1. **STATEMENT OF PURPOSE:**

The State of Tennessee, Tennessee Higher Education Commission issues this Request for Information ("RFI") for the purpose of defining the parameters and scope of a future Request for Qualifications (RFQ) for facilities planning services. We appreciate your input and participation in this process.

2. **BACKGROUND:**

The Tennessee Higher Education Commission (THEC) provides leadership in public policy development for higher education in Tennessee, from ensuring fair and equitable funding of the various public institutions to managing growth in a way that ensures the efficiency of state appropriations.

Among the Commission’s statutory responsibilities are: strategic planning for Tennessee postsecondary education; reviewing and approving new academic programs; setting binding tuition ranges for public institutions; developing formulae and recommending the operating and capital budgets for public higher education; providing data and information to the public, institutions, legislature, and state government; and providing authorization for private postsecondary institutions operating within the state.

The Commission coordinates public institutions of higher education, comprising two (2) systems and six (6) independent universities: the University of Tennessee institutions, governed by the University of Tennessee Board Of Trustees, the community colleges and the Tennessee Colleges of Applied Technology (TCATs), governed by the Tennessee Board of Regents, and six (6) locally governed institutions (LGIs). As of July 1, 2021, there will be ten (10) public universities, 13 community colleges, and 27 TCATs in Tennessee that serve nearly 248,000 students collectively.

The FOCUS Act altered the governance structure of higher education in Tennessee by giving the six (6) universities previously under the Tennessee Board of Regents (TBR) independent governing boards (now the LGIs). Concurrent with the implementation of the Tennessee FOCUS Act, THEC has been engaged in the development of capital budget processes, capital project management resources, and improvements to facilities planning resources on behalf of all state public higher education institutions. THEC seeks to continue to develop internal and external resources that will yield high-quality academic facilities within available state resources.

3. **THEC Space Study**

In consideration of the extraordinary events of the past year, THEC intends to issue one (1) or multiple procurement request(s), and ultimately award at least one (1) multi-year contract for a facilities utilization
study and related ongoing professional services. The study will measure the utilizations of core academic spaces and will make recommendations to institutions and THEC that will improve the quality and efficiency of academic spaces and workspaces. Ultimately, THEC intends to develop capital strategies that support the highest and best use of campus facilities in a post-COVID environment. THEC invites respondents to comment on the goals and tasks envisioned for study for the purpose of developing an RFQ for these professional services. Responses may include, but not be limited to:

- Comments and suggestions on related goals and tasks listed in this RFI;
- References to other known states’ studies or system processes relevant to this study;
- References to similar studies conducted by the respondent, and a proposed scope of services for the study;
- Typical scopes of services for similar utilization studies that would be appropriate for this scale of statewide academic facilities.
- Trends in course delivery methods and best fit to classroom and labs, improvements to the balance of academic space types, design, and utilizations, and how the RFQ may articulate the requisite services;
- Strategy for establishing processes to measure and analyze improved efficiencies;
- Defined metrics/data to be provided by institutions and THEC to complete the study;
- Suggestions as to how the scope of the study may be defined to yield the best results within defined parameters, and within reasonable costs; and,
- Speculative cost range for the study (min-max), given certain parameters defined by respondent.

**Study Goals:**

1. Measure and improve the utilization of primary Education and General (E&G) formula spaces, especially classrooms, class labs, large lecture rooms, and offices;
2. Update the THEC Space Guideline formulas designed to predict E&G formula space needs, reflecting trends in space usage; update reporting processes to support capital requests and evaluation of improvements to space efficiencies; and,
3. Provide research, support data, analysis, and training for institutions to produce high quality, successful educational environments in a post-COVID environment.

**Goal 1: Improve Utilizations**

1. **Classroom Utilization**
   a. Implement a comprehensive utilization study of classrooms and labs for THEC public universities, community colleges, and TCATs based on Fall 2019 and Fall 2021.
   b. Provide executive summary of utilizations on a per campus basis, and make recommendations to maximize utilizations, and improve mix of classroom/lab quantities, capacities, and types. Review classroom and lab scheduling policies, potential future revisions towards hybrid/online coursework, and make recommendations to improve utilization of spaces.
   c. In consideration of evolving coursework delivery methods (online, hybrid, in-person), and corresponding evolving classroom designs, create a template for future periodic utilization studies/reports that may be conducted internally by institutions and THEC. Determine timelines, format of metrics, and analytics template.

2. **Office Utilization**
   a. Recommend methodology for institutions to monitor office work policies, measure their utilizations, and incentivize development of effective and efficient workspaces for faculty and staff.

**Goal 2: Improve Metrics**
1. Revise or Update THEC Space Guidelines
   a. Document contemporary research on best fit of pedagogy/delivery method, and space types to produce most successful educational outcomes.
   b. Revise THEC Space Guidelines (see Resources); consider evolution of space needs post-pandemic, including trends in hybrid and fully online coursework, active learning, space flexibility, collaborative work areas, library space and community one-stop functions, office utilizations, large lecture halls, other changing space needs.
   c. Provide updated THEC Space Guidelines and corresponding excel workbooks to calculate space needs.

2. In consultation with THEC, develop 1) survey template(s) to be completed on a prescribed schedule by institutions, beginning Fall 2021, to measure and track utilizations and efficiencies in formula spaces, and 2) reporting templates that will document progress for improved space utilizations by type by institution.

Goal 3: Institutional Training and Support

1. Over as long as a five (5) year period:
   a. Provide ongoing consultation to THEC and institutions to recommend best fit of classroom types and designs with emerging pedagogies that will support the most successful educational outcomes.
   b. Provide ongoing research, support data, analysis, and training for institutions to support transitions in space use needed to have high quality, successful educational environments in a post-COVID environment.

Note: The listing below is a general reference to the listing of the state institutions that will be included in the study, and also to the planning guidelines that are now in place and may be revised as part of the scope. They do not need to study them for this response, it is only a reference available if they need it. These documents will also assist in their understanding of the scope and scale of the study.

State Institutions
- THEC
  - THEC Fact Book 2020
  - THEC Master Plan Update 2020
- University of Tennessee
  - UT Knoxville
  - UT Chattanooga
  - UT Martin
  - UT Southern (formerly Martin Methodist)
- Tennessee Board of Regents
- Austin Peay State University
- East Tennessee State University
- Middle Tennessee State University
- Tennessee State University
- Tennessee Tech
- University of Memphis

Resources
- THEC Master Plan Guidelines
- THEC Space Guide – Universities 2020
- THEC Space Guide – Community Colleges 2020
- THEC Space Guide - TCAT 2020
4. COMMUNICATIONS:

4.1. Please submit your response to this RFI to:

Amber Walsh, Legal and Administrative Specialist  
Tennessee Higher Education Commission  
312 Rosa L. Parks Ave., 9th Floor  
Nashville, TN 37243  
615.532.3500  
Amber.Walsh@tn.gov

4.2. Please feel free to contact the Tennessee Higher Education Commission with any questions regarding this RFI. The main point of contact will be:

Amber Walsh, Legal and Administrative Specialist  
Tennessee Higher Education Commission  
312 Rosa L. Parks Ave., 9th Floor  
Nashville, TN 37243  
615.532.3500  
Amber.Walsh@tn.gov

4.3. Please reference RFI # 33201-04421 with all communications to this RFI.

5. RFI SCHEDULE OF EVENTS:

<table>
<thead>
<tr>
<th>EVENT</th>
<th>TIME (Central Time Zone)</th>
<th>DATE (all dates are State business days)</th>
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</thead>
<tbody>
<tr>
<td>1. RFI Issued</td>
<td></td>
<td>July 1, 2021</td>
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<tr>
<td>2. Written Questions and Comments Deadline</td>
<td></td>
<td>July 7, 2021</td>
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<tr>
<td>3. State Response to Written Questions and Comments Deadline</td>
<td></td>
<td>July 9, 2021</td>
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<td>4. RFI Response Deadline</td>
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<td>July 19, 2021</td>
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6. GENERAL INFORMATION:

6.1. Please note that responding to this RFI is not a prerequisite for responding to any future solicitations related to this project and a response to this RFI will not create any contract rights. Responses to this RFI will become property of the State.
6.2. The information gathered during this RFI is part of an ongoing procurement. In order to prevent an unfair advantage among potential respondents, the RFI responses will not be available until after the completion of evaluation of any responses, proposals, or bids resulting from a Request for Qualifications, Request for Proposals, Invitation to Bid or other procurement method. In the event that the state chooses not to go further in the procurement process and responses are never evaluated, the responses to the procurement including the responses to the RFI, will be considered confidential by the State.

6.3. The State will **not** pay for any costs associated with responding to this RFI.

7. **INFORMATIONAL FORMS:**

The State is requesting the following information from all interested parties. Please fill out the following forms:

<table>
<thead>
<tr>
<th>RFI #NUMBER</th>
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<tbody>
<tr>
<td>TECHNICAL INFORMATIONAL FORM</td>
</tr>
<tr>
<td>1. RESPONDENT LEGAL ENTITY NAME:</td>
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<tr>
<td>2. RESPONDENT CONTACT PERSON:</td>
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<td>Name, Title:</td>
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<td>Address:</td>
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<td>Phone Number:</td>
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<td>Email:</td>
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<td>3. Describe the primary capabilities of the firm to conduct a state-wide classroom utilization study, and to review and update the THEC Space Guidelines. Please be specific as to aspects of the RFI that the firm is capable of completing.</td>
</tr>
<tr>
<td>4. Briefly describe similar utilization studies and/or similar state-wide space formula reviews conducted by your firm for other state systems. Note points of contact at respective state systems if available.</td>
</tr>
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</table>

| COST INFORMATION FORM |
| 1. Describe what pricing units you typically utilize for similar services or goods (e.g., per hour, each, etc.): |
2. Cost ranges - Describe a cost range that would be typical for a study of this type; please qualify the response.

3. Pricing arrangements - THEC will likely structure project to bill by task, by percentage completion. Please provide other billing considerations if applicable.

4. How may the scope be developed to best address primary academic space utilizations to produce the most effective outcome within a reasonable cost range?

5. Estimated time frames - How long may a study of this type take to complete? What are the primary sequences of work and rough estimate of potential timeline?

ADDITIONAL CONSIDERATIONS

Please provide input on alternative approaches or additional things to consider that might benefit the State.

Scope of Work and RFQ - Describe the typical scope of work requested in similar RFQ or RFPS for similar University and/or state-wide utilization studies.

Scope tasks and categories - Describe how the work may be subdivided to apply to the sequence of work, and specific work tasks.

Outcomes - Describe the expected outcome that may be accomplished with a utilization study. How may the results be used by the institutions, and by THEC, to improve space efficiencies and space quality?

Data - List typical data that would be requested by the firm from THEC and/or institutions to complete the study. (This may be an attachment.) Are there any unique data fields that will be needed for Fall 2021 such as hybrid course class occupancies, or flexible attendance policies etc. that may not be commonly available? How can THEC prepare the institutions for Fall 2021 data collection to support the study?

Post COVID - Describe utilization measures that may be appropriate to consider as part of the scope of work in consideration of space usage post-COVID, such as shifts in classroom types, or office usage. How may these measures yield information that may help guide institutions’ planners for future space use and space types?

THEC Space Formula - If the firm is familiar with the THEC Space Formula, what are the categories of the formula that may benefit from a review and update.

Potential problems/risks - Describe challenges or roadblocks to the completion of such a study that should
be considered.

Interest in responding to a future solicitation - Will the firm be interested in responding to a future solicitation for the study? Are there any particular considerations of the scope that may affect a decision to respond?

ADDITIONAL CONSIDERATIONS

Please provide input on alternative approaches or additional things to consider that might benefit the State. Are there other comments about the scope or intent of the study that may be helpful in consideration of the development of an RFP/RFQ?