

# A Challenging Time to Build but a Great Time to Plan - Are You Ready?

## A 7-point Pre-Master Planning Checklist (plus RFP Templates)

January 2024

A 5-minute read or 1-minute skim whitepaper.



This post was written in January 2024, a time characterized by high construction costs, elevated interest rates, a difficult financing environment, and still persistent staffing challenges. It's undoubtedly a demanding period for building any type of senior living project.

However, **individuals who have experienced and persevered through previous stressful times understand that this is also an opportune time to commence master planning.** While circumstances continually evolve and never return fully to the previous "normal," they eventually settle into a "new normal." Those who engage in proactive planning now will be best prepared to begin their development plans and gain an advantage over those who are less prepared when things do return more to normal.

***Will you be prepared to move forward in post-pandemic, high-construction costs, long-term staffing challenges, and new-normal interest rate environment serving an entirely new type of senior?***

There has been much written about the best way to undertake successful master planning and we have provided links to resources on master planning below. Based on my experience working on numerous master plans, **the most effective master planning process can be broken down into four key steps:**

### 1. Understanding

- a. Due diligence, fact-gathering, and initial master plan program, resulting in the creation of a comprehensive "Briefing Book" to ensure alignment of all parties before step two.

### 2. Envisioning

- a. Either a charette, a multi-day intensive and collaborative charette design process while simultaneously running financial projections, or a less-intensive iterative design-client feedback-numbers process, in either case leading to the identification of 1-2 preferred preliminary options for further evaluation.

### 3. Refinement

- a. Iteratively refining and testing various assumptions to arrive at a final financially feasible final preferred option.

### 4. Implementation

- a. Presenting the final plan to the Board, Owner or other stakeholders accompanied by an implementation business plan.



However, before embarking on the master planning process, it is crucial to ascertain whether you are genuinely prepared to initiate it. Having led and/or participated in dozens of master planning efforts over the years, I can assure you that if you start the process before you are ready, your master planning process will inevitably get delayed, bogged down, or detoured.

Below is a list of **seven questions to determine if you are ready.**

### 1. What is the CEO's / Executive Director's expected tenure?

Will the CEO/ED still be at the helm for the next 2-4 years? Master planning and development are long-term endeavors that extend over several years. If the community CEO/ED intends to retire or take another role within the organization within that timeframe, it becomes crucial to contemplate succession planning at present or, at the very least, ensure that potential successors are included in the process.



From my personal experience, I have witnessed substantial financial resources allocated to master planning go to waste when a new CEO/ED with a different vision assumes leadership, necessitating a complete restart of the entire process.

### 2. Can the CFO run the necessary reports?



A well-crafted master plan always includes the crucial consideration of the "what if we do nothing" option. This approach requires a genuine understanding of not only your key metrics such as days cash, debt coverage ratio, debt capacity, net operating margin, and more, but also a comprehensive assessment of your margins across specific service lines, such as apartments, cottages, assisted living, memory care, nursing, home health services, and others. It is imperative that your CFO can provide precise information on the profitability (or loss) associated with each aspect of your service line. If your CFO is currently unable to do so, it is necessary to figure out what steps are needed with your reporting system to ensure they can deliver these critical calculations needed for the master planning process.

I have witnessed master plans encounter significant delays as they veered off course, with the CFO grappling to compile these essential metrics. Therefore, it is of utmost importance to streamline and optimize financial reporting beforehand to prevent avoidable financial reporting slowdowns during the master planning process.

### 3. Does your Facilities Director have the goods?

During the due diligence phase of the master plan, it is essential for the facilities director to furnish plans, specifications, as-builts, and other pertinent information regarding the site and building infrastructure of the existing community. While some are well-prepared with this data readily available, I have also observed instances where the master planning process comes to a standstill as the facilities team delves into the depths of the facility catacombs in search of this vital information.



To ensure a smooth and efficient master planning process, it is crucial to proactively gather and organize the necessary documentation related to the site and building infrastructure. This allows for timely access to the required data, eliminating unnecessary delays and interruptions during the master planning journey. Typical reference documents include but are not limited to prior master plans, construction documents and specifications, product data, shop drawings, soil reports, utility data, capital asset replacement studies, etc.

#### 4. What is your initial vision?



Master planning is an intensive, collaborative process. The best master planning sessions often end up with recommended ideas and solutions that no one had contemplated when the process started.

But the process must begin with initial ideas to test. And they should be referenced in the Request For Proposal to the various master planning consultants. Do you have a list of current vision ideas you want to vet in the master plan? If not, you need to start ruminating on that list prior to starting the master planning process.

Of course, all these initial vision items should be in alignment with your overall mission and values, previously created strategic plans, and any internal SWOT analysis.

Examples of initial vision items I have seen lately include:

- Rightsizing or eliminating skilled nursing.
- Adding or recalibrating memory care.
- Adding new independent living – both number and types of units.
- Converting older independent living stock to assisted living.
- Expanding home health.
- Refreshing the commons or seeking partnerships for new external commons.
- Fostering intergenerational engagement on and off campus.
- Developing a satellite campus.
- Differentiating a traditional life plan campus from new for-profit rentals.
- Implementing design and operations changes with the goal of making the community the employer of choice.
- Forging strategic partnerships both on-site and offsite.
- Considering or evaluating the pros and cons of an affiliation or merger.
- Integrating the existing Capital Expenditure plans including new low voltage/technology.
- Transforming the day-to-day desired resident and staff experience on campus.
- Developing a recognizable branded destination campus.

#### 5. Is your Board and Leadership Team up to the task?

I have witnessed instances where the master planning process gets bogged down when the CEO possesses a clear vision for the future and understands the current challenges, while the Board, Leadership team, or residents lack awareness or comprehension of, or hold substantial disagreements regarding, the nature of these challenges or the envisioned future.



When such misalignment exists, it necessitates engaging in several "tough love" conversations with the Board, Leadership, and/or residents, addressing the challenges and opportunities. These discussions should take place before the master planning process begins. While the master planning process itself can help foster consensus on challenges and long-term vision, its primary focus should lie in brainstorming, crafting, and testing solutions to agreed-upon problems, rather than getting bogged down trying to achieve consensus on what are the fundamental challenges in the first place.

Another integral part of this process involves identifying the key stakeholders who will participate in the master planning preparation and charette. Different communities take varied approaches, some involving their entire Board, while others assemble a smaller planning committee. Similarly, the scope of involvement may vary for the leadership team, some including all departments while others include only those most affected such as facilities and healthcare. The inclusion of residents also varies, ranging from involving the entire community to selecting a handful of residents with the understanding that they will not disclose information about the process until it is completed. This ensures that any blue-sky concepts that have yet to be thoroughly vetted are not prematurely communicated as final decisions.

#### **6. Do you have a plan for identifying the consultant team?**



Master planning is a multi-disciplinary and collaborative process. One of the most significant pitfalls I have observed over the years is when the owner solely relies on the architect to lead the process, resulting in a premature focus on design rather than first prioritizing market analysis, industry trends, operational considerations, financial feasibility, and other critical factors that should then guide the design.

To ensure a well-rounded approach, it is essential to involve key outside consultants as part of the master planning team. The following are recommended consultant team members:

- a. **Mandatory Consultant Team Members:**
  - i. **Design Team (Architect, Land Planners & Engineers)**
    - A firm with direct experience in addressing the specific challenges your community faces, holding the necessary licensure in your state, and possessing strong expertise in master planning.
  - ii. **Preconstruction Pricing Consultant / Potential Contractor**
    - A firm with local market experience capable of providing construction costing input for various master planning options, as well as insights on phasing, scheduling, and construction logistics.
  - iii. **Development/Feasibility Consultants:**
    - An individual or firm proficient in financial analysis but who can also work closely with the team to guide the overall master planning process, ensuring that all disciplines are heard.
    - They should also be capable of creating the initial draft of a detailed development schedule, comprehensive proforma, and implementation plan based on the outcomes of the master plan.
- b. **Case-by-Case Decision:**
  - i. **Civil Engineer:**
    - In situations where the site poses challenges or has an outdated infrastructure, a civil engineer can assist the architect in navigating through these issues.
  - ii. **Market Analyst and/or Sales Consultant:**
    - If you don't have recent market studies backing up your vision, or your marketing and sales team does not have a deep quantitative and qualitative understanding of the market and/or experience with selling or preselling the elements of that vision, a third-party market and/or sales consultant becomes a valuable team member.

- iii. Financing:
  - If the existing project has existing debt covenant requirements and/or is contemplating significant additional debt to implement the master plan, involving your banker or underwriter at various stages of the master planning process can provide valuable insights.
- iv. Specialty Consultant:
  - Depending on your initial vision, consider engaging specialized consultants such as memory care experts, home health advisors, or childcare advisors.

Included below are samples of Request for Proposal (RFP) templates for architect/ design team, preconstruction/ potential contractor, and development/feasibility consultant. Feel free to reach out to me if you would like complimentary templates for other consultant roles.

### 7. Do you have the time?

Finally, achieving success in master planning requires significant attention and focus from the CEO and the leadership team. I have observed instances where master planning efforts yielded less-than-ideal outcomes due to distractions faced by the CEO, leadership team, or even the Board, as they grappled with other pressing needs or initiatives. For example, I recall a situation where a CEO disappeared during the middle of a master planning charette to address a long-standing but unrelated community issue, casting the master planning process adrift.



The reality is that CEOs and leadership teams are always busy with numerous responsibilities. However, it is crucial to ensure that your team has the capacity to dedicate the necessary time and effort for adequate preparation and contemplation, which are crucial steps in assembling a qualified team, participating in the initial due diligence steps, and then creating a truly outstanding master plan.

The core leadership team must be identified, engaged and understand this is one of their highest priorities during the process as this is creating the roadmap to your future.

In conclusion, **Master Planning can serve as the first step to securing the continued and/or future success of your community. Thus, it is of paramount importance to embark on the process fully prepared for success, taking into account your answers to the questions above.**



[www.witzonline.net](http://www.witzonline.net)

**Witz Company Provides Master Planning and Project Development Management to Senior Living Communities Nationwide.**

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## Additional Master Planning Resources

### **Team-Based Master Planning:**

**The Most Efficient Way to Bring an Expansion or Start-up Community to Reality**

<https://witzonline.net/wp-content/uploads/2020/08/Whitepaper-Team-Based-Master-Planning-Final-1.pdf>

### **4 Practical Ways to Build Financial Flexibility into a Senior Living Master Plan**

<https://loveandcompany.com/blog-post/4-practical-ways-to-build-financial-flexibility-into-a-senior-living-master-plan/>

### **A Senior Housing Master Planning Mantra**

<https://loveandcompany.com/blog-post/senior-housing-master-planning-mantra/>



**Request for Proposal Template**

**Architect / Design Team**

**Master Planning Services**

<date>

**1. Introduction**

<Community> (Name) is an existing <type of community> located in <city>, <state>

The community is undertaking a master planning process to build upon its current strengths as well as address current weaknesses in order to keep the community attractive to both current and the next generation of retirees.

<Name> is issuing this Request for Proposal for to identify an architectural firm to assist with master planning for their existing campus (if applicable - and an adjacent site available for possible future expansion.)

Per the timetable below, proposals are due via email by <date>

**2. Current Community Description**

**a. Existing Project & location**

<Name> is located on a <acres> acre parcel at <address> in <city>, <state>.

<City> is in a <urban, suburban, rural> location in <county name> . The area is characterized by <strong, stable, declining> population and economic activity as evidenced by <stats>

The community was originally developed in <date> with additional expansions and renovations in <date>

Current service line offerings at the community include:

- <#> units of independent living units under a Type <A,B,C> <entry fee/rental> model
  - Unit sizes range from X to X SF
  - Pricing ranges from X to X
  - Licensed under <State> as X
  - Current occupancy is X
- <#> units of assisted living
  - Licensed under <State> as X
  - X occupancy
- <#> units of memory care assisted living
  - Licensed under <State> as X
  - X occupancy
- <#> units of as skilled nursing care of which
  - X are short-term rehabilitation beds with X occupancy
  - X are long-term skilled nursing beds with X occupancy
  - Licensed under <State> as X

The community has <no/ X> acres of undeveloped land for a possible expansion

<insert campus map>

<insert campus aerial>

The community financials include the following:

- \$X in long-term debt issued in <Date> through <Issuer>
- X Days Cash on Hand including approximately \$X in long-term investments
- X Debt Coverage Ratio

#### **b. Existing Strengths & Challenges**

Current strengths include the following

- (list)
- (list)
- (E.g. “excellent reputation for care, religious affiliation, beautiful and unique surroundings, dedicated staff, administration & Board, value and affordability, available land and, financial metrics and resources necessary to consider a redevelopment of the campus.)

Current challenges includes the following

- (list)
- (list)
- (E.g. “a dated campus with physical & function obsolescence, dated commons, long walking distances thru narrow hallways in independent living, only one dining venue, medical model assisted living, no memory care program and primarily semi-private rooms in skilled nursing.)

Additional challenges to address during master planning would be two-fold.

- (list)
- (list)
- (E.g. First, while the community is generating positive cash flow and has no debt, its cash position and debt capacity is such that any redevelopment would need to include, besides just improvements to existing units and commons, new revenue generating items such as new independent living apartments or net revenue generating healthcare components. )
- (E.g. the master planning approach must be grounded in the income and asset levels of the target population which is moderate to middle-income. )

#### **3. Master Plan Vision**

<Name> desires to undertake a master planning process to best position the campus for long-term growth and expansion.

The goal of the master planning process is to strengthen the existing campus and create a complimentary and synergistic long-term and multi-phase plan for an expanded and new campus.



The current vision for the master plan is to include some or all of the following elements

- (List vision ideas, e.g.)
  - (New or renovated independent living)
  - (New or renovated assisted living)
  - (Reconfiguration of the health center)
  - (Refresh commons)
  - (e.g. “expand existing senior living options and include other non-senior living uses in order to create a walkable intergenerational village incorporating elements of new urbanism, mixed-use design and placemaking. The vision is to create a successful project which is welcoming, diverse, walkable and has a ‘sense of place’ and does not ‘look like senior living’”)

<Name> may self-develop these plan elements, joint venture with other developers, and/or serve as a master developer and set the vision and architectural guidelines which would be followed by other developers.

Along with the selected architect, those involved in the master planning process would include:

- The community CEO and leadership team
- Select members of the Board of Directors and Planning Committee
- At various times in the process, possibly various community stakeholders including family members, potential and future residents, local community members, etc.
- Outside Consultants for some or all of the process
  - Pre-Construction
  - Local civil engineer
  - Market research
  - Finance consultant & underwriter
  - Development consultant

It is expected that the selected architect would work collaboratively with the development consultant, community leadership and the other consultants to create and implement a master planning and charrette process which would include:

- Review of current market demographic data, competition and penetration rates
- Discuss potential seed capital and current/ future borrowing capacity
- Discussion of current senior living trends, both industry and the consumer
- Visioning the future campus including in-depth discussion of desired resident/ user/ staff experience
- Initial programming and initial financial feasibility
- Site planning
- Long-term phasing and development plan and updated financial feasibility

The result of the master planning process would be a Vision statement, program, site plan, preliminary construction estimates, financial model and phased development plan and schedule which integrates both the existing campus and the newly added/renovated project elements.

**4. Selection Process Timeline and Master Planning Schedule**

<Date>	Requests for Proposals sent
<Date>	Proposals due
<Date>	Notice of firms to interview
<Date>	Interview firms at the <name> campus
<Date>	Notify selected firm & send additional data package
<Date>	Selected firm will work with <Development Consultant> and other selected consultants in other disciplines (preconstruction, finance, etc.) to create the final schedule and timeline for the Charette & Master Planning kickoff
<Date>	Target for Charette & Master Planning kickoff
<Date>6	Target for Board meeting – interim progress update
<Date>	Target for Board meeting- presentation of Final Master Plan

**5. Information to Provide in Proposal**

Proposals should be emailed to <email>.

Only digital submissions are accepted.

Our ideal candidate would:

- Have extensive master planning and senior living experience, ideally in our market or region
- Be able to work collaboratively with the master planning team,
- Be able to present an overview of current senior living trends,
- Have great master planning design skills,
- Be a potential candidate to provide architectural design services if the project proceeds past master planning including local or state regulatory experience, proven examples of designing to a schedule and a budget, creating quality construction documents, and providing construction administration services.

Please provide the following information and in the following format and order.

- 1. Name of firm and any firms with which you are partnering**
  - a. Note, we understand applicants may partner with other firms in order to bring expertise in all areas, please identify and provide information on the experience of any project partners
- 2. Information about and history of your firm** including organizational chart and business volume for the past three years.
- 3. Related Project Experience**
  - a. Provide information on recent projects of similar size and scope for which you have provided master planning services - ideally, communities such as ours, i.e. <description>
  - b. For each project provide the following information
    - i. Project description and location, if non-profit or for-profit
    - ii. Existing or Previous site plan
    - iii. Outcomes of master planning process and revised site plan, if applicable.
    - iv. Regulatory and approval issues (if any) for the project
    - v. Owner/ client name
    - vi. The assigned Project Manager & Project Architect from your firm
- 4. Master Planning Approach**
  - a. Provide a summary of the methodology you typically utilize during the master planning process and how it incorporates feedback and input from all various stakeholders, e.g. current residents, potential residents, administration and staff, board members, etc..
  - b. Confirm that your process would include a formal presentation on senior living trends
  - a. Note specifically your philosophy of and integration of intergenerational, new urbanism, mixed use elements.
- 5. Project Team**
  - a. List the services that would be provided by your firm and provide the names and resumes of the individuals from your firm who would be assigned to this project
- 6. Form of Agreement & Fees**
  - a. Provide a form of agreement, or outline of same, including fees and estimate of reimbursable costs, deliverables and timing.
  - b. Submit a fee schedule and maximum cost for your proposed services including timing of billing and any out of pocket or expense charges.
  - c. Provide hourly rates or other basis for billing for additional services and what those additional services might be.
  - d. List the services you will conduct in-house and those contracted. For contracted services, list preferred vendors, if any, and provide a brief description of these firms and their principals.
- 7. Deliverables & Schedule**
  - a. Describe the deliverables you would expect to provide as a result of this engagement.
  - b. Confirm that you can undertake this work with a start date of <date> with final Board presentation <date>
- 8. References**
  - a. Please provide at least three references of other similar clients who we may contact.
- 9. Future Services**
  - a. Please provide information about other services your firm is able to provide to us beyond the scope of the master planning proposal if we should proceed into development or construction steps following the master planning process.
  - b. Provide a range of typical fees for architectural work if selected to provide architectural design to implement the master plan.
- 10. Other**
  - a. Please provide any other information you believe is relevant to our selection process

**Request for Proposal Template**  
**Preconstruction Pricing Consultant / Potential Contractor**  
**During Master Planning**  
<date>

**1. Introduction**

<Community> (Name) is an existing <type of community> located in <city>, <state>

The community is undertaking a master planning process in order to build upon its current strengths as well as address current weaknesses in order to keep the community attractive to both current and the next generation of retirees.

<Name> is issuing this Request for Proposal for to identify a contractor or preconstruction services consultant to provide input on construction pricing and input on construction issues during the master planning process.

Per the timetable below, proposals are due via email by <date>

**2. Current Community (see other template)**

**a. Existing Project & location**

<Name> is located on a <acres> acre parcel at <address> in <city>, <state>.

<City> is in a <urban, suburban, rural> location in <county name> . The area is characterized by <strong, stable, declining> population and economic activity as evidenced by <stats>

The community was originally developed in <date> with additional expansions and renovations in <date>

Current service line offerings at the community include:

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  - X are short-term rehabilitation beds with X occupancy
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  - Licensed under <State> as X

The community has <no/ X> acres of undeveloped land for a possible expansion

<insert campus map>

<insert campus aerial>

The community financials include the following:

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Current strengths include the following

- (list)
- (list)
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<Name> may self-develop these plan elements, joint venture with other developers, and/or serve as a master developer and set the vision and architectural guidelines which would be followed by other developers.

Along with the selected Preconstruction Pricing Consultant / Potential Contractor, those involved in the master planning process would include:

- The community CEO and leadership team
- Select members of the Board of Directors and Planning Committee
- At various times in the process, possibly various community stakeholders including family members, potential and future residents, local community members, etc.
- Outside Consultants for some or all of the process
  - Architect/Design team
  - Local civil engineer
  - Market research
  - Finance consultant & underwriter
  - Development consultant

It is expected that the selected architect would work collaboratively with the development consultant, community leadership and the other consultants to create and implement a master planning and charrette process which would include:

- Review of current market demographic data, competition and penetration rates
- Discuss potential seed capital and current/ future borrowing capacity
- Discussion of current senior living trends, both industry and the consumer
- Visioning the future campus including in-depth discussion of desired resident/ user/ staff experience
- Initial programming and initial financial feasibility
- Site planning
- Long-term phasing and development plan and updated financial feasibility

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<Date>	Proposals due
<Date>	Notice of firms to interview
<Date>	Interview firms at the <name> campus
<Date>	Notify selected firm & send additional data package
<Date>	Selected firm will work with <Development Consultant> and other selected consultants in other disciplines (preconstruction, finance, etc.) to create the final schedule and timeline for the Charette & Master Planning kickoff
<Date>	Target for Charette & Master Planning kickoff
<Date>6	Target for Board meeting – interim progress update
<Date>	Target for Board meeting- presentation of Final Master Plan

**5. Information to Provide in Proposal**

Proposals should be emailed to <email>.

Only digital submissions are accepted.

Our ideal candidate would:

- Have extensive construction experience in our market, especially in senior living
- Be able to work collaboratively with the master planning team,
- Provide construction pricing input on solutions and feedback from a construction and constructability perspective on ideas discussed during master planning,
- Provide preliminary and final concept construction budget numbers,
- Create a preliminary construction schedule for the final master plan

Please provide the following information and in the following format and order.



**1. Name of firm and any firms with which you are partnering**

Note, we understand applicants may partner with other firms to bring expertise in all areas, please identify and provide information on the experience of any project partners

**2. Information about and history of your firm** including AIA 305 Contractor's Qualification Statement, organizational chart, bonding or subcontractor default insurance capacity, and business volume for the past three years.

**3. Related Project Experience**

- a. Provide information on projects of similar size and scope for which you have provided preconstruction and/or construction services within the last five years
- b. For each project provide the following information
  - i. Project description and location, if non-profit or for-profit
  - ii. Project scope and estimated costs
  - iii. Whether your firm also constructed the project
  - iv. Name of architect
  - v. Owner/ client name
  - vi. The assigned Project Manager & PreConstruction Estimator from your firm

**4. Form of Estimate**

- a. Please provide a sample copy of an estimate from a previous master planning process and the basis on which the estimate was created (internal or public construction cost databases, specific previous projects, etc).

**5. Project Team**

- a. List the services that would be provided by your firm and provide the names and resumes of the following individuals from your firm who would be assigned to this project, e.g. Project Manager, PreConstruction Estimator, Any others assigned

**6. Form of Agreement & Fees**

- a. Provide a form of agreement, or outline of same, including fees and estimate of reimbursable costs, deliverables and timing.
- b. Submit a fee schedule and maximum cost for your proposed services including timing of billing and any out of pocket or expense charges.
- c. Provide hourly rates or other basis of billing for additional services and what those additional services might be.
- d. List the services you will conduct in-house and those contracted. For contracted services, list preferred vendors, if any, and provide a brief description of these firms and their principals.

**7. Deliverables & Schedule**

- a. Describe the deliverables you would expect to provide as a result of this engagement.
- b. Confirm that you can undertake this work with a start date of <date> with final Board presentation <date>

**8. References**

- a. Please provide at least three references of other similar clients who we may contact.

**9. Future Services**

- a. Please provide information about other services your firm is able to provide to us beyond the scope of the master planning proposal if we should proceed into development or construction steps following the master planning process.
- b. For construction services, describe the typical arrangement with the owner (construction manager, general contractor, design-build, etc.), list the services you typically self-perform and typical fee, and which trades, if any, which you are union signatory.

**10. Other**

- a. Please provide any other information you believe is relevant to our selection process

**Request for Proposal Template**  
**Development Consultant to Coordinate &  
Serve as Feasibility Consultant for Master Planning**  
<date>

**1. Introduction**

<Community> (Name) is an existing <type of community> located in <city>, <state>

The community is undertaking a master planning process in order to build upon its current strengths as well as address current weaknesses in order to keep the community attractive to both current and the next generation of retirees.

<Name> is issuing this Request for Proposal for to identify a development consultant to coordinate the master plan activities and also serve as the feasibility consultant during the master planning process.

Per the timetable below, proposals are due via email by <date>

**2. Current Community (see other template)**

**a. Existing Project & location**

<Name> is located on a <acres> acre parcel at <address> in <city>, <state>.

<City> is in a <urban, suburban, rural> location in <county name> . The area is characterized by <strong, stable, declining> population and economic activity as evidenced by <stats>

The community was originally developed in <date> with additional expansions and renovations in <date>

Current service line offerings at the community include:

- <#> units of independent living units under a Type <A,B,C> <entry fee/rental> model
  - Unit sizes range from X to X SF
  - Pricing ranges from X to X
  - Licensed under <State> as X
  - Current occupancy is X
- <#> units of assisted living
  - Licensed under <State> as X
  - X occupancy
- <#> units of memory care assisted living
  - Licensed under <State> as X
  - X occupancy
- <#> units of as skilled nursing care of which
  - X are short-term rehabilitation beds with X occupancy
  - X are long-term skilled nursing beds with X occupancy
  - Licensed under <State> as X

The community has <no/ X> acres of undeveloped land for a possible expansion

<insert campus map>

<insert campus aerial>

The community financials include the following:

- \$X in long-term debt issued in <Date> through <Issuer>
- X Days Cash on Hand including approximately \$X in long-term investments
- X Debt Coverage Ratio

#### **b. Existing Strengths & Challenges**

Current strengths include the following

- (list)
- (list)
- (E.g. “excellent reputation for care, religious affiliation, beautiful and unique surroundings, dedicated staff, administration & Board, value and affordability, available land and, financial metrics and resources necessary to consider a redevelopment of the campus.)

Current challenges includes the following

- (list)
- (list)
- (E.g. “a dated campus with physical & function obsolescence, dated commons, long walking distances thru narrow hallways in independent living, only one dining venue, medical model assisted living, no memory care program and primarily semi-private rooms in skilled nursing.)

Additional challenges to address during master planning would be two-fold.

- (list)
- (list)
- (E.g. First, while the community is generating positive cash flow and has no debt, its cash position and debt capacity is such that any redevelopment would need to include, besides just improvements to existing units and commons, new revenue generating items such as new independent living apartments or net revenue generating healthcare components. )
- (E.g. the master planning approach must be grounded in the income and asset levels of the target population which is moderate to middle-income. )

### **3. Master Plan Vision (see other template)**

<Name> desires to undertake a master planning process to best position the campus for long-term growth and expansion.

The goal of the master planning process is to strengthen the existing campus and create a complimentary and synergistic long-term and multi-phase plan for an expanded and new campus.

The current vision for the master plan is to include some or all of the following elements

- (List vision ideas, e.g.)
  - (New or renovated independent living)
  - (New or renovated assisted living)
  - (Reconfiguration of the health center)
  - (Refresh commons)
  - (e.g. “expand existing senior living options and include other non-senior living uses in order to create a walkable intergenerational village incorporating elements of new urbanism, mixed-use design and placemaking. The vision is to create a successful project which is welcoming, diverse, walkable and has a ‘sense of place’ and does not ‘look like senior living”)

<Name> may self-develop these plan elements, joint venture with other developers, and/or serve as a master developer and set the vision and architectural guidelines which would be followed by other developers.

Along with the selected development consultant, those involved in the master planning process would include:

- The community CEO and leadership team
- Select members of the Board of Directors and Planning Committee
- At various times in the process, possibly various community stakeholders including family members, potential and future residents, local community members, etc.
- Outside Consultants for some or all of the process
  - Architect/Design team
  - Pre-Construction
  - Local civil engineer
  - Market research
  - Finance consultant & underwriter

It is expected that the selected architect would work collaboratively with the development consultant, community leadership and the other consultants to create and implement a master planning and charrette process which would include:

- Review of current market demographic data, competition and penetration rates
- Discuss potential seed capital and current/ future borrowing capacity
- Discussion of current senior living trends, both industry and the consumer
- Visioning the future campus including in-depth discussion of desired resident/ user/ staff experience
- Initial programming and initial financial feasibility
- Site planning
- Long-term phasing and development plan and updated financial feasibility

The result of the master planning process would be a Vision statement, program, site plan, preliminary construction estimates, financial model and phased development plan and schedule which integrates both the existing campus and the newly added/renovated project elements.

**4. Selection Process Timeline and Master Planning Schedule (see other template)**

<Date>	Requests for Proposals sent
<Date>	Proposals due
<Date>	Notice of firms to interview
<Date>	Interview firms at the <name> campus
<Date>	Notify selected firm & send additional data package
<Date>	Selected firm will work with <Development Consultant> and other selected consultants in other disciplines (preconstruction, finance, etc.) to create the final schedule and timeline for the Charette & Master Planning kickoff
<Date>	Target for Charette & Master Planning kickoff
<Date>6	Target for Board meeting – interim progress update
<Date>	Target for Board meeting- presentation of Final Master Plan

**5. Information to Provide in Proposal**

Proposals should be emailed to <email>.

Only digital submissions are accepted.

Our ideal candidate would have the following experience and capabilities:

- Extensive master planning and senior living experience
- Be able to work collaboratively with the master planning team
- Provide leadership and direction to the master planning process and coordinate the activities of the various consultants, including creating the overall master schedule
- Draft the various RFPs and/ or review proposals received and coordinate and lead the interviews for other consultants and assist in the final selection
- Work with the selected consultants to assemble the baseline data and draft a “Briefing Book” for distribution prior to the charette
- Be able to present an overview of current senior living trends at the charette,
- Based on past or new data, present the baseline market demand, community assessment and key issues at the charette
- Work with the team members to create the final Master Plan for board presentation including financial numbers

Please provide the following information and in the following format and order.

- 1. Name of firm and any firms with which you are partnering**
  - a. Note, we understand applicants may partner with other firms in order to bring expertise in all areas, please identify and provide information on the experience of any project partners
- 2. Information about and history of your firm** including organizational chart and business volume for the past three years.
- 3. Related Project Experience**
  - a. Provide information on projects of similar size and scope for which you provided master planning coordination or development services within the last three years.
  - b. For each project listed, note the following team members
    - i. Project description and location, if non-profit or for-profit
    - ii. Master Planning team, including architect, preconstruction, marketing & sale consultant and financial advisory
    - iii. If the market study was done by you or provide the name of the third-party provider
    - iv. Owner/ client name
    - v. The assigned personnel from your firm
- 4. Approach**
  - a. Based on your review of the role of the consultant noted above, provide a description of how you would approach this project including tools used and deliverables at each step of the process. Ideally also provide a schedule for the overall master plan process based on what you know now.
- 5. Project Team**
  - a. Name and resume of the person who would be leading this project.
- 6. Form of Agreement & Fees**
  - a. Provide a form of agreement, or outline of same, including fees and estimate of reimbursable costs, deliverables and timing.
  - b. Provide hourly rates or other basis for billing for services under the agreement or for additional services and what those additional services might be.
  - c. List the services you will conduct in-house and those contracted. For contracted services, list preferred vendors, if any, and provide a brief description of these firms and their principals.
- 7. Deliverables & Schedule**
  - a. Describe the final deliverables at the end of the master planning process you would expect to provide or that you would supervise the production off through other consultants.
  - b. Confirm that you can undertake this work with a start date of <date> with final Board presentation <date>
- 8. References**
  - a. Please provide at least two references of other similar clients who we may contact.
- 9. Future Services**
  - a. If this project was to proceed past master planning into a formal redevelopment, provide an overview of the types of services you could provide during the development of the project and the specific costs associated with these.
- 10. Other**
  - a. Please provide any other information you believe is relevant to our selection process