

ATTACHMENT E — COST PROPOSAL FORM

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Oregon Higher Education Coordinating Commission Strategic Capital Development Plan
Plan Process and Schedule of Fees

Phase / Task	Phases Work Description	Project Timeline										FEES	
		Sept.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May	FEES	REIMB	
1.0	Kick-off: Process Preparation, Data Collection and Review Phase											\$ 123,080	\$ 11,210
1.1	Internal Kickoff with HECC to validate scope, process, participants and engagement strategy, data needs, planning assumptions, definitions, deliverables, meeting logistics, communication protocols and schedule	○											
1.2	Identify internal and external data to drive analyses, including demographics, occupational data, Academic program CIPs, space, planning documents, HECC reports, strategic plan performance metrics												
1.3	Internal and External Document and Data Collection												
1.4	Consultant review of documentation, reports, publications, planning documents, data sources												
1.5	Identify data and information gaps and work with HECC on strategy to fill these gaps												
1.6	Web Meeting for campus Introductions		○										
1.7	Develop and Implement communication plan/issue updates and agenda for Formal Kick-off meetings	○	○										
1.8	#1 On-Site Meetings: Formal Kick-off meetings on-site at HECC, State Ag and 7 institutions (at each campus); possibly incl Health Sci		●										
2.0	Data Analysis Phase											\$ 342,880	\$ 2,200
2.1	Continued data collection from campuses												
2.2	Benchmarking other universities and best practices												
2.3	Synthesis and Analysis of Campus Data												
2.4	Environmental analysis: Demographics, Economics, Occupational Demand and Academic Program Gap Analysis												
2.5	GIS-based geo-mapping of data, including educational attainment, demographics, income levels, enrollment data and occupational demand to identify opportunities and gaps												
2.6	Identify issues related to Strategic Plan and 40-40-20 metrics												
2.7	Identify academic program needs and opportunities												
2.8	Develop preliminary data tools and dashboard including (a) Interactive heuristic model to dynamically estimate student flow into and through postsecondary education and (b) Interactive heuristic model to dynamically estimate workforce and programmatic needs												
2.9	Provide communication updates; As-Needed WebEx clarification meeting			○ ○	○ ○								
3.0	Facilitation of Discussions and Meetings											\$ 125,340	\$ 18,900
3.1	#2 On-site Meeting (HECC): Review Preliminary Findings				●								
3.2	#3 On-site Meeting: On-site Campus Meetings to review preliminary findings of data analysis; workshop to discuss academic program and space needs to address opportunities and gaps; discuss needs based on region and university mission					●							
4.0	Development of Space Needs and Capital Plan Framework											\$ 108,030	\$ 1,950
4.1	Develop space profiles												
4.2	Development of space models												
4.3	Development of capital plans												
4.4	Development of space planning tools												
4.5	Identify common denominators of need at technical/regional and largest public universities												
4.6	Confirm continued alignment with strategic plan goals												
4.7	#4 Meeting (Webcast): Present assessment of common denominators, preliminary capital development framework and draft recommendations (on-site at HECC and Webcast to stakeholders)									●			
4.8	Communication updates				○	○	○						
5.0	Final Documentation and Implementation											\$ 130,050	\$ 4,360
5.1	Review and comment period following Meeting #4												
5.2	SWOT of best practices, using benchmarking data and Consultant Advisory Board												
5.3	Finalize process draft to HECC												
5.4	Review and Comment period for draft												
5.5	Meeting #5: Final Presentation										●		
5.6	Final Documentation												
5.6	Communication updates								○	○			
SUBTOTALS											\$ 829,380	\$ 38,620	
TOTAL FEES+REIMB											\$ 868,000		

- Communication Updates (e-mailers)
- On-site Meetings
- WebEx Meetings