the main campus is located on 220 acres in Bellingham, Washington, a city of approximately 90,000 people between Vancouver, B.C. and Seattle. Old Main, the first permanent campus building, was completed in 1896, and the campus has grown to over 100 buildings at five locations, with most of the physical infrastructure located on the main campus. Current enrollment is over 15,000 students, 93% undergraduates, enrolled in over 200 academic programs.

Western's physical infrastructure provides key educational resources, including modern, flexible classrooms and labs, physically and culturally accessible spaces, and safe, welcoming, comfortable housing. In addition, the built environment and grounds create the aesthetic that defines the community, providing a connection to the natural world, a sense of place, and a backdrop for public art. Western builds human scaled projects that enhance the educational experience, harmonize with the extraordinarily beautiful surroundings, and highlight expansive water views and abundant northwest vegetation.

The Plan will be rooted in the values, goals, and [strategic vision of Western Washington University](#), and a primary purpose of the Plan is to ensure that the built environment of the University aligns with and enhances these principles.

## SCOPE OF WORK

1. Introduction - Purpose of the Plan
2. Scope Requirements – Research, Analysis & Deliverables
3. Stakeholder Engagement – Participants in the Planning Process
4. Resources

### 1. INTRODUCTION – PURPOSE OF THE PLAN

#### **Purpose of the Plan**

The Plan will establish a campus vision for the next 10-15 years and guide ongoing decision-making around capital planning and development, campus open space, and infrastructure in a manner that aligns with the values, goals, and strategic vision of Western Washington University. The current 10-year capital plan for Western anticipates that much of the development during this time period will be focused on infill and renovations/modernizations of existing buildings.

The Plan will assess programmatic space and facility needs across campus, study existing facilities for their suitability to meet these needs and aim to establish a sequence for the next several biennia of projects, including strategies for developing swing space to allow for the likely relocation, whether temporary or permanent, of programs currently housed in each of those buildings.

The Plan will explore programmatic space and facility needs across campus related to issues of ADEI, health and well-being, and student, faculty, and staff collaboration. It will make recommendations for how to address these needs in future projects of all scales and funding sources. The Plan will also consider goals related to sustainability, climate impact, and resilience. It will also consider opportunities for partnership and development beyond the main campus, including at satellite locations.

#### **Background**

Planning and development on Western's campus are currently guided by the **2001 Institutional Master Plan** (IMP), a zoning and regulatory document jointly created by the City of Bellingham and Western in accordance with the WWU Neighborhood Plan.

Western's accreditation and capital planning processes require that planning guidelines and standards be developed and maintained. The Northwest Commission on Colleges and Universities (NWCCU) 2020 Standards include the following requirement:

**2.1.1 Physical and Technology Infrastructure:** *Consistent with its mission, the institution creates and maintains physical facilities and technology infrastructure that are accessible, safe, secure, and sufficient in quantity and quality to ensure healthful learning and working environments that support and sustain the institution's mission, academic programs, and services.*

This requirement is best satisfied through ongoing campus engagement in the planning

process, including the development, implementation, and periodic review of the campus development plan. Historically, the capital planning and budget process in Washington State has been structured around biennial capital requests guided and informed by a rolling 10-year capital plan.

Western finds that development of a **Strategic Vision and Campus Development Plan** is necessary at this time to align with and support accreditation and integrated budget processes and to ground planning efforts in the current culture and conditions of its campus and communities. Besides addressing the accreditation requirements, it will be a tool of communication to various stakeholders across campus about major project priorities, sequence, and synergies.

The Plan will be developed as a living document, anticipating that conditions, culture, demographics, and priorities will evolve over time, and will integrate a flexible framework to accommodate these shifts while staying rooted in benchmarks, and remaining relevant over the planning horizon.

It should be noted that the Plan is specifically not intended to replace the 2001 IMP, but rather will serve as the foundation to allow Western to engage and collaborate with the City of Bellingham to update campus land use regulations at the appropriate time. The Strategic Vision and Campus Development Plan is so named to clarify its purpose and avoid confusion with the Institutional Master Plan.

## **2. SCOPE REQUIREMENTS – RESEARCH, ANALYSIS & DELIVERABLES**

The planning consultant will base their approach to this project on information gathered from a review of existing resources, engagement with campus stakeholders, and the consultant’s own observations and expertise. While the Plan is expected to be generally comprehensive, the level of detailed development of each component will vary and can rely on existing studies or plans that are current and relevant or are scheduled to be updated in the near future. The planning consultant may engage subconsultants with specific expertise as appropriate in developing any of the scope components.

The Plan is intended to address and incorporate the scope components listed below.

### **Assessment & Analysis Phase**

#### **Vision, Initiatives, and Strategy**

Goals/Guiding Principles of the Plan  
Mission/Strategic Plan Alignment  
Academics: Future of the Institution  
Enrollment  
Access, Diversity, Equity, and Inclusion (ADEI)  
Health and Wellness  
Sustainability and Climate Change  
Stakeholder engagement (see section below)

### **Related Resources**

Strategic Plan 2018-2025

Okanagan Charter

Sustainability/Climate Action Plan

#### **Academic Programs (current and planned)**

Expansion of existing program offerings

- Modification of existing programs
- Anticipated new programs
- Anticipated expansion of graduate programs
- Program consolidation
- Satellite programs ([Western on the Peninsulas](#), Shannon Point, etc.)

**Enrollment, Capacity, and Space Utilization**

- University enrollment (current and projected)
- Program/Major enrollment (current and projected)
  - Enrollment projections, management, goals
- Overall space utilization Campus Space Modeling Study
  - Include impact assessment of hybrid work & instructional patterns that have developed during and since the pandemic, considering institutional goals related to each

**Existing Campus Conditions**

- Site/Campus Land Use 2001 Institutional Master Plan  
2005 WWU Neighborhood Plan  
1997 Draft Comprehensive Campus Master Plan  
2000 Campus Character Study
- Campus image and identity
- Campus gateways and wayfinding
- Campus edge
- Relationship with Bellingham and wider community
- Access, mobility, and circulation 2005 South campus dev. plan
- Parking and transportation Parking Master Plan Update
- Landscape and open space
- Utilities and infrastructure Utilities Master Plan Update  
2022 Heating Conversion Study
- Functional use patterns (siloes vs. integrated)
- Collaboration and innovation
- Workspace patterns and distribution across campus
- Safety and security
- Historic and cultural resources/preservation
- Sustainability and stewardship
- Resilience
- ADEI (current programs and spaces)
- Academic Buildings Facility Condition Assessment
  - Condition
  - Adequacy/suitability/adaptability
  - Current utilization/desired amenities 2014 STEM Space Needs Assessment
  - Prioritized deferred maintenance
  - Financial constraints
- Support/Auxiliary Buildings Facility Condition Assessment
  - Condition
  - Adequacy/suitability
  - Current utilization/desired amenities
  - Prioritized deferred maintenance



Financial constraints	
Recreation and athletics	
Housing	Housing & Dining Assessment
Condition	Facility Condition Assessment
Adequacy/suitability/adaptability	
Affordability (include students, faculty, and staff)	
Current utilization/desired amenities	
Prioritized deferred maintenance	
Financial constraints	
Satellite programs (e.g., Western on the Peninsulas, Shannon Point, etc.)	

**Campus Vision and Development Plan - Final Deliverables Outline**

- Summary report of analyses and findings noted above
  - Incl. data benchmarks that form basis of Plan strategy and goals
- Campus character and design
- Development and modernization sites
  - Major projects sequence and related swing space and relocation strategies
    - New construction/growth (anticipated during timeline of Plan)
    - Building modernizations
- Landscape and open space
  - Parking and transportation
  - Access, mobility, and circulation
- Programmatic/space needs (organized by space type categories), including:
  - Strategic adjacencies
  - Utilization goals
  - ADEI (program, space, and facility needs)
  - Health and wellness, Okanagan Charter
  - Work and collaboration space (students, faculty, and staff)
- Partnership and development opportunities beyond the main campus
- Satellite development sites and scope (e.g., Western on the Peninsulas, Shannon Point, etc.)
- Utilities and infrastructure impacts of proposed development
- Sustainability and stewardship
- Resilience
- Development priorities and plan implementation
  - Capital planning (state and non-state funded)
    - State Ten-Year Capital Plan (rolling, include with every Two-Year Capital Request)
    - Conceptual Budget Strategy and Cost Projections
- Appendices as determined during plan development

**Excluded Scope**

As stated above, the Plan is not intended to replace the 2001 IMP and as such will not address jurisdictional land use of development standards.

The consultant is not expected to engage in University strategic or academic planning but rather will rely on the outcomes and principles of these distinct, ongoing, and potentially parallel planning efforts, along with the information gathered during the background research, stakeholder engagement and plan development phases, shown in the preliminary project schedule below.

### 3. STAKEHOLDER ENGAGEMENT

Consultants will work closely with the Project Manager listed above and a project leadership group from Western’s office for Facilities Development & Operations, to plan and execute the work. The heart of the planning effort will be in broad and varied stakeholder engagement, to supplement and expand on the background research and analysis into how Western uses its facilities, to engender broad participation and transparency, and to help the deliverables of the Plan to be rooted in Western’s mission, values, vision, and goals. Below is a matrix intended to give a preliminary sense of the types of stakeholder groups anticipated to be involved in the development of the Plan, along with conceptual types and quantity of engagement with each of the groups.

Many of these groups are established and common among higher-education institutions, and many will be identified and convened for the sake of specific interaction with the Plan consultant team. The matrix is not intended to be an exact nor fixed quantity, but to give an idea to proposing teams about the level and nature of stakeholder engagement that will be expected of them. The University will seek and welcome input from consultant teams as to which other stakeholder groups should be included, as well as the appropriate strategies for engagement. Meeting scope, content, and scheduling will be coordinated between the consultant team and the Project Manager.

	Virtual meeting(s)	In-Person/ Hybrid Workshop(s)	Survey	Townhall	"Tabling"
<b>Univ. budget &amp; facility stakeholders:</b>					
President's Cabinet (VPs & Officers)	2	2			
Board of Trustees		3			
Capital Planning & Space Advisory Committee	2	2			
University Budget Committee & Extended Leadership Team	2	2			
Foundation	2				
Steering Committee	Monthly	2			
Facilities Development & Operations (Project leadership group)	Bi-weekly				
FDO (Facilities Management & Operations representatives)	3			1	1
President's Sustainability Council	1	1			
<b>Academic Affairs division:</b>					
<a href="#">Leadership group from each College/Academic Unit (10)</a>	10				
Council of Deans	2				
Faculty Senate	2				
Other Academic Affairs leadership	2				

	Virtual meeting(s)	In-Person/ Hybrid Workshop(s)	Survey	Townhall	"Tabling"
<b>Enrollment &amp; Student Services division:</b>					
Enrollment & Student Services leadership	2	1			
Enrollment Management	2				
University Housing, Dining and Student Union leadership	2				
Athletics (reports to President) & Campus Recreation (ESS division)	2				
Other Auxiliaries leadership	2				
<b>Advocacy stakeholders:</b>					
ADEI stakeholder groups (faculty/staff employee committees, program reps)	2	2			
ADEI stakeholder groups (student representatives)		2	1		1
Associated Students (student government)		1			
Student body			2	2	2
Okanagan Charter representatives	1	1			
Faculty/Staff employee representation groups	2				
Faculty/Staff			1	1	
Office of Institutional Effectiveness (institutional data office)	2		Surveys will be vetted thru OIE		

#### **4. RESOURCES**

The following are among the existing resources that will inform development of the Plan and/or supplement the information included in the Plan.

##### **Strategic Plan 2018-2025**

Establishes institutional Mission, Values, Vision, and Strategic Goals. Development of the next Strategic Plan will likely commence during development of the Plan.

##### **2017 Accreditation documents**

[NWCCU's letter acknowledging acceptance of the Spring 2022 Ad Hoc Report](#)

##### **Okanagan Charter**

Adoption of the Okanagan Charter in November 2021 signals an institutional commitment to move toward more systems-level strategies that influence the health and wellbeing of every member of the Western community.

##### **2017 Sustainability Action Plan**

A strategic and tactical document that brings together a number of important initiatives and plans across campus, including Western's Climate Action Plan, the Sustainability Academy's White Paper, and Western's Sustainability Tracking and Rating System (STARS) report. The Action Plan is Western's roadmap for protecting local and global ecology, upholding social equity, creating economic vitality, and maintaining human health.

##### **2019 Campus Space Modeling Study**

This study took place in Fall of 2019, just before the COVID-19 pandemic began. It identified benchmarks for allocations of space tied to various metrics including enrollment head count, staff head count, etc. The result is an outline of quantitative and qualitative analysis indicating shortfalls in actual space compared with needs, as a rough order of magnitude. The Strategic Vision and Capital Development Plan will revisit the findings of this study, explore changes in the use of space post-pandemic, and shall re-establish benchmarks and update goals for closing the gaps identified.

##### **2001 Institutional Master Plan**

The long range development plan jointly put together by the city of Bellingham and Western in accordance with the Western Washington University Neighborhood Plan. It is anticipated that a future update to the IMP will be undertaken following completion of (and informed by) the Strategic Vision and Capital Development Plan as a separate project.

##### **2005 WWU Neighborhood Plan Update**

Most recent update of the 1996 plan incorporated into the Bellingham Comprehensive Plan. The Neighborhood Plan established the intent to develop and adopt the IMP.

##### **2000 Campus Character Study**

Summary report documenting a Character Study Charrette held in January 2000 for the purpose of identifying and depicting the key ingredients that compose the physical character of the WWU campus.

##### **Ten-Year Capital Plan, 2023-2033**

Developed in conjunction with and in support of biennial Capital Requests for submittal to the Washington State Legislature. Provides prioritized list of planned capital projects within a ten-year horizon and includes justification for each based on need, budget amounts, and planned funding schedule.

**Parking Master Plan Update**  
**Transportation Management Plan**  
**Utilities Master Plan Update**  
**[2022 Heating Conversion Study](#)**  
**2022 Facility Conditions Assessment**  
**2021 Housing and Dining Assessment**  
**WELS Surveys (see [Institutional Effectiveness](#))**

### **Campus History**

Hicks, Arthur C., *The First Fifty Years*. Western Washington State College, Bellingham, WA. 72 pp.

Hicks, Arthur C., *Western at 75* (1974). Western Washington State College Foundation, Bellingham, Washington. 132 pp.

De Lorme, Roland L., editor, with Steven W. Inge (2000). *Perspectives on Excellence: A Century of Teaching and Learning at Western Washington University*. Center for Pacific Northwest Studies, Western Washington University, Bellingham Washington. 229 pp.

Dietrich, William (2011). *Green Fire: A History of Huxley College*. Huxley College of the Environment, Western Washington University, Bellingham, Washington. 177 pp.

## SUBMITTAL REQUIREMENTS & SELECTION CRITERIA

- Letter of interest (one 8.5x11 page)
- Cover sheet (1 page), titled as follows:

*SP091 Strategic Vision & Capital Development Plan  
Western Washington University  
Consultant Qualifications Response  
[Firm/team name]  
[Submittal date, per deadline listed in Schedule section below]*
- Company/team profile (max. 2 pages)
  - Illustrate the team’s capabilities in data and space-needs analysis, programming, campus and project planning, and stakeholder engagement that are necessary to perform the services as described in the Scope of Work section above, and to generate a cohesive and legible final deliverable.
- Qualifications narrative and informational graphics, organized in sections addressing each of the following selection criteria items:
  - Proximity of the consultants to the main campus in Bellingham, WA
  - Qualifications, experience, and expertise of consultant team (partnering firms and individual members) relating to higher-education campus planning, programming, and strategic visioning, as well as long-range budget forecasting.
  - Diverse Business Inclusion plan that minimally states the percentage planned for each OMWBE certification category and veteran-owned businesses to afford maximum practicable opportunity to participate in this project.
  - Applied knowledge of planning and design of facilities that embody and enhance ADEI principles. Detail ways the firm will enhance and encourage Access, Diversity, Equity, and Inclusion principles in both the process and results of creating the Plan.
  - Applied knowledge of planning and design of campus facilities and infrastructure that recognizes and addresses the urgency of reversing impacts of the built environment on the global climate, and enhances the resiliency of the institution.
  - Applied knowledge of planning and design of facilities that promote human health and wellness, consistent with the principles of the Okanagan Charter, which Western adopted in 2021.
- Project experience outline (max. two 8.5x11 or one 11x17)
  - List of up to four campus development or master plans, including those noted in qualifications narrative section, with similar breadth and scope, that have been successfully completed by your firm, and up to two other projects related to strategic visioning and other campus planning exercises for higher-education clients.
  - Each project listed should include:
    - Name of institution
    - Institution location(s)

- Project start and completion dates
  - Website link to final Plan (if applicable/available)
  - Description of scope and aspects similar to this project
  - References: include their current company or institution, name, title, telephone number, and email
- Qualifications of persons that will perform duties on this project (max. one 8.5x11 per team member), including the following:
    - Role and anticipated responsibilities on this project
    - Anticipated FTE commitment to this project
    - Up to two references per team member (include reference's firm or institution, their title, name, telephone number, and email)
  - Insurance forms indicating the firm's ability to provide insurance in the following amounts:
    - Professional Liability Insurance – annual aggregate of \$1,000,000.
    - General Liability Insurance – combined single limit of \$1,000,000, aggregate limit of \$2,000,000.
    - Auto Insurance – combined single limit of \$1,000,000.
    - Workers Compensation

*Note:* Not maintaining all or part of the insurance described above does not necessarily disqualify a firm from eligibility. Please include a brief written explanation of the reasons for not maintaining such insurance along with your firm's available insurance forms for review by the selection committee.

## SELECTION SCHEDULE

March 14-16, 2023	Advertise RFQ for Design Team
March 21, 2023	Last day for questions regarding RFQ content
March 22, 2023	Target date for final addenda
<b>April 10, 2023</b>	<b>Consultant team qualifications due</b>
April 17, 2023	Selection Committee evaluation, creation of shortlist for interactive interviews
April 18, 2023	Send notification of results to all firms. Send interactive criteria to shortlisted firms.
May 1-3, 2023	Interactive Interviews: Tentative schedule 4-6 pm, one team each day. Plan for hybrid workshops with 2-3 members of each consultant team on Western's campus with selection committee and other stakeholders, with other member of the teams joining virtually.
May 4, 2023	Selection Committee evaluation and scoring
May 5, 2023	Selection approval by Vice President for Business and Financial Affairs
May 8-25, 2023	Negotiate contract and finalize consultant agreement
May 26, 2023	Action Item due to Board of Trustees
June 9, 2023	Board of Trustees approval of consultant agreement
June 16, 2023	Anticipate giving notice to proceed



