01 WHY

Introduction
Shape tomorrow’s leaders

Be the top university for innovation

Positively impact humanity
PURPOSE & GOALS

Strategic Facilities Visioning is a comprehensive planning effort that will inform and prioritize campus-wide infrastructure and facilities investments.

01 ARTICULATE a strategic campus-wide vision for an evolving educational and research landscape

02 ALIGN the vision across all university executive leadership, administration, academics, students, and other key stakeholders

03 PRIORITIZE infrastructure initiatives and investments to support the vision over the next 30 years
Background & Context

Strategic Facilities Visioning will build from the Chancellor’s Strategic Imperatives, Academic Futures, Strategic Plans, laying the foundation for a campus master plan update.
Outcomes

The Strategic Facilities Visioning process is designed to produce a campus vision that directly aligns with implementation strategy.

<table>
<thead>
<tr>
<th>CAMPUS VISION</th>
<th>KEY INITIATIVES</th>
<th>INVESTMENT PRIORITIES</th>
<th>PLANNING TOOLS</th>
<th>IMPLEMENTATION STRATEGY</th>
</tr>
</thead>
<tbody>
<tr>
<td>Articulate a strategic campus-wide vision for an evolving educational and research landscape</td>
<td>Identify opportunities, priorities, and requirements to support the campus vision</td>
<td>Prioritize infrastructure, real estate and facilities investments to support the vision</td>
<td>Develop methods to enable short, medium and long-term decision making</td>
<td>Create the foundation for a campus master plan</td>
</tr>
</tbody>
</table>
The year-long Strategic Facilities Visioning process is divided into four major phases of work and includes workshops every three to four weeks (15+ total visits).

**Process Overview**

1. **MOBILIZATION**
   - Project Manual

2. **1. DEEP DIVE**
   - Current State/Future State

3. **2. SCENARIO PLANNING**
   - Final Scenario & Tool Scoping

4. **3. VISION STRATEGY**
   - Draft Vision & Tool Development

5. **4. OPERATIONS PLAN**
   - Final Vision & Tool Prototype

Deliverables:
- Project Manual
- Planning Readiness
- Vision Scenario
- Vision Development
- Vision Implementation
02 WHO

Participants
Participants in the Strategic Facilities Visioning include individuals from all levels of academic and administrative departments. The process is structured by a clear channel for decision-making, project stewardship and final approval.

Decision Making Map

RESPONSIBILITIES

- University-first mindset
- Unit leaders
- Commitment to engage

- Communication & Information
- Focus on purpose & goals
- Implementation strategy

- Oversight, approval
- Make recommendations
- Ownership & implementation

START HERE

CONTRIBUTION

VISIONARIES

STRATEGIC FACILITIES VISIONING PARTICIPANTS

DEVELOPMENT

FACILITATORS

PROJECT TEAM

APPROVAL

LEADERS

EXECUTIVE COMMITTEE

APPROVAL

CAPITAL GOVERNANCE

OVERSIGHT TEAM

APPROVAL

UNIVERSITY EXECUTIVE LEADERSHIP TEAM

CHANCELLOR'S CABINET

FINAL APPROVAL

BRIEF

DEAN'S COUNCIL
Visionaries have been nominated across the university to participate in Strategic Facilities Visioning. Each visionary has been nominated because of their university first mindset and aptitude for leadership, collaboration and creativity. Visionaries include Deans, Vice Chancellors, Associate Vice Chancellors, Directors, and other unit leadership.

**University First Mindset**

The integration and alignment of unique school and department goals into a holistic vision

**Solutions-driven** leaders dedicated to the future of CU Boulder

Simultaneously **represent** your individual college or business unit and **support** the big picture of campus

Process and change **advocates** across campus
Visionaries **Strategic Facilities Visioning Participants**

- Chancellor, Philip DiStefano
- Senior Vice Chancellor & Chief Financial Officer, Kelly Fox
- Provost & Executive Vice Chancellor, Russell Moore

**PARTICIPATION BY DEPARTMENT**

- Advancement
- Athletics
- College of Arts & Sciences
- College of Engineering & Applied Science
- College of Media, Communications & Information
- College of Music
- Continuing Education
- Diversity, Equity & Community Engagement
- Enrollment Management
- Finance & Business Strategy
- Graduate School
- Human Resources
- Infrastructure & Sustainability
- Institutional Equity & Compliance
- Integrity, Safety & Compliance
- Leeds School of Business
- Office of Information Technology
- Public Policy & Advocacy
- Research & Innovation
- School of Education
- School of Law
- Strategic Relations & Communication
- Student Affairs
- Undergraduate Education
- University Counsel
- University Libraries
Facilitators **Project Team**

**William C. Haverly**
Lead
Campus Architect

**Ida Mae Isaac**
Project Manager
Capital Planning Strategist

**Mark Whiteley**
Principal In-charge

**Jill Kurth**
Project Director

**Peter Morris**
Infrastructure Expert

**Agata Malfkowski**
Design Strategist

**Leah Goodman**
Organizational Strategist
Visionary Teams

To start, teams are organized by college and business units to convey the vision, goals and needs of each respective department. As the year progresses and the emphasis shifts to implementation, teams will restructure to focus on cross-disciplinary initiatives.
Communication Flow

Your time and participation is critical. To foster meaningful engagement with you, “information in advance” is fundamental to the Strategic Facilities Visioning process. You can expect regular communication, and important information like agendas and collateral in advance of all workshops.

<table>
<thead>
<tr>
<th>TOUCH POINTS</th>
<th>VISIONARIES</th>
<th>EXECUTIVE COMMITTEE</th>
<th>CU BOULDER &amp; COMMUNITY</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Individual email</td>
<td>• On campus presentations</td>
<td>• Website</td>
<td></td>
</tr>
<tr>
<td>• Group email</td>
<td>• Working sessions</td>
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<tr>
<td>• Online survey</td>
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<tr>
<td>• In-person workshops</td>
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<tr>
<td>• Website</td>
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<table>
<thead>
<tr>
<th>FREQUENCY</th>
<th>VISIONARIES</th>
<th>EXECUTIVE COMMITTEE</th>
<th>CU BOULDER &amp; COMMUNITY</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Bi-weekly updates</td>
<td>• Every 3-4 weeks on campus</td>
<td>• Regular updates</td>
<td></td>
</tr>
<tr>
<td>• Every 3-4 weeks on campus</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

WHO TO CONTACT
All communication and questions will be fielded by the CU Boulder project team facilitators, Bill Haverly and Ida Mae Isaac at StrategicFacilitiesVisioning@Colorado.edu
Website

We are excited to share the Strategic Facilities Visioning site, dedicated to project updates, action items, and trajectory. Our intent is the site is your one-stop shop for all pertinent information.
03 WHAT
Process
Six Themes Planning Approach

The six themes of the Strategic Facilities Visioning is uniquely designed to translate a campus-wide vision into physical implementation.
Six Themes Applied

This matrix demonstrates how the six themes are applied across the phases of work. This is set out across a year long program to illustrate a deliberate methodology that is holistic and focused.
Process & Deliverables

Each phase of work culminates in a deliverable. Underneath each phase, we’ve listed the name of each deliverable and it’s major components. As a graphic interpretation of both process and deliverables, the icons relay the focus at each phase.

**MOBILIZATION**
- Project Manual

**1. DEEP DIVE**
- Current State/Future State

**2. SCENARIO PLANNING**
- Final Scenario & Tool Scoping

**3. VISION STRATEGY**
- Draft Vision & Tool Development

**4. OPERATIONS PLAN**
- Final Vision & Tool Prototype

- Measures of Success
- Growth & Change Scenarios
- Prioritization Criteria
- Identify & Rank Initiatives
- Initial O&M, CapEx, & OpEx
- Digital Tool Development
- Resource & Infrastructure Needs
- Space & Operational Standards
- Risk & Delivery Analysis
- Initiative Prioritization & Phasing
- Organizational Strategy
- New Operational Processes & Budgeting
- Resource & Cost Allocations

**Process & Deliverables**

- Scope & Goals
- Engagement Plan
- Communications Plan
- Project Kick-off
- Engagement Reports
- Benchmarks, Data Synthesis
- SWOT/Gap Analysis
- Strategic Challenges

[20]

Strategic Facilities Visioning
UNIVERSITY OF COLORADO BOLDER
WHEN
Schedule
Workshop Dates

SIX THEMES APPLIED

I. ORG. & GOVERNANCE
II. COMMUNICATION
III. RESOURCES
IV. METHODS
V. VEHICLES
VI. OUTCOMES

WORKSHOPS

ENGAGEMENT WORKSHOPS

07/30-08/01 08/28-30 09/18-20 10/16-18 11/13-15 12/5-6 01/23-24 02/12-13 03/6-7 04/3-4 & 04/24-25 05/15-16 06/5-6 & 06/26-27 07/31-08/01 08/21-22
How will we achieve this...

**STRUCTURE**
- Leadership, management & stakeholder structure
- Decision making structure, roles & responsibilities

**ON-SITE**
- Organize & facilitate kick off meetings & campus tours

**STAKEHOLDERS**
- Identify external stakeholders & timing into work plan

**COMMUNICATIONS**
- Communications strategy, channels & milestones

**DETAILS**
- Detailed work plan & schedule

---

**SIX THEMES APPLIED**
- I. ORG. & GOVERNANCE
- II. COMMUNICATION
- III. RESOURCES
- IV. METHODS
- V. VEHICLES
- VI. OUTCOMES
- ENGAGEMENT WORKSHOPS

---

**DELIVERABLES**
- Scope & Goals
- Engagement Plan
- Communications Plan
- Project Kick-off

---

**PROJECT TIMELINE**
- JUL
- AUG

---

**MOBILIZATION**
1. DEEP DIVE
2. SCENARIO PLANNING
3. VISION STRATEGY
4. OPERATIONS PLAN

---

**MONTHS**
- JUL
- AUG
- SEP
- OCT
- NOV
- DEC
- JAN
- FEB
- MAR
- APR
- MAY
- JUN
- JUL
- AUG

---

**STRATEGIC FACILITIES VISIONING**
UNIVERSITY OF COLORADO BOULDER
How will we achieve this...

**FUTURE PLANS**
- Receive stakeholder plans from each business unit

**INFO**
- Prepare advance information for extensive stakeholder meetings
- Create surveys, questionnaires, agendas and other collateral

**WORKSHOPS**
- Undertake visioning workshops
- Designated representatives
- Synthesize visioning workshops
- Incorporate workshop findings

**UPDATE**
- Stakeholder phase update
- Stakeholder final report town hall
- Refine stakeholder team for scenario planning process

**CURRENT STATE**
- Collate university background information

**DATA**
- Benchmarking of existing university state with peer institutions e.g.:
  - Efficiency and utilization
  - Research income and expenditures
  - Faculty / staff / student ratios
  - Housing, recreation/ union ratios/ student
  - Synthesize perception & data

**GAP ANALYSIS**
- Comparison of university wide growth / change models with college, school, business line plans to identify synergies and gaps

**REPORT**
- Development of strategic questions regarding background information to frame University First scenario planning efforts at next stage
- Input data into scenario planning, vision report & operations plan

**1. DEEP DIVE**
- Deliverable
  - Engagement Reports
  - Benchmarks, Data Synthesis
  - SWOT/ Gap Analysis
  - Strategic Challenges

## SIX THEMES APPLIED
- I. ORG. & GOVERNANCE
- II. COMMUNICATION
- III. RESOURCES
- IV. METHODS
- V. VEHICLES
- VI. OUTCOMES
- ENGAGEMENT WORKSHOPS
2. SCENARIO PLANNING

Final Scenario & Tool Scoping

Deliverable
- Measures of Success
- Growth & Change Scenarios
- Prioritization Criteria
- Identify & Rank Initiatives
- Initial O&M, Capex, & Opex

How will we achieve this...

GOALS
- Develop institutional goals & projection metrics as measures of success

DRAFT MODEL
- Begin scoping web based infrastructure planning tool
- Draft interactive digital model that integrates facility condition, enrollment, research, new programs, finance, human resources (faculty, administration, support staff and services) and project physical infrastructure needs

SCENARIO
- Rapid Prototyping: Round 1 - Brainstorm
- Rapid Prototyping: Round 2 - Development
- Rapid Prototyping: Round 3 - Refine
- Rapid Prototyping: Round 4 - Finalize

WORKSHOPS
- Scenario planning workshops
- Identification of new facility typologies, new programmatic mixes and new methods for delivering workplace, learning and research

DATA
- Input data into Scenario Planning, Vision Report & Operations Plan
- Final scenario plan(s) for development into Institution’s vision and strategy for future infrastructure at next stage

SIX THEMES APPLIED
- I. ORG. & GOVERNANCE
- II. COMMUNICATION
- III. RESOURCES
- IV. METHODS
- V. VEHICLES
- VI. OUTCOMES
- ENGAGEMENT WORKSHOPS

Mobilization
- 1. Deep Dive
- 2. Scenario Planning
- 3. Vision Strategy
- 4. Operations Plan
3. VISION STRATEGY

Draft Vision & Tool Development

How will we achieve this...

**ANALYSIS**
- Collate current state information
- Resources - performance - vehicles alignment analysis

**STANDARDS**
- Output vehicle needs from scenario planning workshops
- Generic space standards, efficiency and utilization attributes for workplace, learning and research

**INFRASTRUCTURE**
- Develop infrastructure priorities
- Refine infrastructure priorities for vision report

**FORECAST**
- Initial infrastructure time line and CapEx models
- 5, 10 & 15 year infrastructure needs
- Facilities investment environment and financing options

**WORKSHOP**
- Develop final vision and strategy report that aligns institutional growth and change at a college, school and business unit level with the optimal physical infrastructure and most cost-effective capital outlay, including a phase by phase roll out and location plan

**SIX THEMES APPLIED**
- I. ORG. & GOVERNANCE
- II. COMMUNICATION
- III. RESOURCES
- IV. METHODS
- V. VEHICLES
- VI. OUTCOMES
- ENGAGEMENT WORKSHOPS


JUL | AUG | SEP | OCT | NOV | DEC | JAN | FEB | MAR | APR | MAY | JUN | JUL | AUG
4. OPERATIONS PLAN

**Final Vision & Tool Prototype**

- Deliverable
  - Initiative Prioritization & Phasing
  - Organizational Strategy
  - New Operational Processes & Budgeting
  - Resource & Cost Allocations

**DEVELOP**
- Develop outcome models based on vision plan solutions
- Update interactive tool to integrate enrollment, new learning and research paradigms, programs, finance, and human resources to arrive at a final phase by phase infrastructure roll out program

**ROADMAP**
- Continue development of infrastructure plan
- Initiative roadmap which identifies the specific programs, budgets (financial information provided by university), time-lines, governance, cultural and organizational structure and responsible parties necessary to implement each strategic initiative in the short and medium term

**OPERATIONS PLAN**
- Operational planning, budgeting & change management strategy
- Operational plan which includes a gap analysis to determine resource and organizational deficiencies for each time horizon, including management and affordability analysis

**FINAL REPORT**
- Final report
- A measurement system to assess whether the strategic plan initiatives will have been successfully implemented over the determined timelines

**WORKSHOP**
- Operations planning workshops

**SIX THEMES APPLIED**

- I. ORG. & GOVERNANCE
- II. COMMUNICATION
- III. RESOURCES
- IV. METHODS
- V. VEHICLES
- VI. OUTCOMES
- ENGAGEMENT WORKSHOPS

**STRATEGIC FACILITIES VISIONING**

UNIVERSITY OF COLORADO BROWER
Next Steps

FRAMEWORK FOR A FACILITIES VISION

Campus Vision
Key Initiatives
Investment Priorities
Infrastructure Investments
Implementation Strategy

STRATEGIC IMPERATIVES

• Creates baseline for planning readiness, identify KPIs and alignment with strategic plans
• Deep Dive survey stems from Strategic Imperatives

ACADEMIC FUTURES

• Identifies drivers for current strategic initiatives and connection points
• Create direct linkages into Deep Dive framework

COLLEGE / BUSINESS UNIT STRATEGIC PLAN

• Qualifies and quantifies vision, provides data and areas of emphasis, KPIs, and goals
• Detail will inform gap analysis and identification of strategic opportunities
## Planning Readiness Scorecard

**COLLEGE OF ARTS & SCIENCES**

<table>
<thead>
<tr>
<th></th>
<th>Question</th>
<th>Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>01</td>
<td>What are your department’s top 3 goals?</td>
<td></td>
</tr>
<tr>
<td>02</td>
<td>How are these goals measured?</td>
<td></td>
</tr>
<tr>
<td>03</td>
<td>Does your department have a strategic plan?</td>
<td></td>
</tr>
<tr>
<td>04</td>
<td>How does your department’s strategic plan align with the Strategic Imperatives?</td>
<td></td>
</tr>
<tr>
<td>05</td>
<td>What is your department’s moonshot? That is, if you could accomplish anything, what would your dream goal be?</td>
<td></td>
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</tbody>
</table>
## Campus Planning Readiness Dashboard

### CAMPUS SUMMARY

<table>
<thead>
<tr>
<th></th>
<th>Top goals</th>
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| 01 | [Progress bar]

<table>
<thead>
<tr>
<th></th>
<th>Top metrics</th>
</tr>
</thead>
</table>
| 02 | [Progress bar]

<table>
<thead>
<tr>
<th></th>
<th>Number of strategic plans</th>
</tr>
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</table>
| 03 | [Progress bar]

<table>
<thead>
<tr>
<th></th>
<th>Alignment with Strategic Imperatives</th>
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<tbody>
<tr>
<td>04</td>
<td>[Progress bar]</td>
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</table>

<table>
<thead>
<tr>
<th></th>
<th>Moonshots</th>
</tr>
</thead>
<tbody>
<tr>
<td>05</td>
<td>[Text]</td>
</tr>
</tbody>
</table>
STRATEGIC IMPERATIVES

1. SHAPE TOMORROW’S LEADERS
Recruit, retain and graduate students committed to:

- Demonstrating honor, integrity, accountability, respect and contributions to the common good. Understanding, sharing and engaging diverse perspectives.

- Developing critical thinking and creative problem solving skills by fully participating in CU Boulder’s academically rigorous programs and community.

- Recognize and engage graduates who consistently demonstrate CU Boulder values and apply intellectual curiosity, rigor and collaboration to creatively address complex issues and opportunities.

2. BE THE TOP UNIVERSITY FOR INNOVATION
Serve as the nexus for innovation by facilitating collaboration and the sharing of diverse perspectives between universities, industry, laboratories and communities to elucidate and address complex issues and opportunities.

3. POSITIVELY IMPACT HUMANITY
Broaden and expand research, scholarship and creative work and articulate the positive societal outcomes they advance.
Collaborate to produce graduates who apply their CU experience to make meaningful contributions to society.
Deep Dive Survey (cont’d.)

### Volume
**Enrollment, Population Profiles**
- What are your plans for undergraduate and graduate enrollment growth?
- Can you describe your demographic types by division?
- What are your plans for faculty and staff hires?

### Quality
**Academic Delivery**
- Describe your pedagogical vision and approach.
- What are your most important learning outcomes?
- How critical is online learning to your vision?

### Experience
**Student Success, Life**
- How are the needs of your students changing?
- How do you measure student success?
- How do you fit into the CU student experience?

### Brand / Reputation
**Peers, Benchmarks**
- Who are your peers?
- Who do you want your peers to be?
- Describe the CU Boulder brand.

### Innovation
**Translation, Ecosystem**
- How will your research activity grow?
- How do you fit into CU’s innovation ecosystem?
- How is your research landscape changing?

### Collaboration
**Partnerships**
- Who are your partners?
- How do you measure your internal collaboration?
- How do you measure your external collaboration?

### Impact
**Triple Bottom Line**
- Describe your social, economic, and environmental impact.
- How do you measure your impact?
- What geographies do you impact?

### Community
**Engagement, Network**
- Who comprises your community?
- What special communities do you engage with?
- What are your primary tools for engaging with others outside the university?
## Next Steps

<table>
<thead>
<tr>
<th>#</th>
<th>TASK</th>
<th>DELIVERY DATE</th>
</tr>
</thead>
<tbody>
<tr>
<td>01</td>
<td>Welcome Email to all Participants</td>
<td>08/08/18 Wednesday</td>
</tr>
<tr>
<td>02</td>
<td>100% Project Manual</td>
<td>08/08/18 Wednesday</td>
</tr>
<tr>
<td>03</td>
<td>Draft Survey</td>
<td>08/08/18 Wednesday</td>
</tr>
<tr>
<td>04</td>
<td>Launch Survey</td>
<td>08/13/18 Monday</td>
</tr>
<tr>
<td>05</td>
<td>Collect Strategic Plans</td>
<td>08/19/18 Sunday</td>
</tr>
<tr>
<td>06</td>
<td>Close Survey</td>
<td>08/19/18 Sunday</td>
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<tr>
<td>07</td>
<td>Deep Dive Workshop #1</td>
<td>08/28-30/18</td>
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</tbody>
</table>
Contact Information

PEOPLE

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Capital Planning Strategist
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Lead
Campus Architect
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EMAIL

StrategicFacilitiesVisioning@Colorado.edu

GLOSSARY & LINKS

Strategic Imperatives
Academic Futures
Strategic Facilities Visioning Website
SELECTED EXPERIENCE

Massachusetts Institute of Technology, Cambridge, MA
- Medical Hacking Institute – Strategic visioning, Development of brand identity, governance model and business plan. Outreach, communications and fund raising strategy.
- Stanford University, Stanford, CA
- Medical School Strategic and Master Plans – Creation of strategic academic initiatives integrated with infrastructure.
- University of Southern California, Los Angeles, CA
- Biosciences Enterprise Corridor – Strategic visioning, outreach, business case, initiative roadmap and P3 advisory.
- Lehigh University, Bethlehem, PA
- New Health Institute – Strategic visioning, Development of brand identity, governance model and business plan. Outreach, communications and fund raising strategy.
- UC Berkeley / Lawrence Berkeley Lab, Richmond, CA
- Richmond Campus - Integrated business, organizational, economic and master planning for 1msqft research facilities.
- University of Miami / Frost Museum of Science Miami, FL
- Merger Master Plan – Integrated Economic, financial, organizational, operational plan to merge two institutions.
- University of Washington, Seattle, WA
- Clean Energy Ecosystem: Strategic visioning to create translational industry, university and federal partnership
- New West Campus: Economic, financial, operational and academic models. P3 development advisory
- University of Texas, Rio Grande Valley, TX
- Strategic Visioning for Merger – University wide engagement to develop strategic initiatives
- Digital Experience – Design of interactive master plan / capital planning web site and mobile app.

University of Central Florida Downtown, Orlando FL
- Strategic Academic Plan, - University wide engagement to create roadmap for a new campus of 15,000 students.
- Master Plan: Interactive model to align space needs with programs, performance, economic, social goals.
- Development and Outreach – Digital / physical communications tools for branding and engagement.

University of Minnesota AHC, Minneapolis, MI
- Strategic Academic Plan – Engagement with HSC stakeholders to develop 10-year initiative roadmap.
- Capital and Physical Planning – alignment of 10msqft real estate portfolio with strategic plan.
- Implementation - Change management for organization remodel. Financial and HR initiative implementation.

Ryerson University, Faculty of Science, Toronto, Canada
- Strategic Vision – Roadmap for school organization change. Alignment of programs with socio-economic needs, increased competitiveness. HR / finance strategy
- Development and Outreach – Development of branding and communications collateral for faculty engagement.

Loma Linda University, Loma Linda, CA
- Strategic Research Vision- Organization, operations, HR, technology and financial improvement plan.
- Development and Outreach – Development of video, branding and communications products for engagement

University of Kansas, Lawrence, KS
- Strategic Master Plan for Science – long-range comprehensive academic business plan for elevating the potential of the science learning and research capabilities.

University of Michigan, Ann Arbor MI
- Engineering Strategic Plan –comprehensive plan to align programs, enrollment with productivity and facility initiatives.

Canadian National Research Council, Ottawa, Canada
- 5-year plan for Financial, HR, operational, technology and infrastructure improvements.
SELECTED EXPERIENCE

Massachusetts Institute of Technology, Cambridge, MA
- Medical Hacking Institute – Strategic visioning, Development of brand identity, governance model and business plan. Outreach, communications and fund raising strategy.

University of Southern California, Los Angeles, CA
- Biosciences Enterprise Corridor – Strategic visioning, outreach, business case, initiative roadmap and P3 advisory.

Lehigh University, Bethlehem, PA
- New Health Institute – Strategic visioning, Development of brand identity, governance model and business plan. Outreach, communications and fund raising strategy.

University of Oregon School of Business, Eugene, OR
- Strategic Academic Plan - Strategic visioning, Development of brand identity and communications tools., Governance and operations model and business plan.

University of Miami / Frost Museum of Science Miami, FL
- Merger Master Plan – Integrated Economic, financial, organizational, operational plan to merge two institutions. Communications and outreach assessment strategy.

University of Washington, Seattle, WA
- Clean Energy Ecosystem: Strategic visioning to create translational industry, university and federal partnerships
- New West Campus: Economic, financial, operational and academic models, P3 development advisory

University of Texas, Rio Grande Valley, TX
- Strategic Visioning for Merger – University wide engagement to develop strategic initiatives
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Loma Linda University, Loma Linda, CA
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- Development and Outreach – Development of video, branding and communications products for engagement

US Air Force Academy, Colorado Springs, CO
- Cyber-works- Academic planning, operational modelling, design and industry outreach for new cyber security research and development campus

Novartis Inc., Multiple Global locations
- Comprehensive Strategic Plan – Outreach and consultation for the creation of global research and development standards. Progressive roll out across worldwide locations.

State of California Natural Resources, Sacramento, CA
- NorCal Strategic Plan – Integrated strategic planning, engagement and change management to consolidate 7 departments of 3,500 staff into a single integrated campus.

Colburn School of Music, Los Angeles, CA
- Strategic Vision – internal and external engagement to develop supply / demand analysis and validate vision
- Implementation - Academic, financial, operational planning, programming and design for redevelopment and expansion of site in Downtown LA.

Arizona State University, Tempe, AZ
- Tempe Campus Research Facilities Strategic Plan- Assessment of existing research facilities, site evaluation and master planning plus detailed business model, program and planning for the growth in interdisciplinary research in Computation, Chemistry, Biology and Molecular Sciences
SANDAG Bus Stopover, San Diego, CA
- Downtown bus stopover facility: P3 opportunities for site optimization, procurement, cost, and risk analysis

San Diego International Airport, San Diego, CA
- (SAN) Terminal 1 Replacement: Construction of a new terminal housing up to 3 new gates with associated land side and air side development. Total Cost of Ownership, evaluation of design alternatives.

Newark International Airport (EWR), Newark, NJ
- Terminal A Replacement: Construction of a new terminal housing 33 new gates with associated land side and air side development. Total Cost of Ownership budget, evaluation of design alternatives.

Colorado State University, Fort Collins, CO
- Veterinary Medicine Expansion: Multi-phase campus expansion, P3 advising.

UC Merced, Merced, CA
- Project 2020: Campus expansion to accommodate 5,000 additional FTE students. P3 Procurement development, Life Cycle Cost, Value For Money/Risk Assessment. Analysis of existing campus operations and cost basis to establish space and functional needs for the expansion, set ongoing budgets for both availability payments and retained costs.

University of California, Sacramento, CA

Federal Transit Administration, Portland, OR
- South Corridor and Portland to Milwaukie Light Rail Extensions: 20-mile expansion including 15 new stations, 21 light rail cars, expansion of existing operations center. Design, procurement, and installation of all utility relocations, civil works, structures, guideway, track, signal, communications, traction power, overhead catenary, life safety work and system, real estate and easement acquisitions to support the extension of the existing light rail system. Cost planning and modeling, review of owner generated cost plans, market and economic analysis and risk assessment and management services.

USAF Economic Analyses. Various Air Force Bases, Nationwide
- AECOM was retained by the USAF to provide economic analysis of development opportunities at six Air Force bases across the country. The studies specifically looked at opportunities for Public/Public and Public/Private partnerships to enhance operational readiness, community engagement and asset utilization. Peter led the analysis teams to develop costs and benefits and apply life cycle based Cost/Benefit Analysis.

Chatham University, Pittsburgh, PA
- Eden Hall Campus Master Plan: Zero environmental footprint/zero net energy, carbon modeling and cost consulting
SELECTED EXPERIENCE

University of San Francisco, San Francisco, CA
- Strategic Visioning Planning Study, Gleeson Library - Study to uncover the future of Gleeson Library through leadership workshops, benchmark studies, on-site observations, focus groups, student engagement exhibits, and intercepts.

Accenture, Global Account
- Future of Learning Centers Vision – Gathered perspectives and insights from those defining, sponsoring, and delivering learning experiences, as well as from learners themselves. Discovered the relative importance of place, programs and people in the equation for learning, as well as other significant factors and aspirations influencing the learner journey.

City of San Francisco, San Francisco, CA
- Permit Center Experience Research - Study conducted over the course of several months to explore San Francisco’s customer permit experiences; front-end and back-end work processes and technologies that enable and deliver those experiences; and best practices for one-stop permit centers in comparable jurisdictions.

City of San Francisco, San Francisco, CA
- Change Management - Developed change management strategy which included readiness for change, guideline for how to best communicate critical changes, outlining communication principles, key messages and themes and how to implement the change.

Adobe, Global Account
- Future of Workplace Strategy - Conducted a variety of qualitative and quantitative workplace research methods inorder to inform findings and recommendations.

Stanford University, Stanford, CA
- School of Engineering Space Utilization - Conducted an analysis process for auditing space use by examining the headcount, room allocation, and space use across the various space types and buildings.

Department of Defense, Silicon Valley, CA
- DILX - Design Silicon Valley collaboration workplace that fosters military and Silicon Valley partnerships, cultivating new innovative technologies and ideas.

Plantronics, Hoofddorp, Netherlands
- Soundscape exposition design - strategy, experience design and design ideation of immersive sound exhibition strategy including building entry, parking lot, lobby, mezzanine, and secondary floor exhibitions.

Palo Alto Networks, San Jose, CA
- Change Management - Developed change management strategy which included focus groups, on-site engagements, introductory video, and a comprehensive employee website.

HP, Palo Alto, CA
- Change Management Roadmap - Created a comprehensive change management roadmap for implementation on a global scale.

San Francisco International Airport, San Francisco, CA
- Principles of R.E.A.C.H. 2.0 - Collected qualitative and quantitative data through executive interviews, focus groups, on-site observations, mobile terminal exhibition, and digital experience tool documenting passenger journey to the airport.

San Francisco International Airport, San Francisco, CA
- Waste Messaging Study - Evaluated the effectiveness of various waste messaging and graphic options for waste diversion and sorting accuracy.

De Young Museum, San Francisco, CA
- Collected both quantitative and qualitative data to understand visitors’ behaviors and experiences in the museum.

PG&E, San Francisco, CA
- Balanced Workplace Playbook

BareMinerals, Global Account
- Global Retail Strategy

Chicago Museum of Science and Industry, Chicago, IL
- Numbers in Nature: A Mirror Maze - Exhibit master planning, interpretive planning, content development, exhibit design, graphic design, interactive development, production management, and project management

Chicago Architecture Foundation, Chicago, IL
- Chicago: City of Big Data - Creative strategy, environmental design, and graphic design
SELECTED EXPERIENCE

Sustainability Hyper-Innovation Collaborative
- Founder: Design thinking studio driving business solutions to global problems via rapid innovation events
- Engaged diverse businesses, researchers, and government entities to redesign 3P for efficient and responsive transportation planning

Spraying Systems, Co., Shanghai, China
- Sustainability Planning: materiality analysis, triple bottom line assessment, stakeholder assessment, survey design, and management interview to develop a 5 year roadmap, KPI & corporate goal for the creation of a corporate sustainability program

Tri-Met, Portland, OR
- Bike Expansion Study: Best practices, density, and location study for city bike network expansion

Essex Construction, Eugene, OR
- Waste management survey over construction sites to determine waste efficiency and reduction practices for cost and environmental benefits

Trailblazers Community, Portland, OR
- Sustainability Communications: internal/external marketing plan for communication alignment and strategic planning around CSR actions of the team and Moda Center

University of Oregon, Eugene, OR
- Climate Action Plan: Advise university policy, initiatives, and goals to lower campus GHG emissions

City of Eugene, Eugene, OR
- Electric Fleet Vehicles: Purchase prioritization and tool development for electric fleet replacements to prioritize carbon reduced per dollar spent

Lime, San Mateo, CA
- Strategic Planning: Creative visioning, financial planning, and organizational alignment over the next three horizons

Chicago Cares, Chicago, IL
- Discover Financial Services Corporate Day of Service: scoping, logistics, and event planning for 600 employee volunteer day
- Serve-a-thon: Lead project scoping and client management of 30 facilities for a 5,000-person volunteer event
- Over 40 customized volunteer events created

A Safe Haven
- Volunteer and logistics management for a food pantry serving 200 families weekly
- Solo volunteer management leader for 5K and Stand Down hosting 2,000 participants
- Development of a corporate volunteer program

EDUCATION
MBA, Sustainable Business Practices, Organization Strategy & Leadership
University of Oregon, 2018
BA Urban Planning, Environmental Studies
Cum Laude Graduate
Western Michigan University, 2011

AFFILIATIONS
Clinton Global Initiative University
Net Impact Climate Fellow
Global Reporting Index (GRI) Certified

AWARDS
SFU Net Impact Case Competition, 2017
NCGE-AAC WMU recipient, 2011
Congressional Medal of Service
Presidential Service Award
THANK YOU