SMITHGROUP

February 28, 2023

Mr. Steve Markiewicz
Associate Director of Planning and Construction
Indiana University of Pennsylvania
smarkiew@iup.edu

RE: Campus Plan Update

Dear Steve:

SmithGroup, Inc., ("SmithGroup") appreciates the opportunity to continue our relationship with Indiana University of Pennsylvania ("IUP") in the development and realization of the next-generation Campus Plan Update. On behalf of the SmithGroup, we are pleased to submit this proposal for the IUP Campus Plan Update in accordance with the Pennsylvania State System Higher Education (PASSHE). The following is our understanding of the services which are to be provided.

UNDERSTANDING OF THE PROJECT

Indiana University of Pennsylvania requests that the SmithGroup assist in the 2023 Campus Plan Update. SmithGroup has provided campus planning services to IUP for over a decade, including the 2011 Long Range Facilities Master Plan and Master Plan Revision, the 2014 Master Plan Revisions/Update, and the most recent 2017 Master Plan Revisions/Update.

Through our decade of work with IUP, SmithGroup has collaborated with leadership to craft the vision, framework, goals, guiding principles, and implementation strategies that have guided campus decision-making along the way. As Campus Planning leaders we understand the changing campus environment facing university leadership post-pandemic. Our Campus Planning experts understand the challenges facing universities today, including student (on-ground and virtual) enrollment, financial sustainability, operational and facility needs, academic programming, housing, diversity, equity, and inclusion. SmithGroup is energized by the opportunity to work with IUP through the next Campus Plan Update, assuring alignment with IUP's Strategic Plan for 2020-2025, as well as the University Strategic Priorities.

The existing campus plan vision, framework, goals and principles, and design guidelines are a critical basis for the Campus Plan Update. It will be important to review the current plans, guiding principles, and strategic plan alignment as part of the update process to note IUP's changes since the 2017 Campus Plan Update. The 2023 Campus Plan Update will create a new roadmap for IUP to thoughtfully identify, prioritize, and guide new projects and opportunities.

Revisions and updated sections from the 2017 Campus Plan document include:

- Review and alignment with the Strategic Plan for 2020-2025
- Review and confirmation of the Campus Plan Guiding Principles, Impact Areas and Goals
- Review and update of accomplishments since 2017
- Analysis and review of Basic Planning Data provided as required by PASSHE
- Executive Summary detailing the Campus Plan revision process, updates, and recommendations.
- Campus Framework Plan review and updates as required by PASSHE will include:
  - Physical analysis – Interface and relationship between the campus and community, and identification of the existing buildings. The SmithGroup will work with the university Project Manager to incorporate available high-level Facility Condition Assessments into our analysis.

SMITHGROUP

- o Solution Development – Development potential of university real estate and the opportunities and constraints for future development. SmithGroup will evaluate development possibilities, including strategies for implementation.
- o Space Utilization and Allocations – Space utilization and deficiencies data will be collected and analyzed as compared to PASSHE guidelines. SmithGroup will collect, analyze and recommend ways to improve the utilization of existing space and facilities. The SmithGroup will analyze and compare peer institutions as part of the data analysis and recommendations.
- o Site – Campus image, edges, open space, and landscaping recommendations will be provided based on our analysis and engagement feedback. The SmithGroup will analyze interfaces with the community, growth potential, and physical characteristics safety and security, mobility, and parking.
- o Buildings – Functional location appropriateness of facilities on campus including images and entries, use appropriateness and compatibility, flexibility and growth capacity, space adequacy, and architectural compatibility recommendations will be provided.
- ▪ Identification of new short-term, mid-term, and long-term opportunities, including phasing and implementation recommendations.

For this effort, we have divided the work into two distinct Scopes of Service. The first scope focuses on Space Optimization Work, while the second scope focuses on the broader 2023 Campus Plan Update which will utilize the data and recommendation from the Space Optimization Work to inform decision-making, scenario modeling, and plan refinement. SmithGroup looks forward to assisting IUP in the 2023 Campus Plan Update to build upon the successes of today and provide thoughtful direction and guidance to define opportunities and enhancements to shape the future of IUP.

PROJECT ADMINISTRATION

This scope of work assumes that the SmithGroup team will work with IUP's Campus Plan Update Steering Committee ("Steering Committee"). In addition to overseeing the preparation of the plan, the Steering Committee represents a wide range of university interests and works to ensure the Campus Plan Update achieves IUP's institutional goals. The Steering Committee is expected to include university stakeholders including faculty, staff, and students that represent a broad cross-section of the campus community.

The Steering Committee will make a recommendation to IUP Administrative Leadership, which should serve as the ultimate decision-making body for the Campus Plan Update. The IUP Administrative Leadership will recommend adoption to the Council of Trustees.

IUP will appoint a university Project Manager who will be the day-to-day contact for the SmithGroup team and will also serve as the on-campus point person assigned to internally facilitate and guide this process. The SmithGroup will conduct review meetings (via video conference) every two weeks with the university Project Manager to discuss project status.

ENGAGEMENT

The SmithGroup will collaborate with IUP to develop in-person engagement strategies specific to the needs of the 2023 Campus Plan Update. SmithGroup will take intentional steps to foster an inclusive approach, guided by the SmithGroup's best practices that support diversity, equity, and inclusion within campus planning. The SmithGroup will design and schedule outreach efforts to ensure that we are meeting with diverse stakeholder groups.

SMITHGROUP

A combination of in-person and online meetings will help us reach a broad portion of the campus population, particularly students, faculty, and staff.

SCOPE OF SERVICES 1: SPACE OPTIMIZATION WORK

The Space Optimization Scope of Work focuses on understanding the IUP's current space utilization and providing recommendations for optimization, identifying potential future space needs including opportunities for repurposing underutilized space, collocating programs for space efficiency, and identifying locations for growing / new future programs.

1.1 SPACE UTILIZATION & SPACE NEEDS ANALYSIS & RECOMMENDATIONS

1.1.1 Instructional Space Utilization

The instructional space utilization will show how IUP used classrooms and teaching laboratories during the Fall 2022 semester. The SmithGroup team will analyze spaces in which scheduled courses occur, melding the course file with the IUP facilities inventory. Outcomes include the hours per week of scheduled use, percentage of seats filled when the room is in use, and the space per student. These results provide observations of the characteristics of space use outlining major opportunities or deficiencies. As part of this process the SmithGroup team will utilize existing peer benchmark data to highlight best practices and identify spatial trends affecting space utilization.

The Smith Group team will review, with IUP, spaces with no utilization or extremely low utilization to determine whether they have additional uses, which might suggest reclassification of the space as a different space use code. The SmithGroup team will identify teaching laboratories where IUP scheduled only a few courses each term, thereby opening discussion as to whether these courses could be accommodated in a shared laboratory.

During a virtual session, we will review the preliminary outcomes of the instructional space utilization to determine if there are any data gaps or inaccurate assumptions.

1.1.2 Comprehensive Space Needs Analysis

The SmithGroup team will identify space needs at the base year student enrollment and staffing levels and the space required at two projected student enrollment and staffing levels and compare the needs to the existing facilities. We will work with the university to understand which programs are projected to grow, maintain, or reduce in enrollment. We will discuss the potential for new programs to be added or for existing programs to be eliminated. Incorporating these discussions into the analyses, we will determine academic space needs at the college-level based on guidelines or assignable square feet/full-time equivalent metrics. The SmithGroup team will compare space guidelines at the base and target years against the inventory of facilities available today and proposed in the future. We will recommend the best use of existing underutilized space, which programs should be collocated to achieve space efficiencies and enhance academic success, and where new programs, such as the medical college, should ideally be located.

The SmithGroup Group team will assess the following space categories as part of this space needs analysis:
- Classrooms
- Teaching Laboratories/Open Laboratories
- Academic/Administrative Offices
- Other Departmental Space
- Library

SMITHGROUP

- Student Collaboration and Gathering Space
- University Center
- Athletics
- Campus Support Services

Office space is one of the largest portions of the space portfolio, and the pandemic has significantly impacted the traditional workplace environment. Institutions have discovered ways in which remote or hybrid workplace strategies can be successful. The SmithGroup team will identify office space needs based on the application of metrics and employee titles.

1.2.3 Benchmarking

The SmithGroup team will benchmark peer institutions using comparative data. IUP and the SmithGroup team will jointly identify peer institutions and establish benchmarking criteria. The benchmarking will provide context and points of departure for discussion.

Academic Peer Benchmarking: We will compare IUP to between three (3) and five (5) similar institutions through metrics such as space per student, space per faculty, and instructional space per student. The SmithGroup team will only use data available from SmithGroup's internal data warehouses – we anticipate no new data gathering.

1.1.4 Dashboard Visualizations

The SmithGroup team will provide a series of dashboard visualizations that incorporate the outcomes of space utilization and comprehensive space needs. This interactive tool allows the user to understand and explore these analyses at any scale and discover intersections. IUP can also sort this data based on room size to identify pinch points and opportunities in managing supply and demand. We will provide access to the dashboards for three (3) users for one (1) year.

SCOPE OF SERVICES 2: CAMPUS PLAN UPDATE

For ease in understanding our approach and process, we have divided our process into three phases. The intention is that each phase will build upon the previous phase to create ideas and products that provoke the imagination and generate excitement.

- Phase 1.0: Understand
- Phase 2.0: Explore
- Phase 3.0: Realize

UNDERSTAND EXPLORE REALIZE

DISCOVER INTERPRET IDEATE FORMULATE REFINE RESOLVE
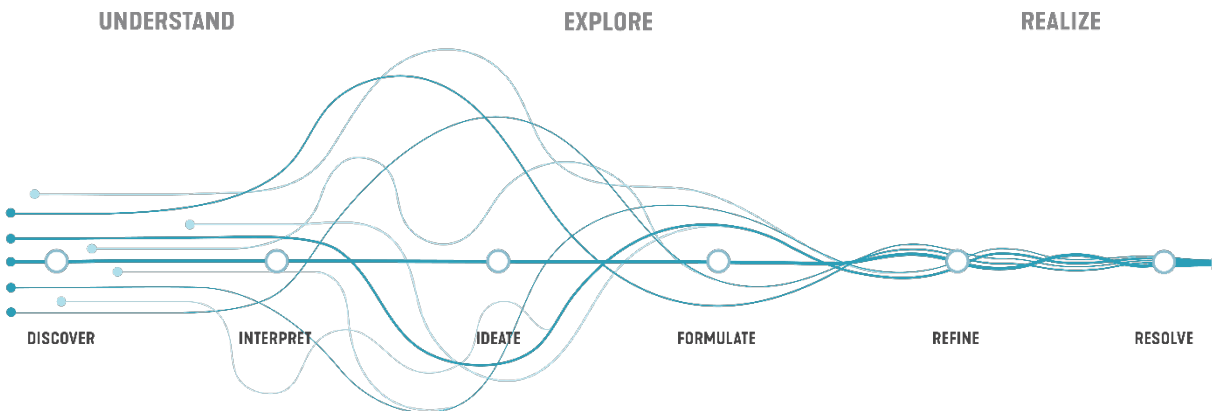
SMITHGROUP

PHASE 1.0: UNDERSTAND

The planning starts with a process of discovery—getting to know IUP, your core goals, priorities, current challenges, past successes, and opportunities for the future. We seek to interpret and understand all aspects of the campus and the surrounding context. The SmithGroup team will gain a deeper understanding of the condition of existing facilities and appropriateness of current use; pedestrian and vehicular circulation, and parking; and the quality and constraints of campus landscape, natural systems and connection to the community. These systems determine the physical framework of the campus and opportunities for long-term sustainability. It is during this process that we establish our collaborative process and the foundation for the success of the Campus Plan Update.

1.1   PROJECT ADMINISTRATION & KICK-OFF

1.1.1 Project Initiation (Videoconference)
Upon authorization to proceed, the SmithGroup team will develop an agenda and schedule a virtual session with the university Project Manager. The goals of this meeting will be to discuss project expectations and outcomes, review the schedule and project milestones, set specific dates for site visits, and outline communication protocols. We will discuss the types of data that IUP will need to gather and provide for this project, which the SmithGroup team will provide prior to the initial campus visit.

1.1.2 Campus Plan Update Steering Committee Kick-Off (Videoconference)
The SmithGroup team will lead an online workshop with the Steering Committee to confirm the overarching goals for the project, outcome expectations, and the project schedule. During this initial discussion, we will identify campus constituencies who should participate in the Stakeholder/User Group Meetings and determine if any other campus engagement is necessary.

1.2   DATA COLLECTION AND STRATEGIC REVIEW

The SmithGroup team will review and examine existing key documents and studies that we anticipate will guide the future direction of the Campus Plan Update. The SmithGroup team will create and maintain a Data Collection Matrix that tracks information requested and received to-date. The SmithGroup team will collaborate with the university Project Manager to coordinate data collection. We will request facility and site data to have an accurate understanding of existing conditions.

Academic Space: The SmithGroup team has developed a highly flexible, but very specialized, computerized approach to linking large data sets, such as course offerings, space inventories, and staffing files provided by the institution, into a single database. As we receive campus data sets, the SmithGroup team will run analytics and produce an "exceptions report" to identify any inconsistencies in the data. We will identify anomalies, such as spaces coded as classrooms without scheduled courses and course sections without space assignments. We will lead an online meeting with campus representatives to address inconsistencies, anomalies, or questions. This detailed examination of the data and concurrent discussion of standard metrics will ensure that we start with reliable information and transparent, agreed-upon parameters for the study.

Student Life, Housing and Dining: The SmithGroup team will review previously completed studies and planning reports on current student life facilities, future student life projects, housing, dining, and future goals.

1.2.1 Campus 3D Digital Model
Working with the existing IUP AutoCAD campus and floor plans, the SmithGroup team will update the existing three-dimensional model to reflect existing campus conditions. The SmithGroup team will use this

SMITHGROUP

model throughout the planning process to help depict alternative scenarios, the draft Preliminary Campus Plan, and Final Campus Plan concepts.

1.2.2 Instructional Space Utilization (Covered in Scope 1)
Instructional Space Utilization aligns with Data Collection and Strategic Review in the process, refer to Scope 1 for details.

1.2.3 Comprehensive Space Needs Analysis (Covered in Scope 1)
Comprehensive Space Needs Analysis aligns with Data Collection and Strategic Review in the process, refer to Scope 1 for details.

1.2.4 Benchmarking (Covered in Scope 1)
Benchmarking aligns with Data Collection and Strategic Review in the process, refer to Scope 1 for details.

1.2.5 Kick-Off Campus Visit (Campus Visit #1, 2 Days)
The SmithGroup team will seek to better understand the planning objectives and ascertain key issues. The campus visit will comprise of several on-campus and online events:

- Campus Tour: The SmithGroup will tour and photograph the campus to understand the changes that have occurred since the completion of the 2017 Campus Plan Update. We will tour new and existing facilities to receive first-hand knowledge of the campus and spaces. We will also tour select campus housing and dining facilities. A representative of IUP with knowledge of recent and current facility conditions and program operations will accompany SmithGroup.

- Campus Steering Committee: During an approximately two-hour meeting with the Steering Committee, SmithGroup will:
  - Describe the campus planning approach and products, the campus planning schedule, and the outreach approach
  - Lead a discussion of desired outcomes from the planning process, the university-wide strategic objectives, and early planning principles and early priorities. The committee will identify and prioritize critical issues and will discuss IUP's vision and how the campus plan goals and objectives can best align with the Strategic Plan.
  - Guide the committee in a discussion of IUP's strategic planning and its potential impact on the campus plan
  - Trends regarding planning for the modern public comprehensive university campus, and our knowledge of peer institutions
  - Potential campus plan guiding principles and how they might be relevant for both the immediate planning effort and future decision-making

- Campus and Community Open Forums: The SmithGroup team will host two (2) open forums - one (1) in-person forum on campus and one (1) online forum to be conducted after the conclusion of the campus visit. In an informal format, the SmithGroup team will provide a brief background regarding the planning process and then listen to participants express their goals for IUP and their perceptions of the current strengths and challenges of campus. Anticipated participants are students, faculty, staff, alumni, and community members. The SmithGroup team will provide a brief overview of the process and then listen to participants express their goals for the campus plan.

- Wrap-up Session: At the end of the visit, SmithGroup will reconvene with university representatives to provide a recap of initial impressions and confirm next steps.

SMITHGROUP

1.2.6 Interviews and Town Hall (series of videoconferences)

Through a series of videoconferences expected to span over 2 to 3 days, the SmithGroup team will gather input regarding the issues and goals of the Campus Plan. The empirical and experiential information gathered during these meetings will help the team understand the existing challenges and future direction of IUP and the accommodation of strategic growth and change.

Through separate and consecutive 45-minute videoconferences, the SmithGroup team will meet with identified focus groups to obtain input and guidance related to the planning process to: understand what facilities are unsuitable for current programs and what future needs might be; obtain opinions on the future of IUP from a wide cross-section of individuals; and build consensus regarding IUP's goals for growth and development. We will precede these interviews with a data-gathering survey so that the videocall is engaging and future-focused. The focus groups will address at a minimum:

- Academic Leadership (i.e., provost and deans, discuss how well current facilities support academic programs, student success, and research activities)
- Enrollment and Diversity
- Mobility and Accessibility
- Landscape
- Housing
- University Center
- Recreation and Athletics
- Circulation
- Sustainability
- Building Condition
- Capital Planning
- Borough of Indiana Leadership

1.2.7 Dashboard Visualizations (Covered in Scope 1)

Data Visualizations align with Data Collection and Strategic Review in the process, refer to Scope 1 for details.

1.2.8 Analysis Review (videoconference)

The SmithGroup team will meet with the Steering Committee and select user groups identified with the university Project Manager. The primary objectives of these meetings are to:

- Review the campus analyses and future space needs with the Steering Committee
- Establish a collective understanding of the existing campus systems and functions

PHASE 2.0: EXPLORE

During the Explore phase, the SmithGroup team tests innovative ideas and concepts on how to organize uses on campus, accommodate new footprints, create new linkages, enliven campus spaces, and think about the campus at different scales. The SmithGroup team explores a future and then refines it through interactive iterations. The final plan begins to take shape, adding specificity to the character, location, and amount of new development, renovation, re-use, or re-purposed space. We consider adjustment to systems like circulation, parking, and landscape. We develop phasing plans of proposed projects.

2.1.1 Campus Plan Guiding Principles

The SmithGroup team will work with IUP to develop and refine the Campus Plan Guiding Principles. The guiding principles will summarize salient planning drivers for the campus plan development, as well as serve as a framework following completion of the plan for future decision-making and implementation considerations.

SMITHGROUP

2.1.2 Guiding Principles Review (videoconference)

The SmithGroup team will meet the Steering Committee and select university leadership to share the Campus Plan Guiding Principles for review and comment. The primary objectives of this meeting include:
- Introduce a draft of the Campus Plan Guiding Principles
- Gain input on the range of options to explore as alternative scenarios

2.1.3 Alternative Development Scenarios

The SmithGroup team will prepare up to two (2) Alternative Development Scenarios that portray practical options for future development and change. The purpose of these scenarios is to evaluate, challenge, and/or validate existing studies and look at campus in new and different ways. These alternatives will be prepared to establish a common overarching vision for the physical organization of the campus. Each scenario will illustrate sustainable, realistic, and cost-effective options to address:
- Campus land use and organization
- Future development zones
- Building expansion/renovation and/or re-use
- Campus footprint reduction, including building demolition and campus acreage
- Optimal existing space for medical college classrooms, laboratories, and other space needs
- Potential locations for medical college housing
- Campus and community connections and integration
- Partnership opportunities
- Access and mobility patterns
- Indoor and outdoor student gathering, social, and study spaces including designated green space
- Expansion and/or reorganization of open space or recreational facilities
- Gateways, image, and campus aesthetics
- Land acquisition, disposition, and potential campus boundary changes
- Outdoor athletic facilities

2.1.4 Alternative Development Scenarios Review (Campus Visit #2, up to 2 Days)

The SmithGroup team will meet with the Steering Committee, students, faculty, staff, alumni, and the community. The primary objectives of these meetings are to:
- Introduce the Campus Plan Guiding Principles
- Describe the opportunities and challenges of each alternative scenario
- Evaluate the alternative scenarios through the lens of the Campus Plan Guiding Principles. The campus visit will comprise of on-campus and online events, including:
- **Pre-Workshop:**
  The SmithGroup team will meet with the university Project Manager regarding trip organization, meeting agendas, and the intentions of the campus visit.
- **Steering Committee Workshop:**
  The SmithGroup team will present the Guiding Principles and Alternative Development Scenarios to the Steering Committee. We will guide a critique discussion of the best components of each scenario and other comments and suggestions.
- **University Administrative Leadership Briefing:**
  The SmithGroup team will provide a high-level introduction of the purposes and intent of the Campus Plan Update, summarize the existing conditions analysis, and explore the Alternative Development Scenarios.
- **Campus and Community Open Forums:**
  The SmithGroup team will host two (2) open forums - one (1) in-person forum on Campus and one (1) online forum held after the conclusion of the campus visit. The SmithGroup team will present the Guiding Principles and Alternative Development Scenarios and guide discussion of reaction and feedback.

SMITHGROUP

- **University Project Manager Workshop:**
  Prior to departing campus, the SmithGroup team will lead a half-day workshop with the university Project Manager to review stakeholder feedback from the Alternative Development Scenario Workshops and begin to identify the strongest aspects of the scenarios to inform the Preliminary Campus Plan.

2.2 PRELIMINARY PLAN CONCEPTS

2.2.1 Preliminary Campus Plan Update
SmithGroup will prepare a Preliminary Campus Plan Update that explores a realistic path for campus development that accommodates the identified space needs, repurposes identified space surpluses, integrates new campus initiatives, and reflects the guidance of the Campus Plan Update Steering Committee. The Preliminary Campus Plan will illustrate sustainable, realistic, and cost-effective options that address:
- Campus land use and organization; future development zones
- Building construction, expansion/renovation and/or reprogramming
- Access and mobility patterns; parking distribution and transportation strategies
- Campus and community connections; gateways; land acquisition, disposition, and potential campus boundary changes

2.2.2 Preliminary Campus Plan Update Review (videoconferences)
SmithGroup will review the Preliminary Campus Plan Update with the Campus Plan Update Steering Committee. The meeting's goal will be to obtain critical early review and input regarding the Preliminary Campus Plan relative to IUP's strategic initiatives.

2.2.3 Revised Campus Plan Update and Implementation Plan
SmithGroup will prepare the Revised Campus Plan, incorporating the direction from the Campus Plan Update Steering Committee. SmithGroup will develop an Implementation Plan for the 0- to 5-year (short term), 6- to 10-year (mid-term), 10+ year (long term) horizons to support the Revised Campus Plan. These phases will highlight new construction, demolition, and renovation; site and infrastructure improvements; and modifications to roadways and parking. The Implementation Plan will illustrate IUP's facility priorities and opportunities to capitalize on program and enrollment changes.

2.2.4 Draft Illustrations
SmithGroup will prepare a series of illustrations that supports the Campus Plan Update from a campus wide SketchUp model. One (1) oblique aerial perspective will communicate major recommendations at the campus-wide level. Up to two (2) eye-level perspectives will focus on key campus locations and viewsheds. These illustrations will clarify the most important aspects of the Preliminary Campus Plan Update, with an emphasis on campus focal points, character, form, and campus gathering spaces. SmithGroup will complete one (1) round of refinements as requested by the university Project Manager as part of this task.

2.2.5 Revised Campus Plan Update Review (videoconference)
SmithGroup will share the Revised Campus Plan Update, revised illustrations, and Implementation Plan with the Campus Plan Update Steering Committee. SmithGroup will lead a discussion to receive guidance regarding the Revised Campus Plan Update and determine the Campus Plan Update Steering Committee's preferred consensus direction for the Final Campus Plan.

PHASE 3.0: REALIZE
In the final phase, the SmithGroup team will refine the Preliminary Campus Plan Update and recommendations based upon campus and stakeholder input. We will create a realistic implementation

SMITHGROUP

approach through phasing plans and decision-making processes. To conclude the planning process, the SmithGroup team will summarize final recommendations in a report narrative. This document will include text summaries, campus maps, site drawings, illustrative renderings, perspectives of select areas, and additional graphics to document recommendations for future proposed development and change. The report documents will not only serve as a record of the process, input, and decisions, but also provide materials for marketing and fundraising purposes.

3.1.1 Draft Plan Update Documentation

The SmithGroup team will document the planning process and recommendations in a concise and visual executive summary plan report intended for general communication and in a technical report that captures the Campus Plan Updates as required by PASSHE. The Campus Plan update document will illustrate the recommendations and direction for future physical development. Recommendations will include:

- Changes to land and building uses; improvements to campus accessibility and safety; and strategies to further campus / community integration
- Space analyses and recommendations
- Landscape – suggested edits to the existing design guidelines to support a more sustainable landscape
- Phasing and Implementation Plan

3.1.2 Design Guidelines Update

The SmithGroup team will review and recommend descriptive updates to the existing design guidelines supporting the vision and intent of the campus plan. Recommended edits will seek to improve open spaces, considering site resource protection, open space proportion, and connection.

3.1.3 Phasing and Implementation Plan

The SmithGroup team will develop a phased implementation strategy that identifies specific initiatives and actions, as well as evaluation as to which initiatives and actions are dependent on others. It will identify a preferred sequence and a realistic period for achieving these initiatives. We will structure the Phasing and Implementation Plan to address the 0-to-5-year (short-term) and 5 to 10 year (mid-term) horizons, with more general information provided for the 11+ (long-term) year horizon.

3.1.4 Revised Campus Plan Update Review

The SmithGroup team will virtually share the Campus Plan update and supporting recommendations with the Steering Committee. The primary objectives are to:

- Present the Campus Plan Update, recommendations, and supporting material for review
- Obtain critical input and consensus on the appropriate refinements to incorporate into the Final Campus Plan Update.
- Through a review process managed and edited by the university Project Manager, university leaders will review and comment on the draft Campus Plan Update document. IUP will provide a single redlined copy that consolidates all stakeholder feedback. SmithGroup will complete two (2) rounds of report revisions to finalize the Campus Plan Update document.

3.1.5 Final Campus Plan Update (Campus Visit #3, up to 2 days)

Based upon the consensus direction from the virtual Campus Plan Update Steering Committee meeting, SmithGroup will create the Final Campus Plan Update for presentation during a final campus visit. The Final Campus Plan Update will illustrate the recommendations and direction for future physical development.

The document will include a concise executive summary outlining the update's goals, process, and plan recommendations. For the space study, the report will include the analysis process and methodology,

SMITHGROUP

terminology, metrics applied, and recommendations for optimization of existing space and additional or new space.

The Campus Plan Update may be formatted as an appendix to the 2017 Campus Plan Update should that be the preference of IUP– no edits to the 2017 Campus Master Plan document are anticipated.

The Campus Plan Update document will be provided in PDF format suitable for posting on the university website and printing. SmithGroup will also provide editable native format documents that IUP can use to later update the document.

ASSUMPTIONS

University Responsibilities
- Collect and provide available inventory, reports, and data including Enrollment Forecasting, Housing, Dining, Mobility, Sustainability, and Infrastructure studies previously completed for review and incorporation into the Campus Plan Update
- Identification of stakeholders and focus groups
- Schedule meetings and coordinate university representatives' involvement
- Collect and provide PASSHE annual master plan basic planning data information
- Review and edit the draft Campus Plan Update document and presentations
- Manage the university document review process and consolidate all university comments into a single marked-up document.

SmithGroup Deliverables
- Request for campus inventory, reports, and data
- Work plan and project schedule identifying phases, meetings, and milestones
- Instructional Space Utilization and Space Analysis Report
- Preliminary Campus Plan Update, Revised Campus Plan Update, Implementation Plan
- Presentation materials from the Campus Plan Update Steering Committee meetings
- Draft and Final Campus Plan Update document – PDF format and editable native file formats

SCHEDULE

The process will commence with the execution of the contract. SmithGroup anticipates a project schedule of ten (10) months, commencing in March 2023 and completing by December 2023. Below is an outline of a possible schedule pending approval of IUP.

Phase 1.0: Understand
- Project Kick-Off (Videoconference)..Apr 2023
- Steering Committee Kick-off Meeting (Videoconference) .... Apr 2023
- Data Collection, Digital Model, Benchmarking...Mar-May 2023
- Steering Committee Workshop, Focus Groups, Open Forum, Tours (Campus Visit 1) .... Apr 2023

Phase 2.0: Explore
- Space Need Projections and Campus Analysis Findings (Videoconference)...................... May 2023
- Alternative Scenario Development Review (Campus Visit 2)…….…..……..…….……...............Aug 2023
- Preliminary Plan Update Review (Videoconference).. Oct 2023
- Revised Campus Plan Review and Prioritization Workshop (Videoconference.................... Oct 2023

Phase 3.0: Realize
- Draft Report Review ....Nov 2023
- Final Campus Plan Update Documents (Campus Visit 3)..Dec 2023

SMITHGROUP

SMITHGROUP TEAM

SmithGroup will be the contract holder with Indiana University of Pennsylvania for campus planning, space planning, and outreach.

ADDITIONAL SERVICES

SmithGroup will document requests for additional services or staff (if given verbally), and the work will commence upon Indiana University of Pennsylvania's approval of an estimated fee for that effort or, if not agreed otherwise, Indiana University of Pennsylvania shall reimburse SmithGroup on an hourly basis of SmithGroup's project staff actively engaged for all personnel hours worked on the project.

INTELLECTUAL PROPERTY

In rendering its Services, SmithGroup may create and provide to Indiana University of Pennsylvania documents which include (i) Indiana University of Pennsylvania internal data, analyses, recommendations, and similar items (collectively, "Client Data"), and (ii) data and/or recommendations that have been created by SmithGroup for the benefit of Indiana University of Pennsylvania as part of the Services (collectively, "SmithGroup Data"). In the development of SmithGroup Data, SmithGroup may use algorithms, software systems, plans, processes, tracking tools, contract assessment/ modeling tools, formulas, or data from third-party vendors, and other intellectual property owned by SmithGroup or which SmithGroup has the right to use as of or after the date hereof (including, without limitation, the format of SmithGroup's reports and any improvements or knowledge SmithGroup develops, whether alone or with others, in the performance of the Services) (collectively, "SmithGroup Tools"). Indiana University of Pennsylvania shall own, solely and exclusively, the Client Data delivered pursuant to this Agreement. Indiana University of Pennsylvania agrees that SmithGroup shall own, solely and exclusively, all SmithGroup Tools and all intellectual property rights therein whether or not registerable (including without limitation patents and inventions, trademarks, service marks, logos and domain names and all associated goodwill, copyrights and copyrightable works and rights in data and databases, and trade secrets, know-how and other confidential information). Indiana University of Pennsylvania acknowledges and agrees

SMITHGROUP

that SmithGroup may, and reserves the right to, use the Client Data and any information and data generated by the SmithGroup Tools solely in an aggregated, non-personally identifiable manner in order to create and improve the compilations, statistical analyses, or benchmarks provided by SmithGroup in any services (collectively, "Aggregate Data") as long as the resulting information does not identify Indiana University of Pennsylvania and Indiana University of Pennsylvania hereby grants to SmithGroup a perpetual, irrevocable, royalty-free license to use the Client Data, solely as described herein. All right, title, and interest in and to the Aggregate Data shall inure to the sole and exclusive benefit of SmithGroup. With respect to any SmithGroup Data that is contained in any documents delivered by SmithGroup to Indiana University of Pennsylvania, SmithGroup grants Indiana University of Pennsylvania a royalty free, paid up, non-exclusive, perpetual license to use the SmithGroup Data solely in connection with Indiana University of Pennsylvania's internal use of the documents and for no other purpose. Indiana University of Pennsylvania acknowledges and agrees that all SmithGroup Data (including any advice, recommendations, information, or work product incorporated into the SmithGroup Data) provided to Indiana University of Pennsylvania by SmithGroup in connection with this Agreement is for the sole internal use of Indiana University of Pennsylvania, including all subsidiaries of Indiana University of Pennsylvania, and may not be used or relied upon by any third party; provided that Indiana University of Pennsylvania may incorporate into documents that Indiana University of Pennsylvania intends to disclose externally SmithGroup summaries, calculations or tables based on Indiana University of Pennsylvania information contained in Client Data, but not SmithGroup's recommendations or findings. SmithGroup retains all rights not expressly granted to Indiana University of Pennsylvania hereunder.

DELIVERY OF CADD GRAPHIC FILES

Any electronic/data/digital files (Files) from SmithGroup shall be deemed Instruments of Service, and/or Work Product, as the case may be, for the Project identified above. Indiana University of Pennsylvania covenants and agrees that: 1) the Files are Instruments of Service of SmithGroup, the author, and/or Work Product of SmithGroup, as the case may be; 2) in providing the Files, SmithGroup does not transfer common law, statutory law, or other rights, including copyrights; 3) the Files are not Contract Documents, in whole or in part; and 4) the Files are not As-Built files. Indiana University of Pennsylvania agrees to report any defects in the Files to SmithGroup, within 45 days of the initial Files transmittal date (Acceptance Period). It is understood that SmithGroup will correct such defects, in a timely manner, and retransmit the Files. Indiana University of Pennsylvania further agrees to compensate SmithGroup, as Additional Services, for the cost of correcting defects reported to SmithGroup after the Acceptance Period. Indiana University of Pennsylvania understands that the Files have been prepared to SmithGroup's criteria and may not conform to Indiana University of Pennsylvania's drafting or other documentation standards. Indiana University of Pennsylvania understands that, due to the translation process of certain CADD formats, and the transmission of such Files to Indiana University of Pennsylvania that SmithGroup does not guarantee the accuracy, completeness, or integrity of the data, and that the Indiana University of Pennsylvania will hold SmithGroup harmless for any data or file clean-up required to make these Files usable. Indiana University of Pennsylvania understands that even though SmithGroup may have computer virus scanning software to detect the presence of computer viruses, there is no guarantee that computer viruses are not present in the Files, and that Indiana University of Pennsylvania will hold SmithGroup harmless for such viruses and their consequences, as well as any and all liability or damage caused by the presence of a computer virus in the Files. Indiana University of Pennsylvania agrees, to the fullest extent permitted by law, to indemnify and hold SmithGroup harmless from any and all damage, liability, or cost (including protection from loss due to attorney's fees and costs of defense), arising from or in any way connected with and changes made to the Files by Indiana University of Pennsylvania.

Under no circumstances shall transfer of Files to Indiana University of Pennsylvania be deemed a sale by SmithGroup. SmithGroup makes no warranties, express or implied, of merchantability or fitness for any particular purpose.

SMITHGROUP

LIMITATION OF LIABILITY

NOTWITHSTANDING ANYTHING TO THE CONTRARY AND TO THE FULLEST EXTENT PERMITTED BY LAW, INDIANA UNIVERSITY OF PENNSYLVANIA AGREES THAT THE TOTAL LIABILITY OF SMITHGROUP IN CONNECTION WITH THIS AGREEMENT, WHETHER IN CONTRACT, TORT, NEGLIGENCE, BREACH OR OTHERWISE, SHALL NOT EXCEED AND SHALL BE LIMITED TO THE TOTAL COMPENSATION RECEIVED BY SMITHGROUP UNDER THIS AGREEMENT.

MISCELLANEOUS PROVISIONS

SmithGroup will use reasonable professional efforts and judgment in responding in the design to applicable federal, state, and local laws, rules, codes, ordinances, and regulations. Indiana University of Pennsylvania acknowledges that certain state and local laws, rules, codes, ordinances, and regulations may reference standards that are outdated and/or contrary with today's industry requirements. SmithGroup cannot and does not warrant or guarantee that the Project will comply with all such outdated and/or contrary federal, state, and local laws, rules, codes, ordinances, and regulations.

Notwithstanding anything to the contrary, nothing contained herein shall be construed: i) to constitute a guarantee, warranty or assurance, either express or implied, that the SmithGroup's Services will yield or accomplish a perfect outcome for this Project; or ii) to obligate the SmithGroup to exercise professional skill or judgment greater that the standard of care exercised by other similarly situated design professionals currently practicing in the same locale as this Project, under the same requirements of this Agreement; or iii) as an assumption by the SmithGroup of liability of any other party.

SmithGroup will use reasonable professional efforts and judgment to interpret applicable ADA requirements and other federal, state, and local laws, rules, codes, ordinances, and regulations as applicable to this Project. Indiana University of Pennsylvania acknowledges that requirements of ADA, as well as other federal, state, and local laws, rules, codes, ordinances, and regulations, will be subject to various and possibly contradictory interpretations. SmithGroup cannot and does not warrant or guarantee that the Project will comply with all interpretations of the ADA requirements and/or the requirements of other federal, state, and local laws, rules, codes, ordinances, and regulations.

Thank you for contacting SmithGroup. We look forward to working with Indiana University of Pennsylvania on this project.

This document will serve as an agreement between us, and you may indicate your acceptance by signing in the space provided below and returning one (1) signed copy for our files.

Lauren Leighty _____   _____
SmithGroup (*Signature*)   Indiana University of Pennsylvania (*Signature*)

Lauren Leighty, Principal | Campus Studio Leader   _____
(*Printed name and title*)   (*Printed name and title*)

02/28/2023 _____   _____
Date   Date