



REQUEST FOR PROPOSAL: *Strategic Business and Operations Management Plan:
UCSB Faculty and Staff Housing*

To review the entire RFP please go to <http://bap.ucsb.edu/development.html>.

INTRODUCTION

The University of California Santa Barbara is aggressively pursuing a housing program in support of its faculty and staff. In response to the growing challenge of recruitment and retention of topnotch faculty and staff, due in large part to the high cost of local residential real estate, UCSB is taking major steps to meet this challenge. The campus has approvals for 172 units of new faculty and staff housing, and is in the process of updating its Long Range Development Plan (LRDP), which includes 1,562 units of new faculty and staff housing.

To strengthen its planning, the campus is soliciting proposals from professional real estate consultants, developers and business or property management firms to develop a strategic business plan and an operations management plan to help guide the campus as it begins to develop and provide workforce housing for its faculty and staff.

SCOPE OF WORK (ABRIDGED)

The following outline scope of work should be viewed as describing minimum needs; as such, the campus is providing flexibility and latitude to propose creative, well-informed alternative approaches, strategies or suggestions that address the campus' goals and objectives.

- a) Consultant/Firm to formulate comprehensive strategic business plan with integral operations management plan, and of alternative plan approaches.
- b) The strategic business plan should include comparative, pro-forma financial and cost-benefit analyses, and the management plan should consider alternative approaches. Among the issues these plans must address are:
 - How to best manage the campus' overall inventory of faculty and staff housing, including both current and future planned housing. How best to manage risk, both financial and operational.
 - How to best develop the campus' faculty and staff housing inventory, which is intended to be self-sustaining and affordable.
 - How to best incorporate stakeholders in governance while minimizing risk to the University.
 - A strategy the campus should pursue to develop and manage new residential properties available to faculty and staff at 50-70% of market value.
 - The best method and preferred management approach to controlling fixed and variable costs in a price/rent-controlled, mixed-use residential housing venture.

c) Of particular interest to the campus is what management approach should be taken to implement the faculty and staff housing program most effectively. The campus would consider at least three options that should be analyzed, these include:

- 1) Campus-Managed Operations
- 2) UC-Affiliated, Non-Profit Management Operations (i.e., Affiliated Housing Authority)
- 3) External Management Structure

Ultimately, the campus believes the Strategic Business Plan must be formulated to help inform the development of campus policies pertinent to the implementation of the faculty-and staff- housing program. Thus, the goal of this comprehensive study is to develop an integrated strategic-management plan that provides the campus with the information and tools necessary to develop sound and effective campus policies that ensure timely and efficient development, and cost-effective operations, maintenance, and management of its entire faculty-and staff-housing program.

INSTRUCTIONS TO PROPOSERS

Please review entire RFP at to <http://bap.ucsb.edu/development.html>. Proposals are due Friday, June 1, 2007. Please direct any questions to Martha Levy at 805/893-8541 (email martie.levy@bap.ucsb.edu) or Karen Rothberg at 805/893-3801 (email karen.rothberg@bap.ucsb.edu).