

# ATTACHMENT A

## SCOPE OF WORK

### Process

Based on our understanding of the District, the project scope described in your RFP, and discussions with SBCCD during contract negotiations, we have outlined a process for working with you to develop your Educational and Facilities Master Plans.

We will employ the five-step process described below and in the description of our Approach that follows, as a framework for discussions as we work with you to address your specific goals for this important project.

### Step 1 / Prepare

During this step, we will compile and review your educational/instructional data and existing planning documents. We will work with you to refine the project scope and to tailor the planning process and stakeholder participation to address the specific needs of your district. We will meet with your designated steering committee to review the process and schedule, define the project scope and discuss your master plan goals.

#### STEP 1 DELIVERABLES

- / Final project scope and timeline
- / EMP/FMP table of contents
- / Meeting agendas and minutes

### Step 2 / Analyze

This step will validate existing conditions and trends and establish a foundation of shared knowledge on which to plan for the future. Our team will conduct the internal and external scans and data analysis and engage the District's constituency to gain the benefits of stakeholders' insights. Departmental/program interviews will be conducted and instructional programs will be reviewed and analyzed. Concurrently, our team will update your Space Inventory, review your Facilities Condition Assessment, conduct site visits and meet with key personnel in order to build a complete understanding of the functioning and adequacy of your existing sites and facilities. Steering committee meetings will be conducted to review and validate our team's analysis and define the key academic and facilities planning issues and opportunities to be addressed in the master plans.

#### STEP 2 DELIVERABLES

- / Space Inventory Update
- / EMP internal and external scans
- / EMP program analysis
- / Review of retail/commercial facilities
- / FMP analyses of existing conditions
- / Agendas and meeting minutes

# ATTACHMENT A

## SCOPE OF WORK

### (CONTINUED)

#### Step 3 / Frame

Based on the shared understanding of issues and opportunities, this step will establish goals and criteria upon which to plan. Institutional Goals and Objectives will be established for each college, upon which programs of instruction and support services and enrollment/WSCH projections will be defined. Implementation linkages between the educational plans and other long-term plans, including the facilities master plan, will be developed. Our team will analyze the existing space Inventory and establish quantified programs of facilities space needs, based on Title V standards, to meet the future needs of both colleges. Steering committee meetings will be conducted to review the elements of this development framework and establish facilities planning priorities and criteria to guide the exploration of facilities planning options.

#### STEP 3 DELIVERABLES

- / EMP goals and implementation plan
- / Program enrollment and WSCH projections
- / Growth plan for colleges and outreach areas
- / Quantified space needs program
- / Meeting agendas and minutes
- / Instructional Space Utilization analysis

#### Step 4 / Explore

During this step our team will develop a series of facilities planning options for each campus that are built on the program of facilities space needs and address facilities planning priorities and criteria, as well as key issues and opportunities identified in the analysis of existing conditions. Several meetings will occur during this step to review and discuss options with the steering committee. At the conclusion of this step the committee will identify a preferred option for each campus to be developed into the recommended solution.

#### STEP 4 DELIVERABLES

- / Campus development options
- / Preferred option for each campus
- / Interim Accreditation Report
- / Meeting agendas and minutes

#### Step 5 / Recommend

During the final step our team will develop the master plan recommendations, including facilities and site improvement project scopes and sequence of implementation. This information will be reviewed at the final planning committee meetings for buy-in and approval. We will then develop ROM budgets and staffing requirements, along with strategies to maximize funding opportunities. The educational and facilities master plan documents will be prepared as the final step and draft documents will be made available for review and comment. The completed SBCCD Educational and Facilities Master Plan documents will clearly demonstrate a participatory and integrated planning process that reflects your institutional cultures and serves as a meaningful roadmap for the future.

#### STEP 5 DELIVERABLES

- / EMP/FMP documents (6 printed copies and an electronic file of each)
- / FMP capacity/load analysis
- / Staffing and training analysis
- / Rough order of magnitude project development budgets
- / Total cost of ownership model
- / Project development programs and timeframes
- / Project funding strategies
- / State capital outlay positioning
- / Meeting agendas and minutes

# ATTACHMENT A

## SCOPE OF WORK

### (CONTINUED)

### **Approach**

The process of master planning is dynamic and exciting. When done well, the result will be a detailed roadmap to meet the needs of multiple constituencies. Addressing the needs of students, faculty, staff and community, the educational master plan becomes one of the principle documents that provide direction to meet the requirements of accreditation and a formative evaluative roadmap. A facilities master plan, when linked to and driven by the educational master plan, results in a plan for a campus that is the physical embodiment of the institution's academic vision. Thus, it is vital that the master planning process connects with and gives voice to the college's community.

Within a multi-college district, there are multiple master planning documents. Integrated planning provides a mechanism through which the District Strategic Plan, the Educational Master Plans, the Facilities Master Plans, and other long-range plans are aligned to support the District's mission and positioned to guide the District, colleges, divisions and departments in a unified direction. The alignment of integrated planning provides evidence of a collaborative process and ensures that the implementation of each plan has "buy-in" across the many constituencies.

Our five-step integrated master planning approach provides a logical sequence of activities that builds upon previous steps and results in the development of data-driven plans with measurable goals and actions for implementation.

### **Step 1 / Prepare**

Educational/instructional and facilities data gathering will be a continuous effort throughout the integrated master planning process. The data compilation processes, outlined below, will provide the quantitative and qualitative information necessary for the formative and summative evaluation results that inform the development of master planning goals and implementation strategies.

#### **Compiling and Reviewing Existing Documents and Data**

We will compile and review all existing documents relevant to the master planning process. Such documents include the current strategic plan, educational master plans, facility master plans, technology plans, sustainability plans and program review documents, as well as surveys, building and infrastructure plans, EIRs, energy and water utility usage records, and transportation studies. Access to the District's FUSION information will provide our team with the current

space inventory, facilities condition reports, and facilities planning information. It is also important that an integrated master planning process include a review of the current and past accreditation reviews/documents in order to gain an understanding, not only the quantitative information, but the context in order to better support the District and colleges to fulfill and implement the recommendations of the accreditation committee.

#### **Integrated Master Planning Steering Committee/Constituent Input**

Every community college district is unique with its own culture and institutional memory and history. Upon meeting with the District and colleges' administration and staff, the shared governance processes at SBCCD will be better understood and involvement of the stakeholders may be accomplished efficiently and transparently.

The involvement of stakeholders will be facilitated through meetings, interviews, workshops, town hall-style meetings, community forums and, possibly, surveys. Presentation materials and draft agendas for all meetings will be created for review by the District and colleges prior to circulation.

At the initial leadership workshop, our team will collaborate with District and college leadership to structure the

# ATTACHMENT A

## SCOPE OF WORK

### (CONTINUED)

organizational participation and ensure that the master planning process is conducted appropriately within the District environment. We will establish data sources for the demographics analysis and establish the appropriate contacts within the District from whom to obtain educational and facilities planning information. We will establish milestones to move the project toward completion in accordance with the approved timeline. Listening to input from the District regarding the current environment, expectations for the work product, limitations, and ideas is essential. Reviewing these key aspects of the existing planning framework will prepare us to work effectively.

- History of the District, colleges and centers, and their academic planning efforts
- Mission, vision and goals
- Strategic plan
- Last accreditation report and self-study
- Education, facility, technology and student equity plans
- Student learning outcomes

The District and Colleges will determine the appropriate personnel to participate in Master Plan Steering Committee Workshops and our team will assist in this process as needed. The number and timing of steering committee workshops will be confirmed and, when needed, three separate workshops

will be held to help ensure the representation of all constituencies. During the first steering committee workshop, our team will introduce the committee members to the planning goals, process, and timeline and solicit their input on measures of success for the master planning project. Committee members will have the opportunity to participate in activities intended to broaden their perspective and knowledge of the campuses.

## Step 2 / Analyze

The activities in Step 2 are intended to create a knowledge base and a shared understanding of internal strengths and weaknesses and external conditions and trends that present challenges and opportunities for the future. The following is a description of the planning elements and activities that will be facilitated by our planning team. The results of these activities will be reviewed and vetted at steering committee workshops, town hall meetings and other venues for stakeholder input.

### Internal Scan—Profiles of the District and Colleges

We will conduct an analysis of the internal profile of the District and both colleges—San Bernardino Valley College and Crafton Hills College. Performance indicators to be examined

include enrollment, weekly student contact hours (WSCH), section offerings, full-time equivalent faculty (FTEF), student learning outcomes (SLOs), student success and retention rates, transfer rates, degrees, and certificates awarded. Student demographics will also be analyzed, such as student age groups, gender, race and ethnicity, and feeder high schools. Also included in the internal scan will be the analyses of data from planning documents such as accreditation committee reports and the SBCCD *Staffing Plan Report 2014-2017*.

### Stakeholder and Constituent Engagement

Students, the Board of Trustees, District administration, certificated staff, classified staff, and community organizations will be engaged in the planning process. Engagement of the entire constituency of SBCCD will allow an understanding of insights regarding educational programs and delivery. The process will provide opportunities for stakeholders to create a connection with the District and colleges. Listening to students, employees and community members about their joys and frustrations is one of the most valuable tools to understanding not only behavior, but to discovering the motivations of the constituents. We may engage stakeholders using a

# ATTACHMENT A

## SCOPE OF WORK

### (CONTINUED)

variety of methods including interviews, online surveys, town hall-style meetings, and one-on-one interviews.

#### **External Scan—Community Context**

An analysis of demographic data for the District and each college's service area will be completed. Data will identify indicators such as the service area population's average age and income, educational attainment, household size, ethnic make-up, future population growth projections and feeder high school statistics. Data regarding regional labor market information, including business and industry profiles and growth trends for future employment and job demand will be analyzed. A review of employment data and projections with current instructional program offerings at each College will provide valuable educational planning information.

#### **Program Analysis**

Instructional programs will be reviewed and analyzed on a departmental level. Using the program review process characteristics such as enrollment, section offerings, WSCH, WSCH/FTEF, instructional methods offered, success, retention, and student learning outcomes will be matched with definitions of success and facility use. Departmental and program interviews will be conducted at each college and information will be incorporated into the educational plans. Enrollment and

WSCH projections using acceptable methods will be conducted for each college based on data from internal and external scans.

#### **Facilities Analysis**

To gain a comprehensive and holistic understanding of the functioning and adequacy of your existing campuses, our team will review your plans and studies, observe patterns of use and interview key personnel. The facilities analysis will focus on many aspects of your campuses to provide an understanding of the surrounding context, vehicular and pedestrian circulation, parking capacity, functional zoning, character and use of outdoor space, energy and water usage, and other existing conditions that are important for planning future campus development and operations. The civil engineers on our team will also review existing storm water management systems and their adequacy in relation to recently enacted water quality regulations.

#### **Space Inventory Update**

Our team of educational and facilities planners will review your facilities and update SBCCD's space inventory on FUSION. This important task will provide an accurate accounting of your existing space and will lay the groundwork for data-driven facilities planning.

### **Task 3 / Frame**

An indicator of a thorough and integrated planning process is the clear alignment and linkage between distinct planning documents and implementation/action plans. The educational master plan for both colleges will be aligned with and will support the District Strategic Plan and will inform the college facilities master plans, technology plans, and other key planning documents through the use of implementation tools that will be developed for this purpose.

#### **Space Utilization Analyses**

Our team of educational and facilities planners will analyze the level of efficiency at which existing lecture and laboratory space is utilized. We will look for factors that may be limiting usage and instruction design options within each space. These analyses will help to inform decision-making when exploring options for future development of instructional space on your campuses.

#### **Program Projections**

Enrollment and WSCH will be projected for the five-year benchmark intervals for each college, based on data from internal and external scans and using a methodology that will be developed in collaboration with District and college leadership.

# ATTACHMENT A

## SCOPE OF WORK

### (CONTINUED)

#### **Educational Master Plan Goals and Implementation Plan**

Each college's educational master plan will have institutional goals for instructional and student support services. Each college's goals and objectives will be unique to its culture and identity, while aligned with the District-wide Strategic Plan. All educational master plan goals and objectives will be defined and measurable to support the accreditation commission's recommendations.

#### **Integrated and Connected Planning**

The vision and goals of the educational master plan must inform the facility master plan in regards to the quantity and type of space needed to meet instructional projections and programs. The educational master plan will project the future programs of instruction and support services at five-year benchmark intervals for years 2021, 2026, and 2031. Based on WSCH projections, Title V standards, and information in the FUSION database, the programs of instruction and support services will be translated into quantified space needs for each benchmark year, through the analysis of space need or surplus by room use type (lecture, laboratory, office, library, etc.). Through these space analyses, the educational master plan will establish parameters and guidelines

for the facilities master plan to plan for the amount and type of space that is aligned with the projected WSCH loads and is supportable by capacity load ratios. Facilities planning priorities and criteria will be developed through steering committee discussions to establish a vision for the quality of the campus environments and instructional and student support spaces.

#### **Step 4 / Explore**

During this step, our team will prepare and facilitate the review of a series of innovative facilities development options that translate the space program parameters, planning priorities, and criteria into physical facilities and site improvements. Through interactive workshops, we will facilitate a series of planning exercises to engage the group and foster innovative, out-of-the-box thinking. An important element of this step is the broadening of the discussion to include college and community groups to share preliminary thoughts and ideas before the master plan recommendations are finalized.

#### **Prepare Preliminary Options**

Previously established planning parameters, priorities and criteria will be reviewed. Preliminary options will be presented, discussed and evaluated.

#### **Further Development of Options**

Based on stakeholder input, more options will be developed and evaluated until a "preferred option" for each campus is selected.

#### **Accreditation Reporting**

Interim Accreditation Reports will be prepared during this step of the planning process. These reports will show that good planning is well underway. They will describe the colleges' draft institutional goals and objectives and demonstrate that they align with the District-wide Strategic Plan and support the accreditation commission's recommendations.

#### **Step 5 / Recommend**

During the final step our team will develop the preferred options into graphic and written recommendations, including capital project descriptions and implementation sequencing. The Facilities Master Plan will include innovative recommendations for future-oriented and sustainable campus development resulting from our multi-discipline team's integrated planning approach. The recommendations will address the character of outdoor spaces and buildings, water quality, infrastructure, transportation, circulation, energy and water use and other essential elements. This



# ATTACHMENT A

## SCOPE OF WORK

### (CONTINUED)

information will be reviewed at the final steering committee workshops for buy-in and approval. Our team will then develop the District facilities development program, ROM budgets, the analysis of the staffing structure and training needs, strategies to maximize funding opportunities, and all other deliverables. The educational and facilities master plan document will be prepared as the final step and draft documents will be made available for review and comment. The completed SBCCD *Educational and Facilities Master Plan* document will clearly demonstrate a participatory and integrated planning process that reflects your institutional cultures and will serve as a well-used roadmap for the future.

#### **Prepare Final Draft**

Final draft documents will be provided after incorporating any revisions requested during administrative review of the preliminary draft documents.

#### **Board Presentation & Approval**

Final draft documents will be provided to the Board of Trustees for review and approval. If requested, we will provide a presentation of the documents to the Board of Trustees. Following Board of Trustees approval, we will provide six hardcopies of each document as well as an electronic copy suitable for posting online.

#### **Qualitative and Quantitative Data Elements**

Data elements within the Educational Master Plan may include:

##### **Service Area**

- Demographics by City
- Top 10 Feeder High Schools
- Feeder High Schools Demographics
- Projected Feeder High School Graduates by Ethnicity
- Projected Feeder High School Graduates by Gender
- Service Area Educational Attainment by City, Ethnicity, and Gender
- Population Change Forecast by City, Ethnicity, and Age
- Projected Feeder High School Graduates
- Service Area Adult Participation Rates

##### **Student Characteristics, If Available**

- Demographics (Age, Gender, Ethnicity)
- Highest Level of Education Attained by Mother or Father
- Family Income
- Educational Goals
- Student's Ability to Read and Write English
- City of Residence

#### **Employee Characteristics**

- Full-time and Part-time Faculty
- Full-time and Part-time Classified Employees
- Full-time and Part-time Administrators

#### **Labor Market Information**

- Regional Jobs and Earnings Per Worker
- Regional Industries Providing Jobs
- Highest-growth Regional Industries
- Most Concentrated Regional Industries
- Most Competitive Regional Industries (Outperforming National Average)
- Critical Occupations in High-Growth Industries
- Major Occupation Groups, Region and State
- Top-Ranked Occupations by Total Jobs
- Top-Ranked Occupations by Total Growth
- Top-Ranked Occupations by New and Replacement Jobs

# ATTACHMENT A

## SCOPE OF WORK

### (CONTINUED)

#### **Analysis**

- Programs that Generate Significant Enrollment
- Programs that Generate Significant FTES
- Programs with High Success Rates
- Programs with High Retention Rates
- Programs with Low Success Rates
- Programs with Low Retention Rates
- Programs that Have Potential for Growth
- Programs that Have Declined in FTES
- Programs that Have not Grown
- Change in Student Demographics
- Industry in Area that will Provide for Employment Growth
- Necessary Training to Feed Labor Market
- Unmet Training Demand in Labor Market

#### **Growth Projections**

- Area Population
- Department of Finance Projections for the College
- Actual Growth Trend Calculated
- WSCH and Enrollment Projections
- FTEF Projection

#### **Capacity Load Projections**

- By Lecture
- By Laboratory
- By Office
- By Library
- By AV/TV

#### **College Trends and Forecasts**

- Enrollment Trends
- Success and Retention Rates
- Persistence Rates
- Degrees and Certificates Awarded
- By Ethnicity

- By Gender
- Transfers to Four-year Institutions
- Unit Loads
- Full-time Equivalent Students (FTES) Trends
- Full-time Equivalent Faculty (FTEF) Trends
- WSCH per FTEF

#### **Program Trends and Forecasts**

- Enrollment Trends
- Success and Retention Rates
- Degrees and Certificates Awarded
- Average Time to Complete Degree or Certificate
- Full-time Equivalent Students (FTES) Trends
- Full-time Equivalent Faculty (FTEF) Trends
- WSCH per FTEF by Program