



February 28, 2023

Mr. Steve Markiewicz
Associate Director of Planning and Construction
Indiana University of Pennsylvania
smarkiew@iup.edu

RE: Campus Plan Update

Dear Steve:

SmithGroup, Inc., (“SmithGroup”) appreciates the opportunity to continue our relationship with Indiana University of Pennsylvania (“IUP”) in the development and realization of the next-generation Campus Plan Update. On behalf of the SmithGroup, we are pleased to submit this proposal for the IUP Campus Plan Update in accordance with the Pennsylvania State System Higher Education (PASSHE). The following is our understanding of the services which are to be provided.

UNDERSTANDING OF THE PROJECT

Indiana University of Pennsylvania requests that the SmithGroup assist in the 2023 Campus Plan Update. SmithGroup has provided campus planning services to IUP for over a decade, including the 2011 Long Range Facilities Master Plan and Master Plan Revision, the 2014 Master Plan Revisions/Update, and the most recent 2017 Master Plan Revisions/Update.

Through our decade of work with IUP, SmithGroup has collaborated with leadership to craft the vision, framework, goals, guiding principles, and implementation strategies that have guided campus decision-making along the way. As Campus Planning leaders we understand the changing campus environment facing university leadership post-pandemic. Our Campus Planning experts understand the challenges facing universities today, including student (on-ground and virtual) enrollment, financial sustainability, operational and facility needs, academic programming, housing, diversity, equity, and inclusion. SmithGroup is energized by the opportunity to work with IUP through the next Campus Plan Update, assuring alignment with IUP’s Strategic Plan for 2020-2025, as well as the University Strategic Priorities.

sions and updated sections from the 2017 Campus.1 (onsBDC -22.231 -1.077 Td()TjEMC /P A MCID 22 BDC -0.03 Tc 0.03 Tw 0 -1.154 TD) Campus Framework Plan review and updates as required by PASSHE will include:

- o Physical analysis – Interface and relationship between the campus and community, and identification of the existing buildings. The SmithGroup will work with the university Project Manager to incorporate available high-level Facility Condition Assessments into our analysis.

Indiana University of Pennsylvania	Campus Plan Update Indiana, Pennsylvania	SmithGroup
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Student Collaboration and Gathering Space
 University Center
 Athletics
 Campus Support Services

Office space is one of the largest portions of the space portfolio, and the pandemic has significantly impacted the traditional workplace environment. Institutions have discovered ways in which remote or hybrid workplace strategies can be successful. The SmithGroup team will identify office space needs based on the application of metrics and employee titles.

1.2.3 Benchmarking

The SmithGroup team will benchmark peer institutions using comparative data. IUP and the SmithGroup team will jointly identify peer institutions and establish benchmarking criteria. The benchmarking will provide context and points of departure for discussion.

Academic Peer Benchmarking: We will compare IUP to between three (3) and five (5) similar institutions through metrics such as space per student, space per faculty, and instructional space per student. The SmithGroup team will only use data available from SmithGroup's internal data warehouses – we anticipate no new data gathering.

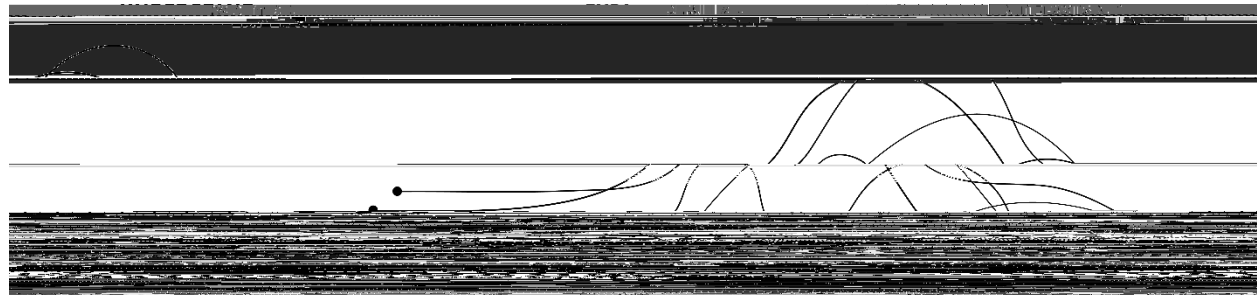
1.1.4 Dashboard

The SmithGroup team will provide a series of dashboard visualizations that incorporate the outcomes of space utilization and comprehensive space needs. This interactive tool allows the user to understand and explore these analyses at any scale and discover intersections. IUP can also sort this data based on room size to identify pinch points and opportunities in managing supply and demand. We will provide access to the dashboards for three (3) users for one (1) year.

SCOPE OF SERVICES 2: CAMPUS PLAN UPDATE

For ease in understanding our approach and process, we have divided our process into three phases. The intention is that each phase will build upon the previous phase to create ideas and products that provoke the imagination and generate excitement.

- Phase 1.0: Understand
- Phase 2.0: Explore
- Phase 3.0: Realize





2.1.2 Guiding Principles Review (ide. c. fe e. ce)

The SmithGroup team will meet the Steering Committee and select university leadership to share the Campus Plan Guiding Principles for review and comment. The primary objectives of this meeting include:
Introduce a draft of the Campus Plan Guiding Principles
Gain input on the range of options to explore as alternative scenarios

2.1.3 Alternative Development Scenarios

The SmithGroup team will prepare up to two (2) Alternative Development Scenarios that portray practical options for future development and change. The purpose of these scenarios is to evaluate, challenge, and/or validate existing studies and look at campus in new and different ways. These alternatives will be prepared to establish a common overarching vision for the physical organization of the campus. Each scenario will illustrate sustainable, realistic, and cost-effective options to address:

- Campus land use and organization
- Future development zones
- Building expansion/renovation and/or re-use
- Campus footprint reduction, including building demolition and campus acreage
- Optimal existing space for medical college classrooms, laboratories, and other space needs
- Potential locations for medical college housing
- Campus and community connections and integration
- Partnership opportunities
- Access and mobility patterns
- Indoor and outdoor student gathering, social, and study spaces including designated green space



terminology, metrics applied, and recommendations for optimization of existing space and additional or new space.

The Campus Plan Update may be formatted as an appendix to the 2017 Campus Plan Update should that be the preference of IUP– no edits to the 2017 Campus Master Plan document are anticipated.

The Campus Plan Update document will be provided in PDF format suitable for posting on the university website and printing. SmithGroup will also provide editable native format documents that IUP can use to later update the document.

ASSUMPTIONS

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SMITHGROUP TEAM

SmithGroup will be the contract holder with Indiana University of Pennsylvania for campus planning, space planning, and outreach.

ADDITIONAL SERVICES

SmithGroup will document requests for additional services or staff (if given verbally), and the work will commence upon Indiana University of Pennsylvania’s approval of an estimated fee for that effort or, if not agreed otherwise, Indiana University of Pennsylvania shall reimburse SmithGroup on an hourly basis of SmithGroup’s project staff actively engaged for all personnel hours worked on the project.

INTELLECTUAL PROPERTY

In rendering its Services, SmithGroup may create and provide to Indiana University of Pennsylvania documents which include (i) Indiana University of Pennsylvania internal data, analyses, recommendations, and similar items (collectively, “Client Data”), and (ii) data and/or recommendations that have been created by SmithGroup for the benefit of Indiana University of Pennsylvania as part of the Services (collectively, “SmithGroup Data”). In the development of SmithGroup Data, SmithGroup may use algorithms, software systems, plans, processes, tracking tools, contract assessment/ modeling tools, formulas, or data from third-party vendors, and other intellectual property owned by SmithGroup or which
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LIMITATION OF LIABILITY

NOTWITHSTANDING ANYTHING TO THE CONTRARY AND TO THE FULLEST EXTENT PERMITTED BY LAW, INDIANA UNIVERSITY OF PENNSYLVANIA AGREES THAT THE TOTAL LIABILITY OF SMITHGROUP IN CONNECTION WITH THIS AGREEMENT, WHETHER IN CONTRACT, TORT, NEGLIGENCE, BREACH OR OTHERWISE, SHALL NOT EXCEED AND SHALL BE LIMITED TO THE TOTAL COMPENSATION RECEIVED BY SMITHGROUP UNDER THIS AGREEMENT.

MISCELLANEOUS PROVISIONS

SmithGroup will use reasonable professional efforts and judgment in responding in the design to applicable federal, state, and local laws, rules, codes, ordinances, and regulations. Indiana University of Pennsylvania acknowledges that certain state and local laws, rules, codes, ordinances, and regulations may reference standards that are outdated and/or contrary with today’s industry requirements. SmithGroup cannot and does not warrant or guarantee that the Project will comply with all such outdated and/or contrary federal, state, and local laws, rules, codes, ordinances, and regulations.

Notwithstanding anything to the contrary, nothing contained herein shall be construed: i) to constitute a guarantee, warranty or assurance, either express or implied, that the SmithGroup’s Services will yield or accomplish a perfect outcome for this Project; or ii) to obligate the SmithGroup to exercise professional skill or judgment greater than the standard of care exercised by other similarly situated design professionals currently practicing in the same locale as this Project, under the same requirements of this Agreement; or iii) as an assumption by the SmithGroup of liability of any other party.

SmithGroup will use reasonable professional efforts and judgment to interpret applicable ADA requirements and other federal, state, and local laws, rules, codes, ordinances, and regulations as applicable to this Project. Indiana University of Pennsylvania acknowledges that requirements of ADA, as well as other federal, state, and local laws, rules, codes, ordinances, and regulations, will be subject to various and possibly contradictory interpretations. SmithGroup cannot and does not warrant or guarantee that the Project will comply with all interpretations of the ADA requirements and/or the requirements of other federal, state, and local laws, rules, codes, ordinances, and regulations.

Thank you for contacting SmithGroup. We look forward to working with Indiana University of Pennsylvania on this project.

