



# Management Advisory Services

INSPIRE. EMPOWER. ADVANCE.

**BDCONNECT.COM**





## OUR STORY

Since 1993, B&D has led 1,500+ projects at 650+ higher education institutions, helping maximize the value of campus assets and operations all across the country. Through our outcome-driven process, we are uniquely prepared to help colleges and universities transform their campuses strategically.

These activities are informed by our proprietary decision-making methodologies and guide our clients' investments in their operational assets to ensure they translate into maximum impact and benefit—both financial and non-financial—for their communities. **Our role is to empower our clients with the knowledge and decision-making framework that leads to highly successful outcomes and solutions.**

This commitment to project alignment with the institution's strategic priorities differentiates B&D's work. It is why the overwhelming majority of our engagements result in initiatives being approved, funded, and implemented on-time and on-budget. And that is why clients invite us to partner with them again and again to improve their campus outcomes.

27+

YEARS OF EXPERIENCE

650+

COLLEGE & UNIVERSITY  
CLIENTS

1,500+

HIGHER EDUCATION  
PROJECTS

100+

MANAGEMENT  
ADVISORY INITIATIVES

**“THE B&D TEAM PROVIDED A SOLID  
FRAMEWORK FOR US TO MAKE THE  
TOUGH DECISIONS AND PLAN FOR THE  
FUTURE OF AUXILIARY SERVICES.”**

**CHRIS ADNEY**

Auxiliary Services Director at Northeastern State University



Over decades of collaboration, we've come to realize that our clients' initiatives often begin with the administration's exploration of key questions such as:

“  
Are our departments and facilities operating efficiently and effectively?  
”

“  
Do I have the resources, expertise, tools, and decision-making guidance to lead and successfully implement my initiative across campus?  
”

“  
What role should third-party partnerships play in our pursuit of excellence?  
”

For what areas should we retain full responsibility and risk?  
”

“  
Do we have the right information and process to confidently make decisions about our future?  
”

*To address such daunting challenges, B&D works with each of our clients to curate the appropriate services that will most advance the university. →*

## OUR SERVICES

There are many ways B&D helps enhance our clients' financial and operational performance in alignment with institutional mission and goals. Our services often take shape in these core areas:



### MAJOR DECISION & PRIORITIZATION SUPPORT

Campus consolidation / relocation / acquisition, annual budgeting, online learning, and unique opportunities for collaborations are just a few of the major decisions facing institutions. We facilitate proven processes for colleges and universities to evaluate, make, substantiate, and socialize decisions rooted in your permanent ideals.



### BUSINESS PLANNING

Creating a roadmap to success empowers institutions to maximize the full value of a particular asset (both physical and operational) in alignment with institutional mission and goals. We lead this effort, which provides greater clarity on all aspects of the operation including revenue generation, expense management, and service quality. We work with our clients to set key performance indicators and clear approaches to measuring and verifying success.



### MANAGEMENT CONSULTING

Physical and operational assets can always perform better. The same is true of human systems; it is important to state that this is *not* about downsizing. We help by identifying streamlined systems, tools, and procedures; improving productivity / utilization; optimizing organizational structure and culture; setting and applying appropriate standards; improving stakeholder satisfaction; and evaluating system and process accelerators.



### STRATEGY DEVELOPMENT

All institutional resources must align in a unified strategy that optimizes efficiency and effectiveness in response to the institution's unique permanent ideals and market context. We are experts in guiding the development of that strategy.

## TOOLS

B&D has proven tools, methodologies, and resources that we calibrate to your university, and strategically sequence and deploy to achieve your objectives across various campus assets. The types of tools we deploy include:

- ✓ Strategic decision-making framework
- ✓ Organizational assessment (staffing structure, productivity, cultural indicators)
- ✓ Financial review and scenario modeling (cost-saving opportunities, revenue-generating opportunities)
- ✓ Facility and space utilization
- ✓ Operational assessment and modeling (asset maximization, third-party partnership opportunities, etc.)
- ✓ Contract partnership assessments and strategic solicitations



## PARTNERSHIP EVALUATION/ ENGAGEMENT

To fully evaluate the potential benefits and drawbacks of pursuing a partnership, using a decision-making framework and analysis is a must. We calibrate our approach to solve for your particular organizational need, as well as compare potential benefits with internal improvements required to drive enhanced value. Should the university pursue partnership opportunities, we empower you to confidently engage the private marketplace through a transparent and strategic solicitation and leverage our significant market presence to ensure that you get the best possible relationships and negotiate from a position of strength and knowledge.



## IMPLEMENTATION OVERSIGHT

Value is created only when plans are implemented. We supplement your existing campus resources with subject matter experts, proprietary program management methodologies, and continual decision-making support to maximize the value of your investments and keep your implementation process on track and on time.



## CHANGE MANAGEMENT

Complex projects require project and change management approaches to be aligned for maximum effectiveness. We provide a process for strategic integration of the two approaches to ensure your project achieves desired behavioral outcomes through the understanding of goals, clear communication, and ultimately the adoption of new habits, structures, and processes for sustainable and predictable success.

## ASSETS

The types of assets often included in our solutioning:



Housing



Dining



Recreation



Arenas and  
conference centers



Campus retail



Campus safety  
and security



Transportation  
and parking



Facilities management



Energy and utility  
infrastructure

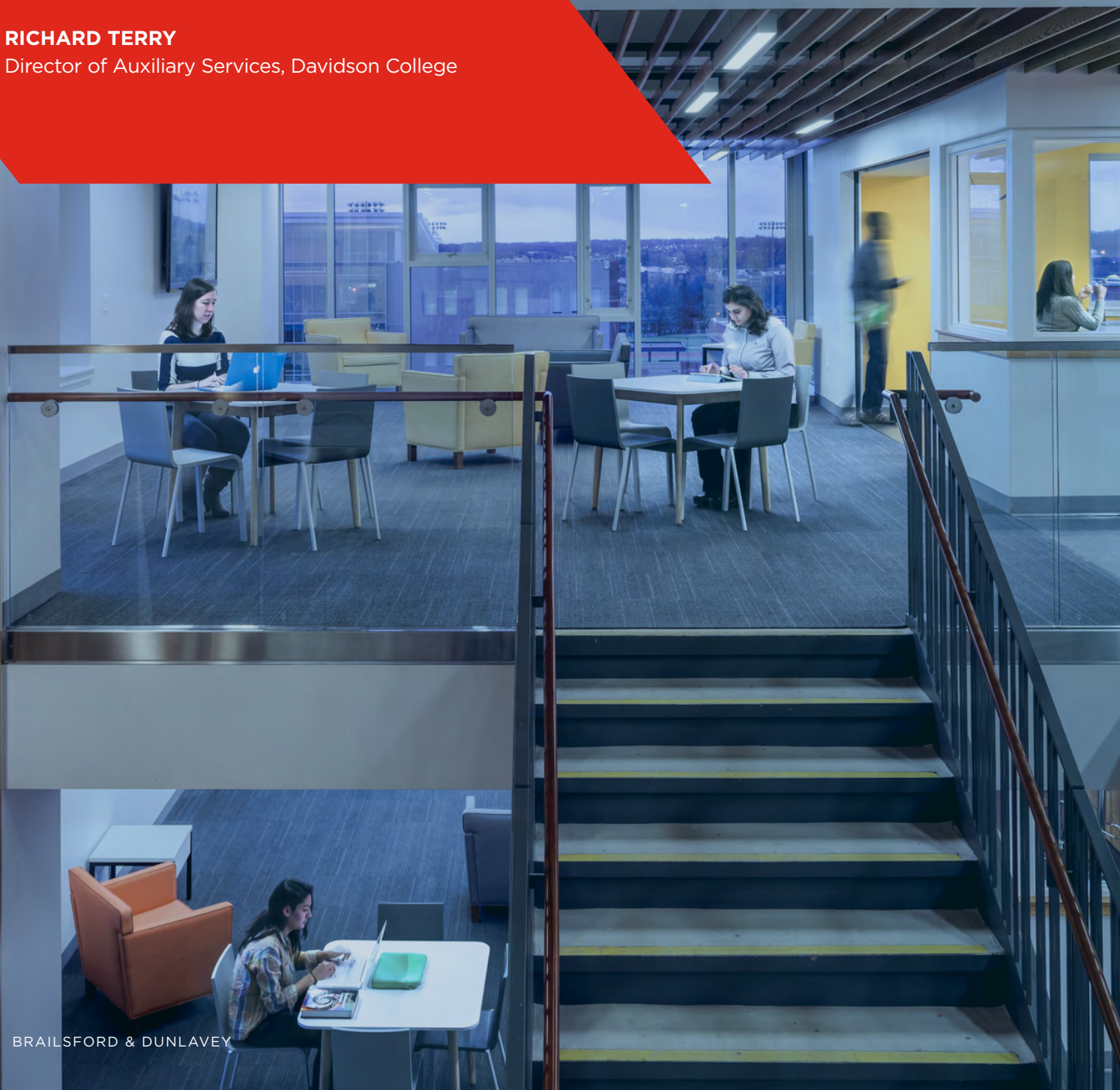


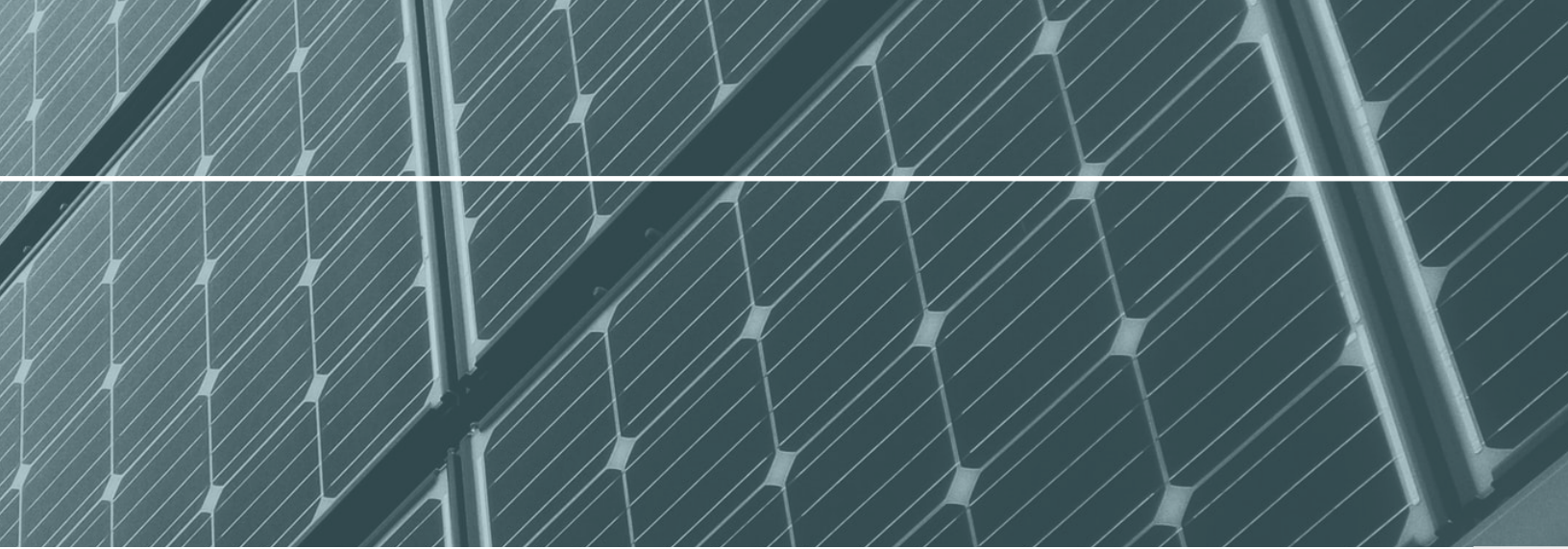
## THE VALUE WE BRING TO YOU

**“B&D LISTENED CAREFULLY TO OUR NEEDS, DID A PAINSTAKING JOB OF COLLECTING AND ANALYZING DATA, AND PROVIDED AN ASSESSMENT THAT WAS TREMENDOUSLY USEFUL FOR MY DEPARTMENT AND THE COLLEGE AT LARGE.”**

**RICHARD TERRY**

Director of Auxiliary Services, Davidson College





## We help you maximize the value of your operational, physical, and human capital assets to fulfill your institution's long-term mission and purpose.

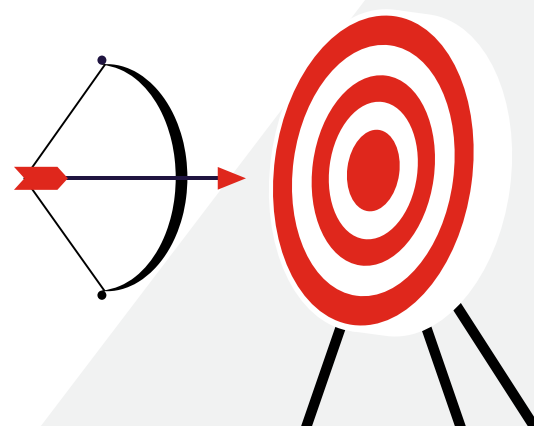
Whether your institution's mission is to advance science, empower individuals in their personal careers, contribute to social justice, or otherwise, we believe all decisions and actions must be in line with your institution's mission and goals. Every question we ask, recommendation we make, and implementable plan we create has your institution's larger strategic vision in mind, as well as the quality of your students' experience. We'll help you become not just more efficient, but more impactful.

### HOW WE DO IT

Our proprietary decision-making methodology is designed to ensure that long-term goals are not overshadowed by short-term priorities, that departmental initiatives respond directly to institutional priorities, and that schools take solid steps toward achieving their mission and purpose.

As a first step, we work with you to establish smart, strategic decision-making criteria. *People* are at the core of these conversations, as we understand and appreciate the human elements of higher ed—how it's all about the students, faculty, staff, and other stakeholders, and is not just about finding the lowest-cost solution. We then use these criteria and a collaborative process to reach recommendations that not only align with institutional goals and values, but that are implementable.

Our methodology also guarantees it is *your* needs and priorities that drive decision making, not those of any partnering entities, including us. This “agnostic” approach is complemented by our refusal to participate in any project that could present a conflict of interest.





## THE VALUE WE BRING TO YOU

### **We identify cost-saving and revenue-generating opportunities, so you can maximize the full value of your administrative/operational assets.**

In practical terms, that means evaluating and optimizing the efficacy of a unit's operating structure and business processes. The value we produce here is real and covers our costs many times over.



### HOW WE DO IT

To identify opportunities, we facilitate an open, transparent, and thorough review process. Our work happens in the context of improving program quality and service delivery, as well as clarifying each administrative / operational unit's role and responsibility in realizing the institution's broader vision for its future.

To ensure value, our recommendations are implementable. We design and sequence recommendations to empower leadership to create broad campus buy-in, and to establish a unit's capabilities to deliver positive change, creating "quick wins" where possible. Our recommendations also keep in mind how higher ed institutions are about people, and that the success or failure of any initiative will be achieved by them, and not us. Our implementation roadmap then progresses to more complex, cross-unit-collaborative actions.

We are also sensitive to the perception some may have of external advisors. Our project engagement approach addresses this directly. We take the time to understand campus dynamics and any cultural norms and sensitivities, then keep this understanding at the forefront while developing engagement activities (e.g., stakeholder interviews, focus groups, campus communications and reports, etc.).



## We are the industry leader in advising higher education clients.

Schools nationwide seek us out for our expertise and then keep working with us once they see the value of our knowledge and recommendations. Our methodologies are up to date with the latest and most innovative concepts. That is why financiers, consultants, private partners, architects, general contractors, and others come to B&D for thought leadership and data. Being the industry leader in higher education also means that when the time comes to perform peer benchmarking, our network is invaluable. We provide accurate, impactful data that helps shape your outcomes.

### HOW WE DO IT

B&D works exclusively across three mission-centric markets: higher education, K-12, and municipalities. Only those three. We believe in the expertise that results from specializing, rather than working in far-reaching, disparate sectors. We do not apply concepts from vastly different worlds, but enact programs developed and refined specifically for higher education. B&Ders also bring a deep understanding of colleges and universities because we've worked in these very places. Our team members have previously served as college and university administrators, including CFOs, senior student affairs professionals, construction managers, and architects, among others. Our internal structure and communication system ensure your institution benefits from all these areas of expertise.

Finally, we make it a priority to invest in activities and programs that make the higher education sector stronger. B&D regularly keynotes national conferences, leads webinars, and publishes dozens of articles per year. And in one subset of our work—helping schools explore and potentially navigate public-private partnerships—we are the go-to place for knowledge, through our Higher Ed P3 Resource Center and our annual report detailing findings from our higher ed P3 project database.



## CASE STUDIES

The following case studies are intended to showcase the range of engagement and value derived.

# RUTGERS UNIVERSITY

## Auxiliaries Organizational and Budget Process Restructuring

### CHALLENGE

- Budgeting process and organizational / management structure for Auxiliary Services inhibited potential for maximizing net revenue production and achieving targeted service levels

### RECOMMENDATION

- Unify management of auxiliary services units across all campuses and create new budget model allowing for consistent branding, predictable and uniform student experience, and increased operational effectiveness and efficiency

### OUTCOME

Net revenue projected to increase by **\$15.3M** over three years

Budget participation model for auxiliary units that supports stable, long-term revenue growth and broader student experience initiatives



# UNIVERSITY OF DELAWARE

## Facilities' Planning and Project Delivery ("PPD") Group Operational and Organizational Structure Assessment

### CHALLENGE

- Suboptimal organizational structure, business processes, and approach to human capital allocation limited the strategic value that the Facilities Department provided toward realizing the University's strategic and campus master plans

### RECOMMENDATION

- Redesign PPD organizational structure to align with high-volume functional activities and empower management staff with increased approval authority
- Develop comprehensive policies and procedures documentation
- Develop project prioritization criteria and governance structure
- Establishment of key performance indicators to measure organizational effectiveness

### OUTCOME

Repeatable business processes that are designed for maximum efficiency and effectiveness to promote customer transparency

Optimized staff effectiveness and empowerment through better organizational and operating structures

Staffing structure and contractors optimized for maximum flexibility and productivity

Transparent, inclusive, and objective-aligned decision-making and project prioritization processes

# NEW MEXICO STATE UNIVERSITY

## Comprehensive Auxiliaries and Facilities Public-Private Partnership (“P3”)

### CHALLENGE

- Limited realization of synergies between campus assets (physical and operational) constrained the efficiency of resource allocation and deployment, leading to inconsistent practices/policies across reporting lines that led to suboptimal student/user experiences

### RECOMMENDATION

- Identify preliminary synergies across assets
- Conduct a strategic market engagement and procurement process to identify potential partner(s) to maximize value back to the university through innovative solutions impacting revenue generation, service quality, and cost efficiency
- Implement a governance structure to manage the third-party agreement to enhance decision making, manage risk, and guide the partnership through new initiatives

### OUTCOME

Expose availability of more than **\$1B** of market investments made in campus assets

Establish long-term, third-party resources and expertise to deploy in alignment with NMSU's strategic plan



# UNIVERSITY OF MAINE SYSTEM

## System-wide Dining Operations Assessment and Strategic Solicitation

### CHALLENGE

- System-wide third-party dining agreement inhibited the desired level of campus innovation, minimized the value realized through cross-campus collaboration/communication, and limited system-level initiatives to drive maximum economic impact for the region

### RECOMMENDATION

- Conduct strategic solicitation to select an operating partner that meets each campus's unique identity while maintaining a cohesive thread through a system-wide contract and governance structure
- Support Maine's economic ecosystem by coordinating system-wide food purchases to cultivate and sustain regional agriculture industry and distribution

### OUTCOME

Student satisfaction, which began at 74% in the fall of 2016, immediately rose to **80%** by the spring of 2017, and has progressively increased to **83%** by 2019

Local food sourcing was less than 10% and has grown to **24%**, connecting students with the local agricultural community and generating positive economic impact for the state

University return has increased from operational and facility investments



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