

Conceptual Design Services for the Enhancement of the

University Campus Master Plan

University of Lethbridge Main Campus

4401 University Drive Lethbridge, Alberta Canada T1K 3M4



*University of Lethbridge Core Campus Expansion Plan (2001)
Brook McIlroy Planning + Urban Design*

Key Dates:

RFP Closing Date: Friday at 3:00pm MDT on May 6, 2011
Anticipated Final Award Date: Approximately May 20, 2011
Anticipated Start-up Period: Week of May 23, 2011



Conceptual Design Services for the Enhancement of the

University Campus Master Plan

at the University of Lethbridge main campus.

RFP-S2011-2319

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Selection Process Initiated | March 10, 2011

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1 Project Summary

1.1 Introduction

The University of Lethbridge, hereafter referred to as the Owner or the University, invites short-listed planning, urban design and architectural firms and their proposed sub-consultant teams to submit proposals to provide conceptual planning services that enhance the existing *Core Campus Expansion Plan* prepared by Brook McIlroy Planning + Urban Design in November of 2001. The continued development of this plan is to also align with the goals of the University's current 2011-2015 Capital Plan as well as key directives of the 2009-2013 Strategic Plan in force which aim to:

- Confirm our Place as a Comprehensive University;
- Enhance the Student Experience;
- Build Internal Community and Enhance Relationships with External Communities;
- Promote Access to Quality Post-Secondary Education;
- Enhance the Environmental Sustainability of the University

The University of Lethbridge campus is located on the west bank of the Oldman River across from the city's centre in Lethbridge, Alberta. The campus site occupies a distinctive coulee landscape rising from the river below to an extensive plateau area approaching University Drive, the primary transportation corridor to the west of the city centre. The existing expansion plan of the academic and research precincts occur on this plateau to the north, west and south of the current core campus facilities.

The University of Lethbridge master plan was conceived as a complex where formal teaching occurs through large lectures and intimate seminars, and where 'academic' spaces are integrated with living spaces of various kinds so that learning becomes part of living.

Consideration of the academic goals and policies of the university and extensive review of the natural features of the site itself, including climate, topographic form, vegetation, soils and other aesthetic qualities, led to the solution of housing lecture theatres, classrooms, seminar rooms, laboratories, faculty and administrative offices, student residences, and public areas all in one building.

The building fits into the undulations of its site using the contours to its advantage and for its own purposes so that the building height varies while its roof line remains constant: a flat plane that hardly rises above the line of the horizon. It is a very large structure - 912 feet long, 9 storeys high - and stands in the midst of an almost barren landscape. The building had to be a bold statement. The unity of function within one building is also very important in addressing Lethbridge's fairly rigorous northern climate - windy, snowy winters, moderated by the occasional warm Chinook winds and quite hot summers.

Statement of Arthur Erickson, University Architect (1969)
www.arthurerickson.com



University Hall, Erickson Massey Architects, 1971.

The University of Lethbridge continues to expand with significant increases in student enrolment, coupled with major construction. For the last six years the student population at the main campus has been increasing at an average annual growth rate of nearly 2% and future growth is expected to continue at a similar rate. The university's mandate is to accommodate growth at our core campus from the current 7,300 student population to a total population of 11,000 students, not including potential development capacity at our south campus.

Continuation planning for the conceptual design

of our four precincts which comprise academic, research, residential and athletic areas is required to successfully guide the expansion of our physical facilities to meet the requirements of a student population of 11,000 and to facilitate a plan to accommodate reserve space for possible future expansion beyond this student population. The new plan will also formally examine potential uses of our south campus where our new stadium facilities currently are located for the first time.

The campus master plan is also integral to providing a quality educational experience for our students which further enhances opportunities for the University to integrate with the broader community and facilitate a unique sense of place that makes the institution a destination University.

1.2 Overall Objectives

The overall objective of this planning project is to re-affirm and enhance the framework of the existing *Core Campus Expansion Plan (2001)* and reassess the configuration, program and quality of our campus precincts. In doing so, this project seeks to identify, emphasize and strengthen the attributes that make our campus unique from other post-secondary institutions and which communicate a consistent unifying vocabulary in our built environments and development landscapes. As a mechanism to this end, the project will include a continued elaboration on fundamental campus design guidelines that also respond appropriately to our prairie landscape and coulee setting.

The selected *Prime Consultant* and *Consultant Team* shall respond to the project requirements of the University and provide implementation strategies or solutions which establish a comprehensive master plan, elaborate on campus design standards, and

recommend a process by which the master plan and design guidelines can be enforced.

In the context of an analysis of future enrolment, the project objectives will continue to identify buildings and 'public realm' spaces that will be required to accommodate anticipated growth. The updated master plan will continue to examine the location and massing of new buildings, their relationships to each other and to existing campus facilities. The updated plan will emphasize pedestrian access and cross campus circulation networks and confirm minimum parking needs, vehicular routes and utility or infrastructure requirements associated with anticipated new development plans.

Implementation will require a familiarization with the campus and a review of previous studies, followed by a review of the work plan with the *University Campus Plan Steering Committee* to ensure that the work plan meets the specific needs, issues and concerns of those involved.

Consideration should be given to whether modifications to the academic, research, residential and athletic facilities precincts identified in the *Core Campus Expansion Plan* remain appropriate to optimize the university's academic, administrative, athletic and cultural mandates on our main campus.

student and campus community base. It is expected that the *Prime Consultant* will meet all proposed deadline stages and provide a professional standard of care.

Please refer to the next section for the anticipated project scope and a more detailed description of the required consulting services.

1.3 Consulting Services

Consulting services are required for various planning phases to consist broadly of preliminary investigations of previous planning efforts (pre-design), conceptual (or schematic) design, design development and documentation production. As is typical with planning projects of this nature, the schedule anticipates key stakeholder input sessions, workshops and open house forums for input from the



View of University Hall from opposing coulee (1971).

`...the academic building could span the coulees and, like the old bridge in its rigid flatness, reveal the rich contours of even the most level prairie. It seemed to me that the top storey of the university should lie below the tableland in an uncompromising straight line spanning the haunches of the prairie...`

Arthur Erickson, 1967

2 Project Scope

2.1 Consultant Team Tasks

Specific tasks to be performed by the *Consultant Team* will include, but are not limited to, the following outline scope:

1. Consultation with the University to confirm the requirements of the work with respect to project intent, time schedules and compliance with the preliminary project scope as detailed herein.
2. Submission of a tentative schedule of work for approval of the University, prior to the commencement of work.
3. Review existing relevant information provided by the University including previous studies, reports, engineering analysis, master plan documents, campus statistics, etc.
4. Research recently developed master plans from other post-secondary institutions to supplement your knowledge and information to the options and recommendations. These may include the following master plans which representatives of the University have also familiarized themselves:
 - ♦ University of British Columbia
www.campusplan.ubc.ca
 - ♦ University of Regina
www.uregina.ca/physplnt/masterplan/index.shtml
 - ♦ University of Calgary
www.ucalgary.ca/campusmasterplan
5. Initiate a consultation process with both the *University Campus Plan Steering Committee* (UCPSC) and various user groups to gather input on potential planning requirements. Identify current deficient and emergent planning needs and University and community priorities.
6. Be familiar with applicable regulations, codes or restrictions of any authorities having jurisdiction, and other factors related to the execution or ultimate plan of the project.
7. Present concepts at appropriate stages to the UCPSC and various stakeholders for review and recommendation.
8. Develop chronological implementation strategies or development phases and recommendations.
9. On the UCPSC's approval, submit to the University a written master report describing the full breadth of the updated campus master plan in detail.
10. The Consultant will be required to prepare presentation boards and other appropriate media for open house forums and to make presentations to the University Board of Governors or key groups as necessary.



Above grade pedestrian tunnel nicknamed “the worm” connecting upper & lower campus (removed in the late 1980’s).

2.2 Specific Planning Objectives

Expanding from the *Statement of Qualifications* (SOQ) phase, utilizing the previous *Core Campus Expansion Plan (2001)* as the primary framework, the Campus Master Plan shall:

- ◆ Relate to all areas that comprise the main campus property including all precincts of the plateau areas to the north, west and south of the current grouping of facilities.
- ◆ Analyze the capacity of existing facilities to accommodate growth and determine the required capacity of new building space.
- ◆ Identify areas within the academic precinct that should be reserved to accommodate growth beyond a 11,000 student campus population, and estimate the expansion capacity of these reserved areas.
- ◆ Determine boundary edges of major precincts and re-affirm the logical grouping of academic, administrative, athletic, cultural and other support space to accommodate staged growth.
- ◆ Over a period of 25 years, communicate a logical and effective implementation plan of building expansion, identifying the suggested phasing of growth at appropriate intervals in a manner which minimizes disruption or repeat relocations.
- ◆ Examine existing and potential networks for new outdoor open spaces that improve the public realm of campus and which address various commons typologies and scales and are appropriate to our climate.
- ◆ As appropriate for each precinct, redefine and further develop *Campus Design Guidelines* for architecture (building design) and open ‘public domain’ spaces, connections and surface infrastructure (landscape design) which respond to and enhance the unique qualities of our prairie coulee landscape setting. These guidelines should expand upon the *Core Campus Expansion Plan* to include various key elements such as a description for architectural character or expression that reinforces a sense of place and which showcases research or academic symbolism, social, economic and ecological sustainability, reinforces pedestrian movement, barrier-free design and accessibility, preserve key views, recommend planting guidelines and sustainable best practices in building design (i.e. passive design, orientation, shape, height limit and massing, wind and solar optimization, space planning, glazing ratio, durability, indoor environmental quality).
- ◆ Develop a concept plan within campus precincts that will provide for safe, convenient and logical pedestrian routes between building complexes and natural ‘knowledge’ areas in a networked campus and recommend suitable treatment of these routes. Designate primary ceremonial routes for special events, processions and commemorations. Pedestrian routes and pathways should be clearly defined in the design guidelines in terms of acceptable site furnish-

ings, lighting, banners and way finding signage. The concept plan is to recognize the need for a more pedestrian focused campus perceived to be less dominated by the automobile or parking locations and which maintain the movement of students between classes to various destination points within a 10-minute walking interval.

- ◆ For each identified precinct, determine the appropriate development density required for a sustainable campus growth of 11,000 students.
- ◆ Isolate and reaffirm signature campus building sites while preserving 'Sacred Sites' identified in the previous plan and recommend appropriate uses.
- ◆ Elaborate upon existing landscaping guidelines to provide continuity between buildings and amplify our distinctive prairie landscape setting in a manner that is compatible with our unique topographic and climatic conditions.
- ◆ Recommendations related to buildings must generally recognize the impact of building form, orientation, enclosure and exterior finishes on mechanical and electrical building systems and ultimately operating costs, and apply the model National Energy Code for Buildings as a means of achieving a healthy balance between capital and life cycle costs of building structures to minimize future operating costs.
- ◆ Review and recommend suitable locations, massing and setbacks for proposed buildings or structures in relation to the academic, research, administrative, and support space growth anticipated during anticipated phases of university growth.
- ◆ Identify an appropriate circulation system for preferred routing of vehicular traffic to accommodate traffic through campus, shipping/receiving/service vehicle flows, and public access to major events spaces and buildings on campus.
- ◆ Make recommendations on the enhancement of primary entrance routes and gateways which announce the institution to the community and support the University image or brand.
- ◆ Provide detailed recommendations for the University's building expansion requirements and contemplated new facilities. At this time, the 2011-2015 Capital Plan identifies the following future building and capital improvement projects on our main campus:
 - Science Complex Facility
 - Central Plant Facility
 - Tunnel and South Plaza Rehabilitation
 - Administrative Office and Classroom Complex
 - New Student Residences (Aperture Park)
 - Central Dining Facility (Residences)
 - Cultural Art Gallery & Performance Centre
 - Art Collection & Visual Study Facility
 - First Nations Gathering Centre
 - Distributed Learning Centre
 - Research Transition Facility
 - Alberta Water & Environmental Sciences Building - Phase Two
- ◆ Further develop an implementation plan for synchronizing an extension of utility services through and between buildings in conjunction with new construction, in a way that allows central servicing for building utilities and minimizes utility expenditures.

2.3 Proposed Process & Timelines

The project calls for a proposed six phase planning and consultation process over a period of ten to twelve months to commence on the dates below. We anticipate this work plan to have input from the se-

lected consulting team and to be jointly formalized during the first implementation phase. The proposed work framework is as follows:

Phase I (Pre-Design)

Implementation | May 20, 2011 (4 weeks)

- Award of Project
- Existing Core Plan and Policy Analysis
- Define Scope, Work Plan & Budget
- Planning Process Development + Finalization

Actions:

- Consultant Start-up Workshop
- Implement Campus Plan Website + Social Media

Phase II (Schematic Design)

(re)Discovery | June 20, 2011 (6 weeks)

- Identify Issues and Ideas
- Built Form & Campus Legacy Review
- Campus Precincts & Districts Review
- Access, Movement & Parking Analysis
- Review Student Housing Demand Forecasts

Actions:

- Implement Campus Plan Website + Social Media Site

Phase III (Schematic Design - Continued)

The Future | August 2, 2011 (6 weeks)

- Comparative Campus Planning Study
- Vision & Outcome Statement

Actions:

- Open House I – Community Outreach
- Focus Groups
- Campus Plan Website - Online Feedback Form

Phase IV (Design Development)

Conceptual Alternatives | Sept. 12, 2011 (6 weeks)

- Sustainable Campus Visioning and Priorities
- Public Realm Improvement Plan
- Campus Gateway Study

Actions:

- Open House II – Plan Alternatives (Community Outreach)
- Campus Plan Website - Online Feedback Form

Phase V (Documentation & Feedback)

Draft Master Plan | Oct. 24, 2011 (14 weeks)

- Draft Campus Plan
- Design Guideline Development

Actions:

- Open House III - The Draft (c/w discussion guide & feedback form)
- Campus Plan Website - Online Feedback Form
- Complete and Submit Draft Campus Plan

Phase VI (Presentation)

Adopt the Master Plan | January 30, 2012 (3 weeks)

- Presentation of Master Plan to Board of Governors

(Adoption of plan subject to University Campus Plan Steering Committee and University Board of Governors approval)

2.4 Deliverables

The deliverable will be an updated Campus Master Plan report which can be implemented incrementally as growth occurs and funding is secured. The plan will include an assessment of existing conditions and deficiencies, a long range plan coupled with an implementation plan identifying immediate and staged expansion, and a framework for examining future changes on campus to ensure that they fit within the plan and do not precipitate other problems.

2.5 Cost Control

If it is deemed to be of particular value to the conceptual design process, after some discussion, the University may be prepared to employ a cost consultant directly to collaborate with the planning team to assess the financial impacts of the conceptual design plan.

2.6 Supplemental RFP Material

All relative reports and any supplemental reference material relevant to the RFP period (including future addenda, if any) are available to all short listed respondents and their *Design Teams* online at:

www.uleth.ca/pln/RFP-S2011-2319.htm

2.7 Existing Campus Plan

The Campus Master Plan shall consider the current *Core Campus Expansion Plan (2001)* and other previous reports and studies. The consulting team may suggest changes to recommendations contained in these studies, provided the consultant justifies the reasons for suggesting such alterations.

2.8 Planning Liaisons

Recognize the need for involvement and liaison with University Deans, Executive Directors, key staff, alumni and the City of Lethbridge and city community. This is an important element of the process of developing an encompassing plan.

2.9 Approvals

The scope of the outlined planning work is subject to evaluation requirements. Items outlined above will be selected and prioritized by the *University Campus Plan Steering Committee* (UCPSC) to proceed from the Design Development phase to the preparation of the draft plan phase and will make recommendations to Senior Administration of the University who will give approval to proceed and

incorporate all or part of this work into a single plan for completion.

2.10 Environmental Sustainability

As economic, social and environmental sustainability issues have become increasingly important over the last decade, the University has shown increased commitment to improving the institutions environmental impacts across widely accepted sustainable design methodologies and building practices.

A key direction of current the *Strategic Plan* includes the enhancement of the environmental sustainability of the University. Our recent focus in Facilities has been with environmental stewardship issues pertaining to reducing the consumption of non-renewable energy and water on campus.

2.11 Relevant Studies & Reports

The following is a list of relevant planning studies and planned or ongoing project information which are either available now on the website noted under section 2.6 or will be made available to the successful planning team:

Aperture Residential Park - Phase 3

Schematic Design report for the development of a new medium rise student residence building and adjacent dining facility which is scheduled to be constructed by April, 2013.

Dialog

Forthcoming in May, 2011

New Quadrangle Development Plan

Schematic Design report for the development of a new quadrangle public space north of Markin Hall and east of Anderson Hall.

IBI / Landplan

Forthcoming in May, 2011

E Lot Parking Redevelopment

Major parking areas immediately west of the core campus are currently being redeveloped. Presently in schematic design, the project plans to incorporate improved pedestrian networks and accessibility, improve surface water management and incorporate wind mitigation strategies.

ISL Engineering

Forthcoming in May-June, 2011

University of Lethbridge 2011-2015 Capital Plan

The University of Lethbridge updates its Capital Plan on an annual basis. The 2011-2015 Capital Plan forms the University's request to Government for funding of priority capital projects over the next ten years.

University of Lethbridge

March 17, 2011

Campus Space Report: Accommodating Growth to 2018

An academic and administrative space identification report which identifies the types and amounts of space required to accommodate expected growth over a period of ten years from 2008 to 2018 as well as identifies immediate renovation needs in the short term of 2011.

D. Spencer Court – Campus Planning

Associate Director, Planning & Capital Projects

University of Lethbridge

September 17, 2010

2010 Design Standards

Since 2008, Planning & Capital Projects has been organizing a coordinated preliminary design standards 'living' document for Capital Projects and Utilities.

John Claassen, Planning & Capital Projects

June, 2010

U of L Quadrangle Conceptual Design Report

AECOM was commissioned by the University to prepare a comprehensive stormwater management strategy for the central/

north area of campus, including the planned Quadrangle area immediately north of Markin Hall.

AECOM

June, 2010

UH Level 6 Parking Redevelopment

Early design plans contain proposed changes to the immediate north parking loop area of University Hall.

IBI / Landplan

2010

Pedestrian Wind Assessment Report

RWDI was retained by the University of Lethbridge to conduct a Pedestrian Wind Assessment on pedestrian areas around the proposed Markin Hall building. This assessment also covered existing pedestrian areas around Anderson Hall, the 1st Choice Saving Centre, Turcotte Hall and related west parking lots. The objective of this qualitative analysis was to estimate the pedestrian wind conditions on and around the identified areas.

RWDI

May, 2009

University of Lethbridge 2009-2013 Strategic Plan

A University strategic direction plan which serves to confirm our place as a comprehensive destination university, enhance the student experience, build community, promote access and enhance environmental sustainability.

www.uleth.ca/strategicplan

University of Lethbridge - "U are the Plan"

2009

Organization of Residence Students (ORS) Strategic Plan 2008-2011

The ORS strives to ensure that the University of Lethbridge is a great place to live by ensuring that every student in residence has access to the social support they need in order to achieve academic success in a safe environment that fosters the pursuit of personal and academic growth.

Stephen Brodrick, President, ORS

January, 2008

Exploration Place Site Grading, Cut & Fill Plans

The University of Lethbridge retained Westhoff Engineering Resources, Inc. to undertake a grading design study for Exploration Place. The grading design was to demonstrate an earth balancing for material from external and on-site excavations associated with future buildings. The assignment also included innovative approaches to stormwater management and to prepare preliminary servicing designs for sanitary, water distribution and shallow utilities.

Westhoff Engineering Resources Inc.

May, 2006

Exploration Place Design Basis Memorandum

Paired with above site grading, cut & fill plan document.

Westhoff Engineering Resources Inc.

May, 2005

Housing Services Strategic Plan 2005-2008

Housing Services strives to deliver excellence in quality services and support systems in Campus Housing to foster a living and learning environment for a diverse student population and to assist the University in becoming the institution of choice.

Heather Mirau, Hospitality Services

September, 2005

Core Campus Expansion Plan

An academic and administrative space identification report which identifies the types and amounts of space required to accommodate expected growth over a period of five years.

Brook McIlroy Planning + Urban Design

Cochrane Engineering

CivilTec Consulting

ND Lea

November, 2001

The additional relevant planning studies and reports below were made available to the planning consultant in preparation for the 2001 *Core Campus Expansion Plan*.

Traffic and Access Study

A multi-year circulation master plan for vehicular, bicycle and pedestrian circulation to and within the campus, recognizing that new facilities will be concentrated on the western portion of the campus.

NDLEA Engineers and Planners Inc.

Richard S. Tebinka, Project Manager

March, 2001

Campus Parking and Access Study

Reid Crowther & Partners

January, 2000

Utility Expansion Electrical High Voltage Distribution

Magna IV Engineering

Ameen Allidina, Project Manager

2000

Site Services Proposed New Building

Reid Crowther Partners Ltd. (EarthTech)

Jim Inch, Senior Project Engineer

November, 2000

Hot and Chilled Water Expansion Capacity

Wiebe Forest Engineering Ltd.

Marc Kadziolka, Mechanical Partner

The University of Lethbridge Campus Development Plan Review

John Andrews International Pty. Limited.

December, 1993

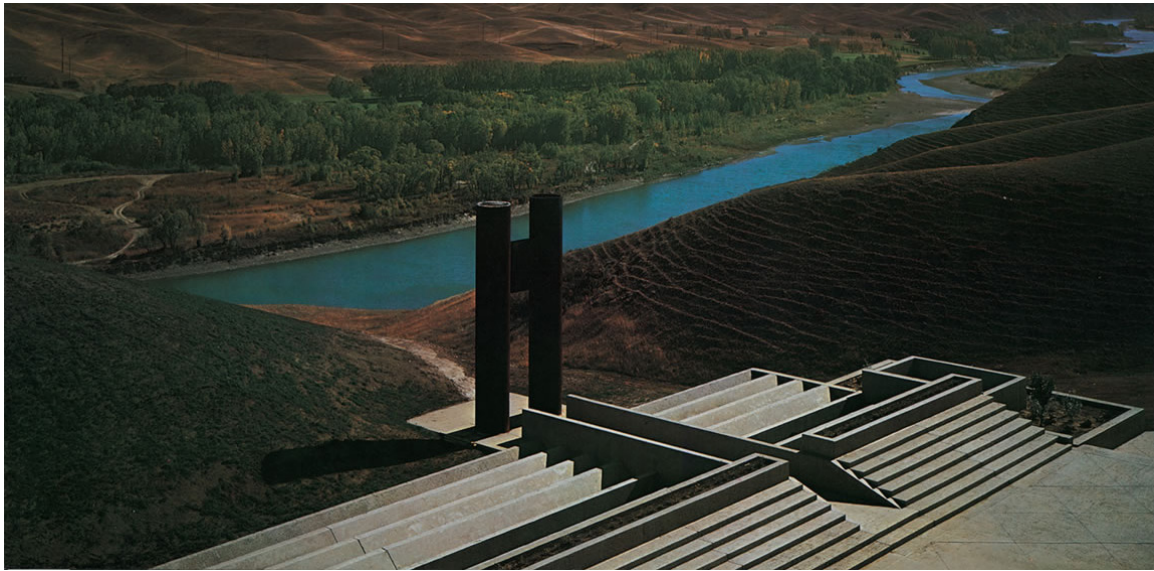
Landscape Analysis & Development Guidelines University of Lethbridge

The original landscape analysis and development guidelines for the new main campus in 1969.

Erickson / Massey Architects & Planners

Man Taylor Muret Ltd.

May, 1969



Original east patio of University Hall, 1971.

Development Plan – University of Lethbridge

The original Master Plan of the new main campus.

Erickson / Massey Architects & Planners

March, 1969

- Establish campus collegiums, places of belonging for students that enhance their connection to the University community
- Develop a First Nations Metis Inuit (FNMI) social/cultural space
- Establish an on-campus day care operation (completed in 2010)

2.12 Strategic Plan Synergies

The *University Strategic Plan 2009–2013* identifies key directions which should be acknowledged through aspects which enhance the Campus Master Plan. Some of the actions identified under each principle strategic direction that impact the development of our physical campus spaces include:

Confirm our Place as a Comprehensive University

- Expand our facilities to enhance our teaching and research
- Develop a new academic building that includes lab and classroom space

Enhance the Student Experience

- Increase student residence space on campus

Build Internal Community and Enhance Relationships with External Communities

- Build more social spaces on campus
- Develop arts facilities, including an art gallery, and academic space for the arts

Promote Access to Quality Post-Secondary Education

- Enhance and develop new student housing accommodation and commons facilities
- Improve the overall quality of the student post-secondary experience

Enhance the Environmental Sustainability of the University

- Develop an overall UofL sustainability strategy
- Continue to construct environmentally sustainable buildings using LEED as a guide in developing new and renovating existing facilities

- Develop a strategy to decrease the number of vehicles driven to campus

2.13 Key Development Concerns

Over the years, in tandem with the successful implementation of campus planning initiatives, critical consideration of our campus development has highlighted several areas of attention which have prompted the revisitation or reassessment of some aspects of the Core Campus Expansion Plan.

Nearly all respondents in the first SOQ stage expressed a similar consensus of planning criticism that we hope to pay strict attention to as we continue in this process.

Some of our general areas of concern include:

- ◆ Subsequent campus development in practice has caused a departure or dilution of many valuable tenets of the original 1969 campus plan vision. Principally, there is a growing sense of loss or connection to our prairie landscape and integration with the river ecology, which in the past has been a primary determinant of form and sense of place. This edge of campus remains to be a principal vantage point to the city across the valley.
- ◆ This sense of loss is amplified by trends of suburbanization that permeate the campus fabric and thus facilitate less desirable attributes of low density development, reliance on commuting ideologies and widespread disconnection of campus precincts. This is done at the expense of altering our dramatic setting and weakening our sense of community and integration.
- ◆ Our prairie and coulee geography is a valuable asset which sets our campus apart and makes



East coulee of University Hall in springtime.

the University campus physically unique. An improved focus on the landscape in terms of its preservation and subsequent building and development would allow unique place making opportunities to continue to flourish and further enhance our principal unique contextual campus amenity and brand or image.

- ◆ The intersection of the developing (sub) urban west side and the natural landscape has not sufficiently been addressed or acknowledged from a planning standpoint along the boundary of University Drive and into campus. Our property lies at the crux of this intersection and exchange.
- ◆ While efforts are currently underway to begin a number of phased improvements, the campus is dominated by hard surface parking areas, sometimes improperly located, without measures which mitigate their visual impacts, address climatic or environmental constraints, properly manage surface run-off or enhance the pedestrian experience to make our institution a more livable, safe and walkable campus.
- ◆ Parking demand management strategies could better correlate with the facilitation and encouragement of various alternative modes of transportation could be investigated further.
- ◆ There is a cross campus lack of connectivity in terms of outdoor spaces which should have a purposeful integration of accessible pedestrian networks. These may include natural paths and bicycle routes across campus precincts.
- ◆ Limitations of accessibility for disabled or persons with mobility issues could be examined further in connection with a forward thinking and committed sustainability plan for parking, transit, bicycle and vehicular networks.
- ◆ Primary and secondary campus entrances along University Drive lack presence, annunciation, identity and iconic value. Campus entrance signage at these gateways is outdated and not integrated into a cohesive entrance scheme.
- ◆ Way finding systems are only adequately supported in outdoor spaces which are largely undeveloped and do not promote engagement.
- ◆ The visual appearance and siting of buildings and public outdoor spaces could be further enhanced by a consistent integration with our topographical landscape.
- ◆ On the exterior, some recent buildings appear foreign and disparate from one to another contributing to a less cohesive character which departs from earlier legacy sensibilities.
- ◆ Careful consideration of the top of bank development line should be reconsidered in the overall planning effort for potential appropriate sites which make long term sense to reconsider in core areas.
- ◆ Compared to competing institutions, only in recent years has the university campus benefitted from catalytic projects to attract students and spotlight the University at consistent intervals. As with the resulting effect of the inaugural hall in 1971, strategic iconic buildings could significantly enhance our campus as a destination university, build development momentum and transform campus in a rigorous way.
- ◆ Design guidelines in the 2001 report are limited and somewhat generic. They require greater detail to influence and assist architects and designers in the design and planning of future buildings and landscapes in a cohesive manner and in accordance with a governing vision of 'Spirit of Place' and campus life.
- ◆ Previous implementation of the master plan has lacked a mechanism with enough force to maintain the master plan. While some flexibility should be permitted, a recommendation to

institute both *Master Plan* and/or *Design Review Committees* (separate from project steering committees) could be implemented to advocate for the master plan and give force to subsequent design guidelines for projects. Senior Administration `buy-in` is crucial for any successful master plan effort.

- ◆ A new master plan could reveal a development plan in phases of intervals spanning twenty-five years.
- ◆ Development densities are generally low and sprawling in expanding areas producing disconnectivity from the core academic campus, poor walkability and less efficient use of valuable land resources.
- ◆ Several core campus buildings were not designed as `durable buildings` with at least a 50 to 100 year design life. The benefits of an better performing `envelope first` design methodology are widely proven to add better value using performance metrics and life-cycle cost analysis in the context of long term sustainability. The added value of passive architectural components that comprise the building enclosure and `skin` should not be undermined in the review of established design guidelines.
- ◆ While energy use is a significant component of environmental sustainability, our institution`s view of sustainability should relate to the triple bottom line that respects environmental, social and economic balance in sustainability endeavors.
- ◆ Initiatives aimed at forward thinking goals of net-zero energy buildings and true carbon neutrality are now entering the parlance of policy and mandatory requirements across jurisdictions in North America. Many institutions, companies and organizations have widely referenced and accepted the more stringent energy consumption goals entailed within new energy codes or the 2030 Challenge which require new buildings and major renovations to meet a fossil fuel, GHG-emission and energy performance standard of 60% of the regional average for that building type, with staged reductions to 70% by 2015, 80% by 2020, 90% by 2025 and total carbon neutrality by the year 2030. Our institution needs to discuss this in light of our goals.
- ◆ Greater emphasis could be placed on the capacity of architecture and environmental design to influence sustainable building design with increased potency. This mind set has the potential to greatly reduce energy demands and the complexity of `active` mechanical heating and ventilation and air conditioning systems which typically have high consumption and component replacement costs.
- ◆ ...



1



2



3



4

1 Early Conceptual Model of University Hall (1968)

2 Original West Entrance and Patio

3 University Hall building at Night (mid-1970s)

4 Arthur Erickson (1970)

3 Definitions

“Prime Consultant” or “Architect” is the person, firm or entity identified as such in the Request For Proposal (including all documents herein) whom the Owner has selected to perform certain Work.

The term “Planning Team”, “Design Team” or “Consultant Team” refers to the Prime Consultant(s) authorized representative(s) or sub-consultants.

“Bidder” or “proponent” is the individual, company, organization or other interested party that submits, or intends to submit, a proposal in response to this Request For Proposal (RFP).

“Contract” means the Agreement between Owner and Prime Consultant/Prime Consultant to provide the Services in accordance with the Contract Documents herein.

“Contract Documents” means all drawings, specifications, samples, models, terms and conditions, exhibits, schedules, addenda, amendments, instructions and requirements stated within this RFP and other related documents approved by the Owner.

“Contractor” is the person or entity that will perform subsequent Work which may be developed from the Consultant’s Work (Consultants Work is described in Section 3.0: Scope of Services). The Owner shall approve the selection of any Contractor or Sub-Contractor (including the Cost Consultant, if any is stipulated).

“Owner” or “Client” means the legal entity as specified herein, i.e. The University of Lethbridge, and may also be referred to as the University or U of L.

“Proposal” or “Submission” or “bid” is a response provided by the bidder to the RFP.

“RFP” (Request For Proposal) is a request by the Owner for proposals in response to the documents contained herein.

“Remedial Work” means such Work, as the Consultant may be required to provide to correct deficiencies or defects in the Work.

“Scope of Services” includes but is not limited to, the requirements and instructions detailed within the RFP.

“Sub-Consultant” is the person or persons, firm or company contracted by the Prime Consultant, with the approval of the Owner, to perform a portion of the Work.

“U of L” is the Owner and may also be referred to as: The University of Lethbridge, The University, University, The U of L.

“Work” means the performance of all Work and the provision of all Services, Supervision, equipment, documents and materials necessary for the successful and safe completion of Work described in the Scope of Services.

“Documents” shall include, but not be limited to, the electronic and non-electronic form of designs, plans, drawings, specifications, notes, calculations, and other related information created or revised for the purpose of this Work.

"Reduced to elementals – the sky as space, the earth as form, every aspect of these becomes poignantly clear. The pattern of clouds, of plowed fields or river coulees, each vividly conveys a meaning. Colour is the sky under storm, wheat stubble in the snow, a newly turned earth. Each set of colours unveils meaning. Thus, to maintain harmony with the land, one must submit to its rules. One must use space generously or not at all. Buildings must grow out of the ground, clustered with other buildings or trees, but never sit blatantly on top of the ground. Forms must be simple and geometrically concise, as elaborate forms and fussy detail show as weakness. As the geometry of the section measures out the landscape, one must work with an equally clear geometry or appear indecisive. Just as the prairie landscape has been reduced to essentials, so must its buildings be elemental."

Erickson/Massey - Development Plan, University of Lethbridge (March 7, 1969)

4

Scope of Services

The University of Lethbridge will select an urban planning or architectural consultant to be Prime Consultant, together with sub consultants relevant to the project, herein after referred to as the *Planning/Design Team*. This team will provide the full scope of professional services as earlier described including the total conceptual design, documentation and final presentation of the project. The successful team shall be comprised of experienced personnel that have the capability, time and resources at their disposal to complete this project on time and within the University's allowable budget.

4.1 General Requirements:

4.1.1

Provide the services of planning and development services, documentation and presentation services across the prescribed phases of the project.

4.1.2

Consult with the Owner during the implementation stage to confirm the requirements of work with respect to the intent, planning needs, time schedules, and compliance with existing planning frameworks. The consultant will conceptually enhance the design of our main campus in consultation with, and subject to the approval of the *University Campus Plan Steering Committee* (UCPSC), which may include representatives from Senior Administration, various Facilities' staff, faculty or administrative staff by invitation.

4.1.3.

Submit a critical path schedule for the project design services for approval by the Owner within 14 days after the award of the commission and prior to signing an agreement or contract and following the initial start-up meeting.

4.1.4.

Prepare sketches, drawings, 3-D representations in digital or physical media and specification guidelines to appropriately communicate planning information during the various stages of the Work and provide the same to the Owner as the drawings and specifications for each contemplated stage. This work may also be compiled in the form of presentation boards to communicate information at open houses or public forums.

4.1.5.

Provide a final Campus Master Plan report in *portable document format* (.pdf) along with all media files that constitute the report, including drawing files delivered in fully compatible AutoCAD™ electronic media files (.dwg format), and all related image files. Approximately twenty (20) physical copies of the final report should also be provided at the end of the project.

4.1.6.

The successful team will need to propose and implement a *Project Document Management System* (PDMS) to disseminate information and related

materials to the University for the duration of the project. This may include access to a Consultant's Microsoft Office Sharepoint Server or FTP site to share drawing information, etc.

4.1.7.

The Title (Ownership) to the Work, prepared by the Consultant(s), belongs to the University and shall be in the name of the University of Lethbridge and the University reserves the right to take title at anytime. The copyright to the conceptual design shall remain the consultant's intellectual property.

4.1.8.

The *Prime Consultant* will be required to enter into an agreement with The University of Lethbridge. A draft version of the contract agreement is located in Appendix A.

4.1.9.

The *Prime Consultant* will assign a team project manager to prepare and maintain a register or

matrix of all risks that could impact the project schedule and/or budget during any or all phases of the project. Include any action or strategy that is required to mitigate each risk, assigning contingencies of time, as necessary.

It is the intent of the University to effectively manage all risks through good planning and coordination or by assigning time or monetary contingencies to each risk, as necessary.

4.2 Phases I-III: Implementation, (re)Discovery, The Future (Pre-Design & Schematic Design)

While some of the specific activities of these phases will be finalized during the implementation stage, the following subsections highlight the anticipated scope of work and responsibilities of the project.



View of pedestrian access along the University Library and University Centre for the Arts toward University Hall.

4.2.1.

Prepare a *Work Plan* process, schedule and list of deliverables for the Owner's consideration and finalization that acknowledges the academic school year and availability of key input resources. The process, schedule and expected deliverables will become part of the agreement and shall be adhered to by the *Prime Consultant*.

4.2.2.

Consult with the *University Campus Plan Steering Committee* (UCPSC), other Facilities staff and relevant user group members to confirm other project requirements.

4.2.3.

In conjunction with the University, facilitate an integrated stakeholder consultation process, visioning meetings, workshop charettes and open house events as necessary. Consult with the stakeholders to ensure all programming issues and concerns are addressed. Chair all stakeholder visioning, conceptual design and program meetings. Additional meetings may include groups from the adjacent community neighbourhoods.

4.2.4.

As applicable, visit and examine the campus site and take into consideration the existing context and conditions, such as topography, landscape, climate, building form and design, material constitution, pedestrian, parking and road networks.

4.2.5.

Review all supporting documentation and background information provided for reference to the *Design Team* noted in this RFP. Several additional documents are likely to come forward during the planning process as well.

4.2.6.

Become familiar with applicable safety and building

codes, regulations and restrictions of any authority having jurisdiction and other factors affecting the conceptual design of the master plan project.

4.2.7.

Review, in conjunction with University of Lethbridge staff, the existing campus infrastructure in the development area to determine the locations, capacities and potential expansion of the existing infrastructure.

4.2.8.

Outline the measures that will be taken to ensure ease of implementation of the plan in a legible manner through compelling graphics and illustration that clearly convey 'future-proof' planning concepts.

4.2.9.

Assist in providing material to launch the University Campus Master Plan website which will serve as a virtual promotion and feedback mechanism in connection with an analytical research tool being contemplated for useful integration to the project via the Information Technology web development team at the University.

4.2.10.

Assist the University in enabling a physical presence by way of a publicly accessible information centre located where planning information can be provided for review and comment to the campus community.

4.2.11.

Review the current Capital Plan and reported campus space needs and predicted growth in order to appropriately confirm and be informed by the likely scale of future buildings.

4.2.12.

Develop a table of contents or checklist to document key consensus items that guide the project forward toward a meaningful deliverable.

4.3 Phases IV: Conceptual Alternatives (Design Development)

4.3.1.

Develop three (3) conceptual alternatives to examine the short and long term options for campus development based on earlier assessments, consultation, feedback and guidance from input committees.

4.3.2.

Utilize the table of contents or checklist developed from the guiding principles of the project to verify the preferred criteria to address in each alternative concept.

4.3.3.

Alternative concepts are to consist of drawings, narratives and other documents appropriate to the scale of this project, to fix and describe the size, character and phasing of the master plan in its myriad of integrated frameworks appropriate to describe the intent of the project.

4.3.4.

A comparative assessment of the alternatives will be presented by the *Prime Consultant* at an open house for informed consideration by the UCPSC and stakeholder groups for review and feedback.

4.4 Phase V: Draft Campus Plan (Documentation & Draft Report)

4.4.1.

Prepare a detailed draft Campus Master Plan narrative report with related policies and guideline documents which support the frameworks for all aspects of the campus master plan which will be reviewed by the University of Lethbridge.

4.4.2.

The draft plan should be based on the preferred alternative plan developed from the previous phase. The draft Campus Master Plan will be presented for review to the UCPSC and others as appropriate.

4.4.3.

The University will require twenty (25) printed copies of the draft University Campus Master Plan narrative report in order to make final decisions across the steering and input committees and to finalize the report for the adoption phase.

4.4.3.

The final plan will be based upon feedback on the draft plan.

4.5 Phase VI: Adopt the UCMP (Presentation of Final Plan)

4.5.1.

The *Prime Consultant* and *Planning/Design Team* shall prepare final documentation and material for a presentation of the University Campus Master Plan (UCMP) to the Board of Governors. This material may include presentation panels and digital media based presentation. Budget permitting, it may include an appropriately scaled physical model.

4.5.2.

During the presentation, the *Prime Consultant* shall be a representative of the University.

4.5.3.

The University will require twenty (25) printed copies of the final University Campus Master Plan (UCMP) narrative report and all supporting digital documentation for our reference.

5

Project Organization

5.1 Project Organization Matrix

The proposed project organization for the University Campus Master Plan project is illustrated in the form of a matrix located in Appendix B.

5.2 Steering & Input Committees

The *University Campus Plan Steering Committee* (UCPSC) will be comprised of two distinct groups as follows:

1. The core UCPSC will be comprised of up to eight (8) primary representatives from University Senior Administration, Facilities and Planning and Capital Projects departments.
2. The *Planning Input Sub-Committee* (PIsC) will be comprised of several other individuals, such as Deans, key academic, research and support staff, students and a select few other campus representatives. Others may be invited to attend workshops or planning sessions in order to provide specific expertise or input on a limited basis only.

Please refer to Appendix B for a detailed list of proposed committee members and their communication relationships to the project manager and *Prime Consultant* team.

5.3 Assigned Project Manager

The Planning & Capital Projects department of Facilities has assigned the following individual to act on behalf of the University of Lethbridge as the Project Manager and facilitator of this project:

D. Spencer Court Architect AAA MAA
MRAIC SCUP LEED® AP (BD+C)

Campus Planner
Associate Director - Planning & Capital Projects
University of Lethbridge - Facilities
t. 403.329.2508 e. spencer.court@uleth.ca

5.4 Planning Design Team

The *Prime Consultant* shall propose their team of sub-consultants who will comprise the entire *Planning/Design Team* for the project.

5.5 Cost Consultant

As discussed earlier, the *Prime Consultant* will only be required to work with a *Cost Consultant* on this conceptual design project if it is deemed of value to the project, such as in a process to inform potential phasing plans and so forth.



View of coulee and Oldman River valley toward University Hall (Mid-1970s - photographer unknown).

6 Response Requirements

Without in any way limiting respondents' freedom or ability to respond, the *University Campus Plan Steering Committee* will verify the following minimum response requirements a proposal must clearly and succinctly communicate:

6.1 Methodology Outline

An outline of the methodology the *Prime Consultant* intends to employ in undertaking the commission, including the approach to planning, organizing and managing the project effort.

6.2 Comments on University Schedule

Comments on the University's schedules and timelines with a description of the capabilities and resources which the firm will make available to complete the work within the schedule.

6.3 Critical Path Schedule

A proposed Critical Path Schedule that is realistic and comprehensive that responds to the proposed project phasing.

6.4 Creative Capabilities

Information that will enable the University to assess

the *Design Team's* creative approach and general ability to provide comprehensive planning solutions. This must include a copy of a recent post-secondary or institutional Master Plan completed by your team which illustrates the planning deliverable that the University of Lethbridge can expect upon completion of the project.

6.5 Technical Capabilities

Information that will enable the University to assess the *Design Team's* technical production and organization abilities to ensure competent planning and design, necessary engineering, proper coordination, excellent drawings and reporting documents).

6.6 Planning Organizational Chart

A *Planning Organizational Chart* of the project that indicates communication flow and points of client contact. Be specific in indicating all team member's relationship to the *Prime Consultant* firm and their base office.

6.7 Participation of Principal(s)

A statement on the extent of direct leadership and participation of the firm's principal(s) in the project and who will actually take the lead as the team project architect, planner or manager.

6.8 Prime Consultant Relationship

An explanation of how the *Prime Consultant* proposes to handle the relationship with any associated consultants or consultant firms chosen to be a part of the design team and how you will manage your work with offices and resources not located in Lethbridge.

6.9 Joint Ventures

Where the proposal is submitted by a joint venture partnership, an explanation of:

1. How the Joint Venture will be structured, and how it is proposed to proportion and support the risk and responsibilities by the individual companies.
2. Why this partnership was selected, and what advantages the University can expect from the partnership.
3. How the work will be shared between the offices and relate to the nominated personnel for each of the phases/functions.

6.10 Sub-Consultant Teams

Identify firms, individuals and/or sub consultants, included on the *Design Team*, primary in-house production staff and administration personnel. Indicate on the attached forms (Schedules A-1, A-2 ...) the roles and responsibilities for each discipline and each team member for all phases of the project, i.e. if there is a transition in personnel among phases. Indicate the experience and track record of each in comparable projects and the extent of your prior working relationship with the respective firms.

6.11 Relevant Projects

Include brief project profiles for relevant or similar conceptual planning projects completed within the last five (5) years, to include the size, type, and cost of the project and also the specific role played by the firm.

6.12 References

A list of at least three (3) references complete with the names of key client decision makers on projects of similar nature and magnitude for which the *Prime Consultant* and/or associates have provided prime design and production services. References must include contact name and current address, phone number, and email address.

6.13 Required Start-up Information

A list and description of the data and information required from the University at the outset of the work to enable effective commencement of the work.

6.14 Other Comments

Any other comments, innovations or information relevant to the University Campus Master Plan project.

6.15 Professional Liability Insurance

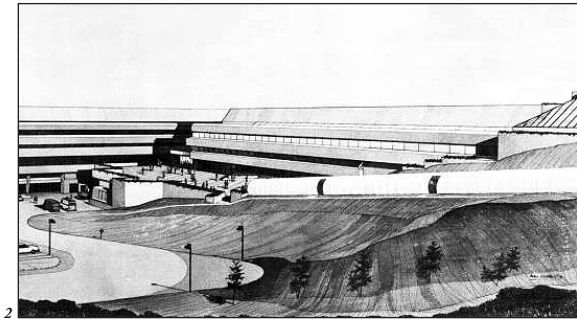
Verification of the firm's professional liability insurance coverage.

6.16 Schedule C: Proposal Form

Completion of proposal Schedule C with break-down of the proposed method of compensation and a total cost for the services provided, including an estimate for disbursements, as requested.



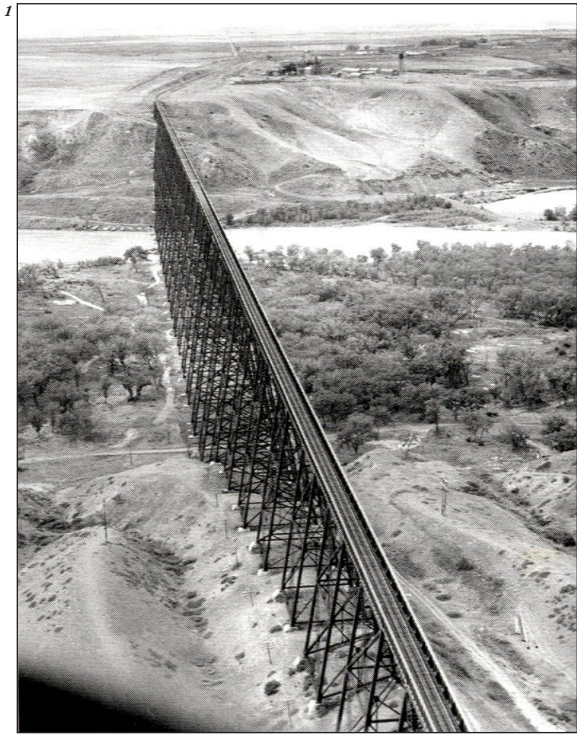
Aerial View, University of Lethbridge Main Campus (2001)



2



3



1 Aerial View of High Level Train Bridge, North of Campus on the Old Man River
2 University Centre for the Arts (Architect's Concept Sketch - 1981)
3 Royal Architectural Institute of Canada Commemorative Stamp, University Hall (1 of 4 Canadian architectural works selected by the RAIC/Canada Post).

7 General Conditions & Instructions

All prospective bidders are urged to conduct their own investigations. The University of Lethbridge shall not be held liable or accountable for any error or omission in any part of this RFP.

A site tour can be arranged, if deemed necessary, by contacting the assigned project manager.

7.1 Right to Reject Submission

The University of Lethbridge reserves the right to reject any submission, which in its opinion are clearly non-viable from an implementation, operational, environmental, scheduling, technological or financial point of view.

7.2 Cancellation of RFP

The University of Lethbridge may, at its discretion, cancel or postpone this RFP, or any contract that could arise from this RFP, as a result of receiving a single response/submission.

7.3 Revisions to RFP

Any revisions, notice of errata or changes to this RFP will be issued to all short listed firms no later than three (3) days prior to the *Closing Date*.

7.4 Terms & Conditions

The short-listed firms shall agree that the terms and conditions and all documents forming this RFP constitute and govern the entire agreement, for the Work herein, between bidder and the University of Lethbridge superseding, terminating and otherwise rendering null and void any and all prior agreements, understandings, negotiations, contracts, whether written or oral between the Bidder and the University of Lethbridge.

7.5 Right to Negotiate

The University of Lethbridge reserves the right to negotiate any contract final terms and conditions with a single bidder without reference to other bidders or submissions.

7.6 Property of Documentation

All documents submitted to the University of Lethbridge as a result of this RFP become the property of the University of Lethbridge and as such, shall be subject to the disclosure provisions of the Freedom of Information and Protection of Privacy Act of Alberta. Making the entire submission proprietary or confidential shall be neither accepted nor honored. Bidders shall identify which portion(s) of their submission is confidential and what harm could reason-

ably be expected from disclosure of those portions.

7.7 Reserved Rights

The University of Lethbridge reserves the right to require further information, interview short-listed teams, reject any or all proposals, and to waive irregularities and formalities at its discretion.

7.8 Changes by Bidders to Proposals

Bidders shall not change or amend their Proposal in any way after the closing date unless requested by the University of Lethbridge for the purpose of clarification.

7.9 Incomplete Submissions

Submissions that are unsigned, incomplete, improperly executed, illegible, obscure conditional, or that alter this RFP, contain significant errors, or in any way fail to conform to the requirements of the RFP document will likely be rejected.

7.10 Submission Location & Deadline

The *Prime Consultant* is required to submit **five (5) hard copies** of the proposal response before the deadline and clearly mark the envelope “**RFP–S2011-2319**” delivered in person or by mail in a sealed envelope to:

Mr. Daryl Schacher
Manager, Materials Management
The University of Lethbridge
4401 University Drive
Lethbridge, AB., T1K 3M4

7.11 Questions

Direct all technical and commercial questions regarding this Request for Proposals document during the response period to:

Technical:
Spencer Court 403-329-2508
e. spencer.court@uleth.ca

Commercial:
Daryl Schacher 403-329-2415
e. daryl.schacher@uleth.ca

8

Consultant Selection Process

8.1 Selection Process

The following process will be followed for the selection of the Prime Consultant:

8.1.1.

Proposals will be evaluated on the basis of the Prime Consultant group's proposal. The University reserves the right to short list and select the Prime Consultant by means of requesting follow-up documentation or a presentation to the Facilities Steering Committee during the selection period.

8.1.3.

Teams seriously being considered by the Selection Committee may require an interview process which will include a presentation in the Facilities offices at the University of Lethbridge.

8.1.2.

Once the selection is ratified by the Facilities Steering Committee, contract negotiations will be conducted with the selected Prime Consultant.

8.2 Consultant Team

The Consulting Team will be selected based on submissions that reflect:

8.2.1.

A demonstrated understanding of the overall re-

quirements of the project.

8.2.2.

An evaluation of the Prime Consultant's and proposed Design Team's ability to successfully execute the project.

8.2.3.

Team members' specific experience in projects of this typology and scope and proposed time commitment of each individual to the project.

8.2.4.

The ability of the Design Team to effectively communicate and interface with the University through the proposal submission.

8.2.5.

Experience in leading projects of a similar type and scope to successful completion on time and within budget.

8.2.6.

Previous experience of the Design Team in implementing proven sustainable design strategies and practices.

8.2.7.

Fees in relation to appropriate guidelines instituted for professional fees for projects of similar type and scope.

CONSULTING SERVICES AGREEMENT

UofL Project No. 801089

THIS AGREEMENT made as of the ____ day of _____, 2011

BETWEEN:

**THE GOVERNORS
OF THE UNIVERSITY OF LETHBRIDGE**4401 University Drive
LETHBRIDGE, Alberta
T1K 3M4

(hereinafter referred to as the “Client” or “Owner”)

OF THE FIRST PART

- and -

PRIME CONSULTANT[Address]
[City, Province]
[Postal Code]

(hereinafter referred to as the “Prime Consultant”)

OF THE SECOND PART

WHEREAS the Client intends to acquire conceptual design, documentation, and presentation services to enhance the University Campus Master Plan at the main campus of the University of Lethbridge (hereinafter called the “Campus Plan” or “Campus Master Plan”);

AND WHEREAS the Prime Consultant has agreed to provide certain services with respect to the preparation of reports, drawings, specifications and other documents required for the conceptual design of and preparation for the implementation of the Campus Master Plan;

NOW THEREFORE this Agreement witnesseth as follows:

Definitions:

“Bidder” or “proponent” is the individual, company, organization or other interested party that submits, or intends to submit, a proposal in response to this Request For Proposal (RFP).

“Contract” means the Agreement between Owner and Consultant to provide the Services in accordance with the Contract Documents herein.

“Contract Documents” means all drawings, specifications, samples, models, terms and conditions, exhibits, schedules, addenda, amendments, instructions and requirements stated within this RFP and other related documents approved by the Owner.

“Prime Consultant” or “Design Team” is the person or entity identified as such in the Request For Proposal (including all Schedules herein) who the Owner has selected to perform certain Work. The term Consultant means the Prime Consultant or the Consultant’s authorized representative.

“Equipment” means the equipment and tools required to perform Services.

“Owner” or “Client” means the legal entity as specified herein, i.e. The University of Lethbridge, and may also be referred to as “the University” or “the U of L”.

”Proposal” or “Submission” or “Bid” is a response provided by the bidder to the RFP.

“RFP” (Request For Proposal) is a request by the Owner for proposals in response to the documents contained herein.

“Remedial Work” means such Work that the Consultant may be required to provide to correct deficiencies or defects in the Work.

“Scope of Work” includes but is not limited to, the requirements and instructions detailed within the RFP.

“Sub-Consultant” is the person or persons, firm or company contracted by the Consultant, with the approval of the Owner, to perform a portion of the Scope of Work.

“Work” means the performance of all work and the provision of all services, supervision, equipment, documents and materials necessary for the successful and safe completion of the Scope of Work.

“Documents” shall include, but not be limited to, the electronic and non-electronic form of designs, plans, drawings, specifications, notes, calculations, and other related information created or revised for the purpose of this work.

Terms of the Agreement:

.1 Assignment

Neither party shall assign or subcontract the whole or any part of its obligations without the written consent of the other.

.2 Changes to Scope of Work

The Owner must approve any and all changes to the Scope of Work in writing.

.3 Governing Law

This contract shall be governed by and construed in accordance with the laws of the Province of Alberta.

.4 Termination

The Owner may, without prejudice to any other right or remedy it might have, suspend or terminate this agreement for any reason whatsoever, effective immediately. In the event of termination the Owner shall be relieved of all further obligations with respect to the Work terminated except the obligation to pay the Consultant for the cost of the Work incurred up to the effective date of termination.

In no event shall the Owner be liable to the Consultant for any loss of anticipated profits as a result of suspension or termination of the Work.

Upon the date of termination, the Consultant shall immediately deliver to the Owner copies of all electronic and non-electronic documents, including without limitation drawings, specifications, calculations, notes and computer data, other than the Consultant's proprietary programs, relating to the Work terminated. All such documents shall be the exclusive property of the Owner for the use of the Owner as it chooses, including completion of the Work by itself or other Consultants.

.5 Ownership of Work

The Consultant shall give the Owner unrestricted access to all documents of electronic and non-electronic form related to the performance of the Work, including, without limitation, designs, plans, drawings and specifications during the course of their preparation, and upon completion shall promptly submit all documents to the Owner for written approval.

The Title (Ownership) to the Work prepared by the Consultant shall be in the name of the Owner and the Owner reserves the right to take title at any time.

All "documents" (see definitions) shall be the exclusive property of the Owner and may be used by any contractor, or Owner agent, selected by the Owner. The Consultant may retain a copy of the documents, but may not, without the Owner's express written consent, disclose their content to any third party or use for any purpose other than as directed by the Owner.

The Consultant shall be responsible for all materials and supplies furnished by it or delivered to it by the

Owner which are to be incorporated in the Work or used in the performance of the Work.

.6 Liabilities and Indemnity

The Consultant represents and warrants that it has the expertise and experience to expeditiously and efficiently perform all Services as set out herein in a good, proper and workmanlike manner.

The Consultant, to the fullest extent permitted by law and to the extent caused by the Consultant's negligent acts, errors or omissions in the performance of the professional services under this Agreement shall indemnify and pay on behalf of and hold harmless the University of Lethbridge, its officers, officials, agents, representatives, employees, and volunteers, from and against all claims, demands, losses, costs, damages, actions, suits, or proceedings arising out of or in connection with the activities or the performance of work by the consultant, his agents, representatives, employees or subcontractors. The consultant shall not be responsible for any damages for which the University is legally liable.

.7 Dispute Resolution

Either party may give notice at any time with respect to any dispute between the parties under this Agreement that the dispute shall be:

i) Firstly, referred to two representatives, one a representative of the Consultant, and the other a representative of the Owner, for negotiation and settlement. Failing final resolution of the matter within thirty (30) days from such reference

ii) The dispute shall be referred to a mediator mutually agreed upon by the parties for non-binding mediation. The costs of such mediation shall be borne equally by the parties. Such mediation shall be held within ninety (90) days of the end of negotiations pursuant to sub clause i)

iii) Failing final resolution of the matter by mediation, the parties may refer the matter to binding arbitration in accordance with the provisions of the Arbitration Act of the Province of Alberta. The place of arbitration shall be Lethbridge in the Province of Alberta. Such arbitration shall be by a single arbitrator who shall be agreed upon by the parties, failing which such single arbitrator shall be appointed pursuant to the provisions of the applicable Arbitration Act.

iv) Nothing contained herein shall be deemed to be a waiver or relinquishment of either party's rights or remedies through the litigation process, should the dispute not be resolved through any of the aforementioned resolution steps.

.8 Audit and Record Retention

The Consultant shall maintain, and shall require its Sub-consultants to maintain, in accordance with generally accepted accounting principles and practices satisfactory to the Owner, books, records and accounts pertaining to the performance of the Work, including the Consultant's and Sub-consultants' personnel records, correspondence, instructions, plans, drawings, receipts, vouchers, memoranda, tapes, data, models, data stored in computer libraries, and such other documentation and related systems of controls necessary

for an accurate audit and verification of costs of the Work and general contract compliance. The Consultant and Sub consultants shall preserve said documents and registers during performance of the Work and for a period of not less than two (2) years after termination or acceptance of the Work, whichever is later.

The Owner and/or its authorized representatives shall at all times have access to and be authorized to examine and make copies of all documents, records and systems of control set forth herein and such other documents and systems as may be related to the contract and shall be authorized to interview the Consultant and its Sub-consultants' personnel as may be necessary for an accurate audit and verification of costs of the Work and general contract compliance by the Consultant.

Notification of any claims made or discrepancies disclosed by such audit shall be made in writing to the Consultant. The Consultant and the Owner shall diligently attempt to resolve and agree upon such audit claims or discrepancies. Failing a resolution and agreement between the Owner and the Consultant within sixty (60) days of the claim being made known to the Consultant, the matter shall be arbitrated in accordance with section 3.6 "Dispute Resolution". Upon an audit claim or discrepancy being resolved and agreed upon or arbitrated, the Consultant shall forthwith reimburse the Owner for any monies due as a result of such agreement or determination. The Consultant or its Sub-consultants shall make no charge for such audit or for making such necessary adjustments.

The Consultant shall retain all records, data and information pertaining to the Work as may be required by regulatory authorities having jurisdiction.

.9 Access to the Work

The Owner shall have reasonable access to and the right to inspect all aspects of the Work at any time during the performance of the Work and shall have the right to participate in all meetings pertaining to the Work.

.10 Insurance Coverage

The Consultant shall obtain and maintain in force during the term of this agreement the following insurance with limits not less than those shown in connection with its performance of any portion of the Work, unless the Owner otherwise agrees in writing:

i) Worker's Compensation: Worker's Compensation Insurance in accordance with applicable provincial legislation and statutes.

ii) Employer's Liability Insurance: Employer's Liability Insurance with limits not less than One Million Dollars (\$1,000,000) for each occurrence for employees not covered by Worker's Compensation.

iii) Comprehensive General Liability Insurance: Providing for a combined single limit of Two Million Dollars (\$2,000,000) for each occurrence or accident and on an aggregate basis for products and completed operations.

Providing coverage for damages because of bodily injury (including death at any time resulting therefrom) and personal injury sustained by any person or persons or because of injury to or destruction of property (including loss of use or occupancy) arising out of any operations in connection with the Agreement subject to all exclusions set forth in the said policy.

Including coverage for contractual liability, tortuous liability, product liability, completed operations liability, occurrence basis property damage.

The policy shall extend to cover the employees of the Insured(s). The policy shall contain a clause providing that the inclusion of more than one Insured shall not in any way affect the rights of any Insured as respects any claim, demand, suit or judgment made against any other Insured, subject to an overall limit of Two Million Dollars (\$2,000,000).

iv) Automobile Liability Insurance: Automobile Liability insurance covering bodily injury (including passenger hazard) and property damage arising from the operation of owned, non-owned, rented or leased vehicles used in connection with the Work, with inclusive limits of not less than One Million Dollars (\$1,000,000) for any one accident.

v) Professional Liability Insurance: The Consultant, at the Consultant's expense, shall effect and continuously maintain Professional Liability insurance coverage from the commencement of performance of the Services for a minimum five (5) years after their completion. The policy shall be in an amount usual for the nature and scope of the Services but, unless specified elsewhere in the proposal documents, shall have a limit of liability of not less than \$1,000,000.00 per claim.

vi) Insurance Required by Law: Obtain and keep in force any other insurance, which the Consultant is required by law to provide.

The insurance obtained by the Consultant pursuant to this paragraph shall be provided in accordance with the following terms and conditions:

- a) Contemporaneously with the execution of the Agreement, the Consultant shall deposit with the Owner a Certificate of Insurance as evidence of the insurance required above in a form satisfactory to the Owner and with insurers acceptable to the Owner; and
- b) Each insurance policy shall provide that thirty (30) days prior written notice shall be given to the Owner of any cancellation of any such policy or policies, or any change material to the interest of the Owner.

The Consultant shall require, and shall be responsible for ensuring that all its Sub-consultants obtain and keep in force during their performance of any portion of the Work under the Agreement, insurance coverage equivalent to that required above. Upon request, the Consultant shall furnish to the Owner evidence satisfactory to the Owner of such insurance coverage. The Owner may reduce or waive all or any portion

of these insurance requirements for Sub-consultants under circumstances where the Work to be subcontracted does not require equivalent insurance coverage or where a Subcontractor cannot reasonably obtain such coverage. Such reduction or waiver shall be obtained in writing and shall in no way reduce or waive the Consultant's responsibility or liability for Work performed under subcontract.

Neither the provision of insurance by the Consultant in accordance with the requirements stated herein, nor the insolvency or bankruptcy of any insurance company, nor failure of any insurance company to pay any claim accruing, shall be held to waive any other provisions of the Agreement with respect to liability of the Consultant or otherwise.

.11 Warranties

The Consultant shall warrant each segment of the Work performed by The Consultant hereunder against defect and non-compliance with this Agreement for a period of twenty-four (24) months after completion of each segment. The Owner shall notify The Consultant of the discovery of any defect, in writing, and The Consultant shall promptly, upon receipt of such notification, perform, or have performed, Remedial Work to correct such defect to the satisfaction of the Owner. All costs incurred by The Consultant related to the performance of Remedial Work shall be to The Consultant's account. In the event that The Consultant does not promptly initiate action to perform such Remedial Work and to proceed thereafter to diligently complete such Remedial Work, the Owner may choose to correct such defect itself and The Consultant shall reimburse the Owner for the cost of such correction.

.12 Scope of Work

The Work to be performed shall be as set out in the Owner's Request for Qualifications RFQu-S2011-2319, dated March 10, 2011 and Request for Proposal RFP-S2011-2319 for *conceptual design services for the enhancement of the University Campus Master Plan* at the University of Lethbridge main campus, dated April 15, 2011, and the Consultant's proposal dated _____, 2011 unless otherwise noted herein.

.13 Fee

The pricing structure provided by the Consultant to the Owner, shall be a Fixed Fee of: \$ _____. GST not included plus disbursements to a maximum of \$ _____.

After the Contract has been executed in accordance with the Contract Documents, the University of Lethbridge will issue payment to the Consultant for the Work completed. Compensation for the Scope of Services and Schedule described in the Contract Documents herein will only be for a Fixed Fee.

All invoices must quote the Purchase Order Number and RFP Number.

Invoice(s) shall be sent to:

The University of Lethbridge
Materials Management
4401 University Drive

Lethbridge, Alberta T1K 3M4

.14 Acceptance

The terms of this agreement, as set out above, are accepted by the Consultant and the Owner upon the Consultant’s acceptance of the Owner’s Purchase Order or Award Letter. This agreement shall not be modified or superseded in any way without the written mutual consent of both Owner and Consultant.

The Parties hereto covenant and agree that this Agreement shall be effective from and deemed to have been in force from the ____ day of _____ 2011.

IN WITNESS WHEREOF the Client has duly executed this Agreement by its duly authorized representatives the ____ day of _____, A.D. 2011 and the Prime Consultant has executed this Agreement by its duly authorized representatives the ____ day of _____, 2011.

THE GOVERNORS OF THE UNIVERSITY OF LETHBRIDGE

Per: _____

Per: _____

(COMPANY)

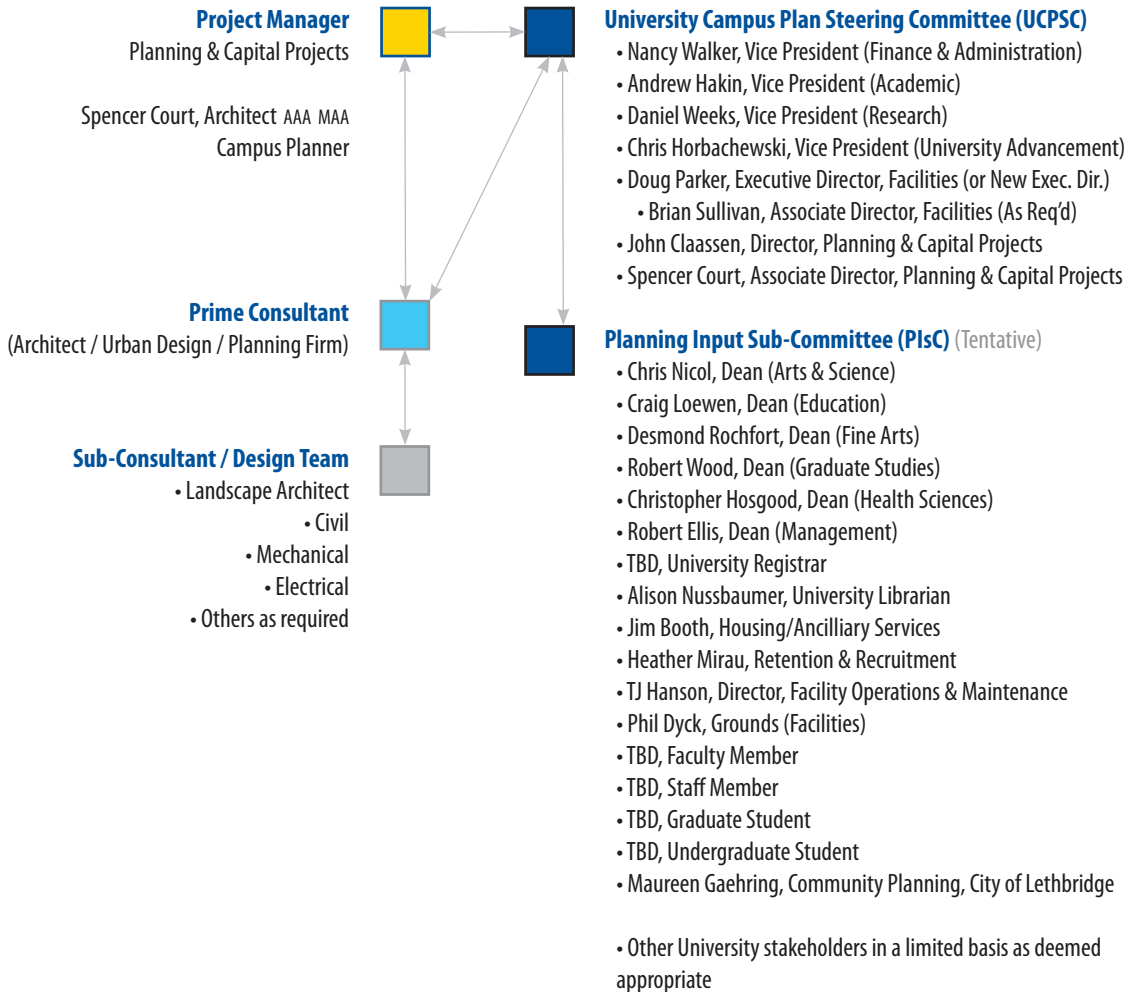
Per: _____

Per: _____

DRAFT ONLY

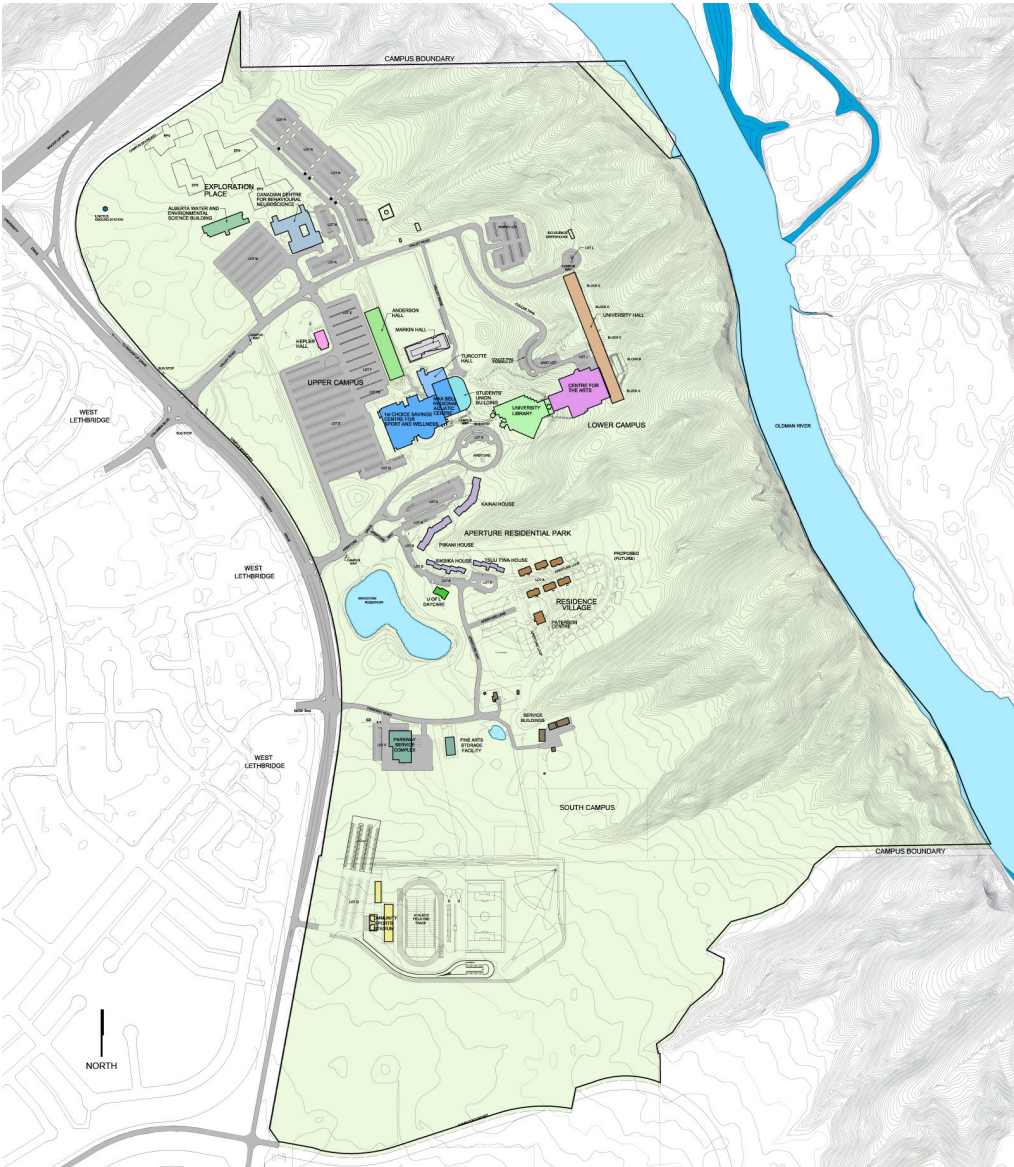
Project Organizational Chart

The University Campus Master Plan project is organized with the following anticipated communication flow and committee or stakeholder inputs as indicated below:



Current State of Campus Development (Plan Graphic)

The University main campus property and state of development at this time is represented below:



Conceptual Design Services for the Enhancement of the University Campus Master Plan
Schedule A1 – Team Member Roles & Responsibilities (Planning & Architecture)

Team Member	Commitment to Project (%)	Role	Responsibilities and Deliverables	Concurrent Projects (Describe individual's role, status and time commitment)	Relevant Projects (Describe nature of project, and date)	Role	Responsibilities (Highlight issues of relevance to this project)
John Doe	Design: 45% Construction: 15%	Principal-in-Charge	Lead Design Architect. Primary client liaison. Responsible for delivery of design drawings, and for maintaining project schedule and budget.	University of XYZ: New classroom and office building. Principal-in-Charge. Design drawings at 85% completion on June 15. Commitment: 30% to July 30 and 10% during construction scheduled from Sept. 01, 2001 to December 01, 2010. ABC Hospital: Project Architect. Schematic design will be completed September 09. Commitment: 20% to Sept. 09.	AAA College: Design and construction services for the renovation and retrofit of a classroom/ office building. (2009)	Project Architect	Associate Architect, design development and detailed design. Successfully addressed constraints of maintaining occupancy during phased renovation.
Jane Doe	...	...	...	...	...	...	...

* Note: Include production and administration personnel.

Conceptual Design Services for the Enhancement of the University Campus Master Plan
Schedule A2 – Team Member Roles & Responsibilities (Civil)

Team Member	Commitment to Project (%)	Role	Responsibilities and Deliverables	Concurrent Projects (Describe individual's role, status and time commitment)	Relevant Projects (Describe nature of project, and date)	Role	Responsibilities (Highlight issues of relevance to this project)
Ernie Watts	Design: 45% Construction: 15%	Principal-in-Charge	Lead Design Engineer. Primary client liaison. Responsible for delivery of design drawings, and for maintaining project schedule and budget.	University of XYZ: New classroom and office building. Principal-in-Charge. Design drawings at 85% completion on June 15. Commitment: 30% to July 30 and 10% during construction scheduled from Sept. 01, 2001 to December 01, 2010. ABC Hospital: Project Architect. Schematic design will be completed September 09. Commitment: 20% to Sept. 09.	AAA College: Design and construction services for the renovation and retrofit of a classroom/ office building. (2009)	Project Engineer	Associate Engineer, design development and detailed design. Successfully addressed constraints of maintaining occupancy during phased renovation.
Greg Smith	...	...	...	...	...	...	...

* Note: Include production and administration personnel.

Conceptual Design Services for the Enhancement of the University Campus Master Plan
Schedule A3 – Team Member Roles & Responsibilities (Mechanical)

Team Member	Commitment to Project (%)	Role	Responsibilities and Deliverables	Concurrent Projects (Describe individual's role, status and time commitment)	Relevant Projects (Describe nature of project, and date)	Role	Responsibilities (Highlight issues of relevance to this project)
Jake Poater	Design: 45% Construction: 15%	Principal-in-Charge	Lead Design Engineer. Primary client liaison. Responsible for delivery of design drawings, and for maintaining project schedule and budget.	University of XYZ: New classroom and office building. Principal-in-Charge. Design drawings at 85% completion on June 15. Commitment: 30% to July 30 and 10% during construction scheduled from Sept. 01, 2001 to December 01, 2010. ABC Hospital: Project Architect. Schematic design will be completed September 09. Commitment: 20% to Sept. 09.	AAA College: Design and construction services for the renovation and retrofit of a classroom/ office building. (2009)	Project Engineer	Associate Engineer, design development and detailed design. Successfully addressed constraints of maintaining occupancy during phased renovation.
Jason Bestuk	...	...	...	...	...	...	...

* Note: Include production and administration personnel.

Conceptual Design Services for the Enhancement of the University Campus Master Plan
Schedule A4 – Team Member Roles & Responsibilities (Electrical)

Team Member	Commitment to Project (%)	Role	Responsibilities and Deliverables	Concurrent Projects (Describe individual's role, status and time commitment)	Relevant Projects (Describe nature of project, and date)	Role	Responsibilities (Highlight issues of relevance to this project)
Jim Page	Design: 45% Construction: 15%	Principal-in-Charge	Lead Design Engineer. Primary client liaison. Responsible for delivery of design drawings, and for maintaining project schedule and budget.	University of XYZ: New classroom and office building. Principal-in-Charge. Design drawings at 85% completion on June 15. Commitment: 30% to July 30 and 10% during construction scheduled from Sept. 01, 2001 to December 01, 2010. ABC Hospital: Project Architect. Schematic design will be completed September 09. Commitment: 20% to Sept. 09.	AAA College: Design and construction services for the renovation and retrofit of a classroom/ office building. (2009)	Engineer	Engineer, design development and detailed design. Successfully addressed constraints of site development during phased renovation.
Judith MacRae	...	...	...	...	...	...	...

Conceptual Design Services for the Enhancement of the University Campus Master Plan
Schedule A5 - Team Member Roles & Responsibilities (Blank)

Team Member	Commitment to Project (%)	Role	Responsibilities and Deliverables	Concurrent Projects (Describe individual's role, status and time commitment)	Relevant Projects (Describe nature of project, and date)	Role	Responsibilities (Highlight issues of relevance to this project)
Tommy Chong	Design: 45% Construction: 15%	Principal-in-Charge	Lead Design Architect. Responsible for delivery of design drawings, and for maintaining project schedule and budget.	University of XYZ: New classroom and office building. Principal-in-Charge. Design drawings at 85% completion on June 15. Commitment: 30% to July 30 and 10% during construction scheduled from Sept. 01, 2001 to December 01, 2010. ABC Hospital: Project Architect. Schematic design will be completed September 09. Commitment: 20% to Sept. 09.	AAA College: Design and construction services for the renovation and retrofit of a classroom/ office building. (2009)	Project Architect	Landscape Architect, design development and detailed design. Successfully addressed constraints of site development during phased renovation.
Izzy Osborne	...	...	...	...	...	...	...

Pricing and Compensation

1.0 Pricing

The Pricing Structure for this Contract, provided by the Consultant to the Owner shall be a fixed fee pre-scribed as noted in the section for ‘Compensation’ below.

Exceptions to the above fees include the following items which shall be reimbursed by the University to the Prime Consultant at cost for the duration of the project after they occur on proof of receipt:

- 1. Printing and courier costs which include sets of documents and multiple copies of specifications or reports.
- 2. Any travel costs authorized by the University for design research and the development of information from other facilities.
- 3. Other costs paid by the *Prime Consultant* or *Sub-Consultants* on behalf of the Owners such as permit fees, licenses, and other pertinent expenses directly associated with and arising from the project.

2.0 Compensation

After the Contract has been executed in accordance with the Contract Documents, The University of Lethbridge will issue payment to the Consultant for the Work completed. Compensation for the Scope of Services and Schedule described in the Contract Documents herein will only be for:

A Fixed Fee plus invoiced disbursements not to exceed a predetermined limit.

The University of Lethbridge will pay the Consultant monthly progress payments for the Work completed to date, with final payment 30 days after completion of the Work.

All invoices must quote Purchase Order Number and RFP Number.

Invoice(s) must be sent to:

The University of Lethbridge
Materials Management
4401 University Drive
Lethbridge, Alberta T1K 3M4

Proposal Form

Conceptual Design Services for the Enhancement of the University Campus Master Plan at the University of Lethbridge main campus.

This Bid is submitted by:

Firm Name

Address

Postal Code

Telephone

Fax

To: Mr. Daryl Schacher
Manager, Materials Management
The University of Lethbridge
4401 University Drive
Lethbridge, AB T1K 3M4

I/We _____ of _____
agree to execute the Work in accordance with all RFP documents for the:

Total Fixed Fee of : \$ _____ (GST not incl.)
plus **Total Disbursements** to a maximum of: \$ _____ (GST not incl.)

The *Total Fixed Fee* and *Total Disbursements* noted on this *Proposal Form* are to include all fees and disbursements charged by the Prime Consultant and sub-consultant(s) that comprise the Planning/Design Team.

A fee breakdown of all consulting fees indicating the basis of calculations of the Total Fees and Total Disbursements attributed to both phases of the project are to be noted separately for the sub-consultants on the Planning/Design Team.

Fee Information Only (list all team disciplines - examples given below):

Landscape Architect Consultant Fee Estimate \$ _____ (GST not incl.)
Disbursements \$ _____ (GST not incl.)

Civil Consultant Fee Estimate	\$ _____ (GST not incl.)
Disbursements	\$ _____ (GST not incl.)
Transportation Consultant Fee Estimate	\$ _____ (GST not incl.)
Disbursements	\$ _____ (GST not incl.)
Mech. or Elec. Consultant Fee Estimate	\$ _____ (GST not incl.)
Disbursements	\$ _____ (GST not incl.)

1. SCHEDULE

I/We will commence work within _____ calendar days of a contract award.

2. PROPOSAL FORM REQUIREMENTS

- 2.1. All bid spaces must be completed on the Proposal Form. Errors, incomplete submissions, unbalanced submissions, or additional data or pricing not requested may render the submission invalid.
- 2.2. The Proposal shall be signed by an authorized officer or legal representative of the Corporation or Company.
- 2.3. This Proposal shall remain valid and irrevocable for 30 days from closing date.
- 2.4. Upon acceptance, by the Owner, of the Consultants proposal the Consultant agrees to:
 - ◆ perform all “Work” described in the RFP contained herein
 - ◆ all requirements, terms and conditions of the RFP contained herein
 - ◆ any addenda issued or approved by the Owner

Name of Company/Firm: _____

Signature: _____
Legal Representative or Authorized Officer

Print Name of above: _____

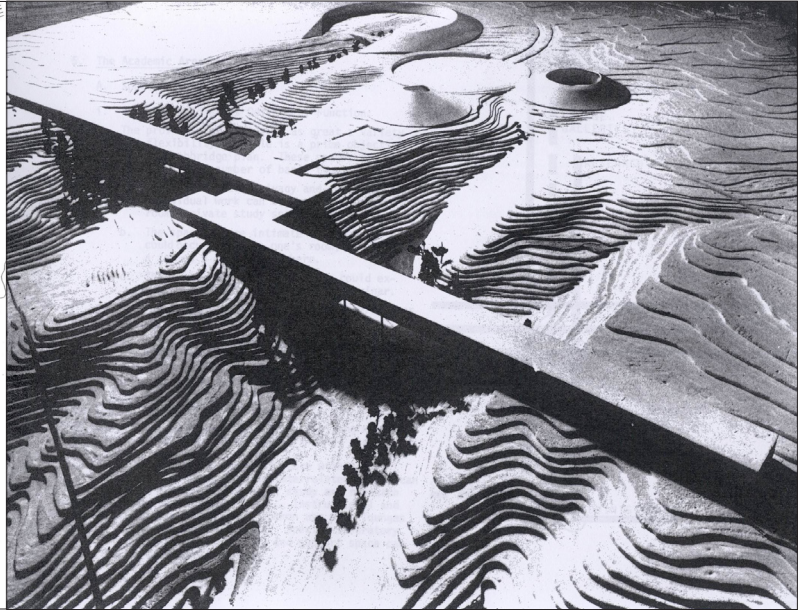
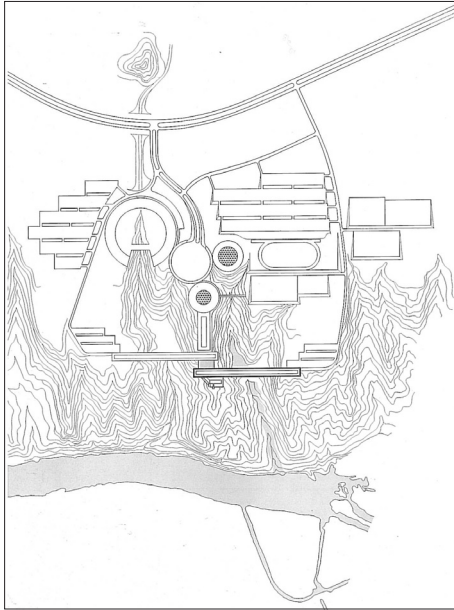
Signature: _____
Witness

Print Name of above: _____

Date: _____, 2011

Planning & Capital Projects, Facilities

University of Lethbridge □ 4401 University Drive West □ Lethbridge, Alberta T1K 3M4 □ www.uleth.ca



University of Lethbridge Development Plan (1969)
Erickson / Massey Architects