Date: March 24, 2023

Subject: **Interview Notice**
          Professional Design Services for Waring Commons Programming Study
          Penn State – University Park Campus
          Penn State Project No. 00-07032.00

To: Cooper Carry
          Solomon Cordwell Buenz (SCB)
          William Rawn Associates

The Screening Committee met to determine the Short-List and selected the above three (3) teams who will be interviewed for the project at the Penn Stater Hotel and Conference Center in State College, PA on **May 1, 2023**. The random order for the interviews is as follows:

Team	Time	Location
William Rawn	9:45 AM – 11:10 AM	TBD (Penn Stater Room A)
Cooper Carry	11:20 AM – 12:45 PM	TBD (Penn Stater Room B)
SCB	1:30 PM – 2:55 PM	TBD (Penn Stater Room A)

The interview rooms will be available half an hour before the team's assigned time – equipped with a projection screen for the team's use and connectivity via laptop (IBM compatible) or USB thumb drive. Projector, access to the internet, or other technology needs are the team's responsibility. Teams can correspond with The Penn Stater directly for assistance. Please bring an extra copy of the team's presentation, on a thumb drive, for Penn State's use.

Interview Format

The interview format will be a 45-minute presentation (including the team's introductions), followed by a 40-minute question and answer session. If there is time after Q+A, the team may use the time for closing thoughts or statements.

The team should clearly describe why they are the best team for the project, including explaining the team's differentiators. As a part of the presentation, we request that you address the topics outlined below. Present this information in any arrangement, format, and topic duration that suits your team.

Please limit the team's attendance to a maximum of four (4) people. We strongly prefer to meet with the key contacts for the project that will be working with us regularly. Executive-level representatives who will not participate actively in the study should not attend.

Interview Topics

1. Team Introduction and Experience

   - Briefly introduce each team member and their role in the project. Note any changes from the

proposal.

- Review the overall team's organizational chart and identify the role of key team members/ consultants. Note any changes from the proposal.

- Demonstrate the team's unity by showing examples of your most relevant past work that was executed by the proposed team. Discuss why the project is relevant to the Waring Study project, how the team achieved success, and define who did what on the example project. Discuss why the work is germane to our study.

2. Project Approach

Present the team's best practices that lead to project success, including, but not limited to:

- Stakeholder engagement to determine project requirements and decision-making processes, including:
  - Define your process of creating actionable project goals/drivers. And once established, how will you help us measure options and ideas, including in comparison to the drivers/goals.
  - What you will need from Penn State, the importance of our role in the team's process, and how the client/ users are inextricably involved.
  - How the architectural, engineering, and food service teams will interact with each other and with project stakeholders at different project stages to make key decisions.
  - The criteria and approach to establishing priorities and making decisions.
  - Which team members will lead critical project efforts, tasks, phases, etc. - specifically, who will lead.
  - How much district-level planning would be involved in the process of this project? What is the process?
  - How have you identified the operational flow of goods and people in a complex facility like Waring and how do you communicate and test it?
  - Discuss if you have helped other owners define the "business case" of a project. Have you reviewed staffing needs for program choices, including evaluating the impact of location and adjacencies?

- Engineering approach:
  - How has this team reviewed buildings to determine the feasibility of modifying the structure to facilitate volumetric changes and additions or subtractions?
  - The team's overall approach to any technical considerations, MEP or building system design, and achieving PSU's high performance and sustainability standards.
  - How can the MEP scope (and related costs) be managed throughout the life of the study and project?
  - What is the process, and who is leading the planning and design efforts related to

utilities for this project?

3. Project Schedule/ Staffing

    Describe the team's approach to achieving the project schedule, including:

    - The team's overall impression of the schedule: Is it achievable? Are there any changes the team would suggest?

    - Critical path items, milestones, risks, and schedule drivers.

    - The team's availability, especially considering other projects and firm workload.

    - How would the team leverage virtual meetings, interactive tools, and similar technology to their most significant benefit during the project's programming, design, and construction phases?

4. Cost Development

    Describe the team's cost development approach, including, but not limited to:

    - Integrating cost estimating with option development to drive to actionable results. How will estimating be managed dynamically throughout the study?

    - Managing unknowns inherent in predesign to allow for the development of numbers that can foster reliable planning.

    - Understanding escalation and uncertainty of timing, relative to project implementation, for costs developed in the study phase. How can the study provide guidance in the post-study timeframe?

    - Consideration of life cycle costs. What is appropriate and achievable during the study phase? What conversations related to this topic are germane in predesign and recommended for this study?

5. Project-Specific Considerations, Program, and Project Goals

    - Provide a project understanding with the team's impression of the provided project information.

    - From a programmatic perspective and specific to the project site, discuss ways to plan for a flexible/adaptable/vibrant/successful facility.

    - Many of the building's requirements involve competing interests, such as different program types. How will the team navigate these competing interests?

    - Identify other likely competing priorities and possible ways to address these issues in the study process.

    - Describe how the team will explore different building planning ideas that will "test" various options. This will include renovation options up to new construction options.

    - Highlight some of the team's best flexible student commons and dining facilities (front and back of house) and attributes to consider when planning such a facility.

- Discuss trends and/or benchmark data specific to this project type and/or program.

6. Campus Drivers

- Discuss the site, including existing conditions and context, building siting/massing, sustainability, and ways to best connect the site to the overall campus.

- Discuss site approach/entry options and the design impact of new or modified campus connections.

RESPONSE CONDITIONS

- Participation in this selection process by submitting firms is voluntary and shall be at no cost or obligation to Penn State.

- Penn State does not obligate itself to make the selection for these Professional Services based on lowest cost and reserves the right to reject all responses and to hold proposals for a minimum of forty-five days. Penn State further reserves the right to waive any irregularity in any or all responses, and to reject or accept any response or portion thereof. Our intent is to identify the firm that provides the best fit with our perceived need. This firm will balance experience, service, quality, and cost.

- News releases pertaining to this project will not be made without prior approval from Penn State, and then only in coordination with Penn State. The contents of all selection process correspondence and material are to remain confidential, and as such, not be made public.

- It is our intent to issue a 1-S Form of Agreement for this project. By participating in this selection process, the Professional is acknowledging that they concur with, without exception, the terms, conditions, and provisions as contained in Penn State's "Form of Agreement 1-S." Current version available on the OPP website.

- After selection, the Penn State Facility Project Leader will be Penn State's point-of-contact for the Professional for all matters related to the project and is the only person authorized to provide direction to the Professional.

- The Professional is responsible for making all parking arrangements. Penn State is not responsible for any citations or parking violations incurred by the Professional.

- If it becomes necessary to revise any part of this notice an amendment will be posted on the selection website.

We are providing the following documents to help with the team's preparation for these interviews:

- **Sample Interview Room layout**

- **Non-Binding Professional Fee Form.** Complete and email to Greg Kufner at gak21@psu.edu by noon EST on **April 27, 2023.**

The result of the interviews will be emailed to the Short-Listed Team shortly after the interviews and published on the PSU OPP website. Questions shall be submitted to us in writing via email, our addresses are listed below.

Thank you for your participation in this process. We look forward to meeting you at the interviews.
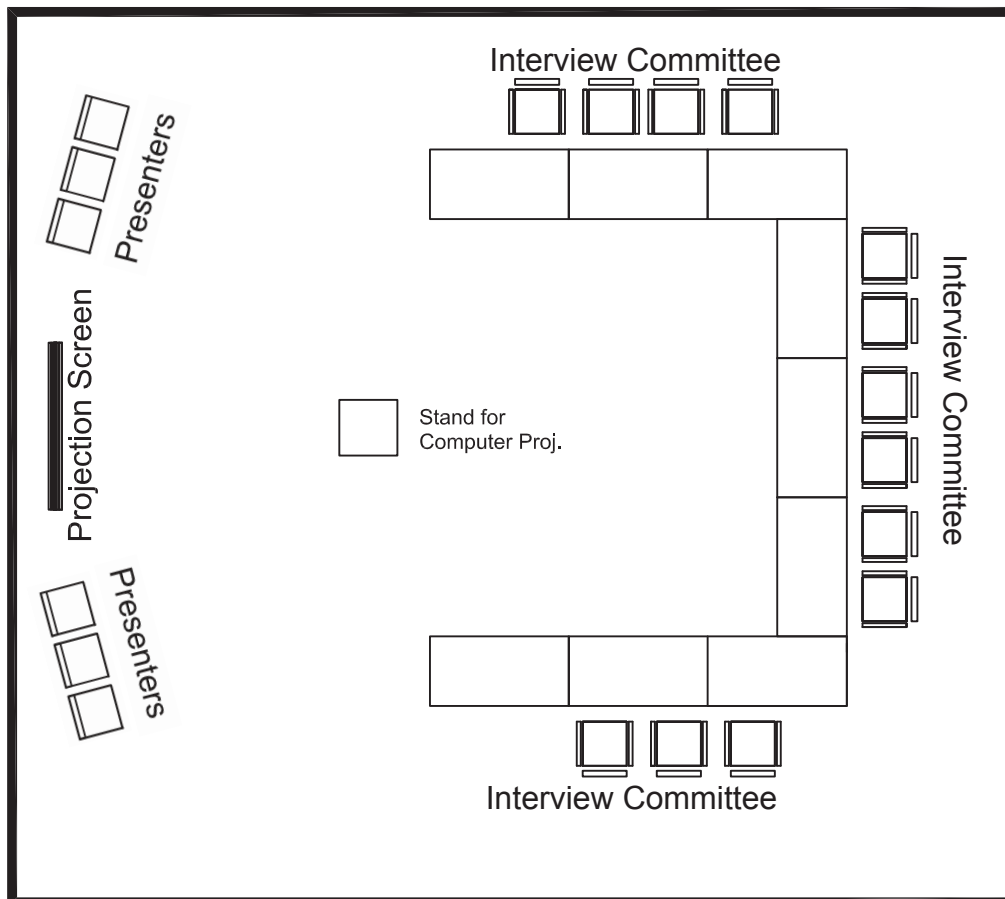
Kindest Regards,

Greg Kufner, AIA, NCARB, University Architect
Office of Physical Plant, The Pennsylvania State University
Direct: (814) 865-8177, Mobile: (614) 512-2287, Email: gak21@psu.edu

Richard O'Donald, RA, CEFP, CDT, Facilities Project Manager
Office of Physical Plant, The Pennsylvania State University
Phone: 814-865-1333, Mobile: (814) 826-8457, Email: reo100@psu.edu

CC: Screening Committee

Penn State
A/E Team Selection
Example Interview Room Layout

Interview Committee

Presenters

Projection Screen

Stand for
Computer Proj.

Interview Committee

Presenters

Interview Committee

Subject: **Non-Binding Professional Fee Form**
Professional Design Services for Waring Commons Programming Study
Penn State – University Park Campus
Penn State Project No. 00-07032.00

Firm Name: _____

Projected Hours: _____

Proposed Fee: _____

Services included: _____

_____

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Services excluded: _____

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Notes:

- Return form as noted in Interview Notice.

- We are looking for a comprehensive and complete proposal. Include in your fee all services you anticipate providing for this study. Including the fee(s) of your subconsultants.

- No separate reimbursable expenses will be included in the (standard Penn State 1-S form of) agreement. Include all expenses in the proposed fee.

- Firms will be ranked based on the interviews. Fees will only be considered if there appears to be a major discrepancy between the provided fees.

- In addition to the above, please include a listing of your billable rates that will be used for this project.