

RFP 24-10M – University Strategic Plan – Questions & Answers

1. Does the University of Idaho envision some of the engagement to take place in person, or does the University prefer for all engagement to be virtual?

We anticipate 3-4 in-person meetings.

2. Does the University of Idaho have an estimate in mind of the number of stakeholder interviews, focus groups, town halls, and surveys that would be preferred for this engagement?

Approximately:

- 5-10 industry partner interviews
- Two Virtual Town Hall Meetings, one to kick off in Fall 2024, and one in spring 2025 to deliver results
- Two-Three focus groups or surveys of Faculty Senate, Staff Council, alumni, donors, elected officials
- Senior Leadership Focus Group
- One internal survey to include leaders, employees, students and alumni, and one market survey (2)
- A mostly completed strategic plan will be posted for a two-week public comment period before finalizing the plan, and implementation strategy.

3. Does the University of Idaho have any guidance related to budget expectations that could help us scope our project approach and methodology?

We do not want to influence the content of the proposals by stating a preferred price range. We expect a comprehensive proposal that addresses the entire scope of work and accurately reflects the cost of the services being provided.

4. In similar strategic planning exercises, we have shared certain responsibilities, such as some of the stakeholder engagement or internal data analysis, with groups or individuals at the institution (e.g., Project Manager, Strategic Planning Council). Does the University of Idaho anticipate having internal resources take on strategic planning responsibilities to help manage the scope or would you prefer for the consulting firm to lead the entirety of the planning activities?

- Working in partnership with the consultant, the Interim Chief of Staff, will serve as the project manager.
- There will be a Strategic Planning Council (or Steering Committee) who will assist with internal stakeholder engagement.
- Institutional Research will assist with internal data collection.

5. For meetings and facilitation, what is your expectation for in-person, virtual, or a hybrid of both?

There will be a hybrid of in-person and virtual meetings.

6. If in-person is preferable, approximately how many in-person sessions do you anticipate?

We anticipate 3-4 in-person meetings.

7. Is there a project budget or budget range allocated for this work?

We do not want to influence the content of the proposals by stating a preferred price range. We expect a comprehensive proposal that addresses the entire scope of work and accurately reflects the cost of the services being provided.

8. Do you have a project timeline in mind for milestones such as the start of the project and for the final strategic plan?

July 2024 - Begin strategic planning process

Fall 2024 – Town Hall meeting with university employees

July 2025 – Complete plan

Fall 2025 – Roll out implementation strategy and framework.

9. The RFP mentions the facilitation of strategic work sessions as well other engagement points. Does the University of Idaho expect the consultant to be in-person for all work sessions and engagement points or can a portion of that work be done remotely? How many locations/campuses will the consultant need to visit?

We anticipate 3-4 in-person meetings, all within the state of Idaho.

10. Has the University of Idaho identified a budget for this project? An estimate or range will ensure that we fit our scope within the institution's budget.

We do not want to influence the content of the proposals by stating a preferred price range. We expect a comprehensive proposal that addresses the entire scope of work and accurately reflects the cost of the services being provided.

11. Which external vendor(s), if any, has the University of Idaho used for prior strategic planning efforts? **The 2016-2025 Strategic Planning effort was completed in-house. No external vendor was engaged.**

12. The RFP mentions the scheduling of roadshows. What stakeholder groups will the roadshows encompass? Will the consultant be expected to travel to these roadshow events?

We anticipate 3-4 in-person meetings which could include 1-2 Roadshows. Roadshows can also be virtual. Potential key stakeholders for roadshows are:

- University senior leadership (president, provost, deans, and other direct reports to the president and provost). Approximately 40 people.
- University Faculty Meeting – All Faculty invited
- Roadshow for all employees, virtual

13. The contract term is identified as being 5 years. What portion of the contract term is designated for the actual development of the plan? What portion of the contract term is to support on-going implementation?

Year 1 – Strategic Plan Development
Years 2 – 5 - Implementation

Question #	Reference	Question
1	General - Budget	<p>What is the expected budget for this scope of work, and how will funding be allocated over the initial term of the agreement (defined as 5 years)?</p> <p>We do not want to influence the content of the proposals by stating a budget range. We expect a comprehensive proposal that addresses the entire scope of work and accurately reflects the cost of the services being provided. Most of the work will be completed in the first year</p>

		<p>developing the plan. We are interested in proposals that include a shared responsibility for meeting goals, that is reflected in the implementation payment structure.</p>
2	Section 3 - Technical Specifications	<p>Does the University have an expected timeline for the different phases of the work (e.g., Market Research and Competitive Study, Stakeholder workshops, Plan draft and delivery)?</p> <p>From research to delivery, we expect to complete the strategic plan in one year.</p>
3	Section 3 - Technical Specifications	<p>Can the University please share the roles and responsibilities it envisions for its University employees/stakeholder community in the design, planning and execution of the Strategic Plan? How will the University establish its part in these activities working alongside the consultant team?</p> <ul style="list-style-type: none"> • Working in partnership with the consultant, the Interim Chief of Staff, will serve as the project manager. • A Strategic Planning

		<p>Council (or Steering Committee) will assist with internal stakeholder engagement.</p> <ul style="list-style-type: none"> Institutional Research will assist with internal data collection. The President, Provost, and Special Assistant to the President will provide input on direction throughout the process.
4	Section 3 - Technical Specifications	<p>Who is (or will be) on the Strategic Planning Council? Who is (or will be) the Executive Sponsor? The strategic planning council will include a cross-section of the university community, alumni and key business leaders. The Executive Sponsors are President Scott Green, and Provost Torrey Lawrence.</p>
5	General Contractual	<p>Can the University please confirm bidders may include a small number of</p>

	Terms and Conditions; Indemnity, Risks of Loss, Insurance; University of Idaho General Terms and Conditions	exceptions to the terms within their proposal, to be discussed and negotiated with the University if the bidder is selected for contract award? Yes
6	Proposal format	Will the University accept any electronic format for the proposal document for evaluation, e.g., Word, PDF, PowerPoint? All formats will be accepted.
7	Section 3 - Technical Specifications	How should the University of Phoenix be incorporated into the plan (e.g., ideas for how UI could harness it if transaction goes through)? The University of Phoenix will not be considered during the planning process.
8	Section 3 - Technical Specifications	Could you share the University's pre-planning efforts and materials related to Strategic Plan development (i.e., lessons learned)? Yes, we will have pre-planning information to share with our consultant partner.
9	Section 3 - Technical Specifications	To what extent should athletics be included in the strategic plan focus / approach? Athletics should be considered as it relates to our campus identity, recruitment and retention of students, and community and alumni engagement. Athletics does not need a

		standalone goal in the plan unless it makes sense in the categories above.
10	Section 3 - Technical Specifications	Are there major milestones to keep in mind that would be incorporated in the process (e.g., board meetings, budget deadlines)? President Green makes an annual address to the State Board of Education in April of each year. While we don't anticipate that the strategic plan will be fully complete by that meeting, it would be helpful for him to be able to share some highlights from the planning and goal setting work.

Scope: Given that this is a five-year strategic plan, what level of business case development are you looking for within this first phase (i.e., number of initiatives, level of detail on financials, etc.)?

We don't expect our strategic plan to address every single need of the university. Given the current financial limitations in higher education, this isn't realistic. Instead, our plan will focus on 3-5 core goals or pillars that are simple to remember and designed to propel the university to its next stage of greatness. The plan's success will be measured by whether everyone in our university community can recall these goals and understand their significance.

Each of our goals will guide us in prioritizing initiatives. We will focus only on those that are financially viable and have the potential to significantly impact the university, our students, and the state.

An estimated budget for the entire strategic plan and its specific initiatives is required. The budget should encompass both capital and operational costs, with projections for revenue from tuition, research grants, fundraising, and other sources. Furthermore, an assessment of expected benefits, both financial and non-financial, should be included to demonstrate the plan's value to the university, its students, and external stakeholders. This analysis should also contain a basic cost-benefit assessment, which can be qualitative or quantitative.

A balanced approach that incorporates strategic goals, financial considerations, and implementation plans is crucial to creating our actionable five-year strategic plan.

Governance: Who are the key decision-makers for this project and who are the stakeholders that will be involved?

Key decision makers are President Scott Green, Provost Torrey Lawrence, and Special Assistant to the President Chandra Zenner Ford. Stakeholders are the Strategic Planning Council, the Senior Leadership Council, Idaho Industry Leaders, and Key Government Officials.