

# PLANNING A CAPITAL PROJECT:

## 10 Steps for Getting Renovation, Additions or Expansions on the Right Track

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## 10 Steps for Getting Renovation, Additions or Expansions on the Right Track

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Project Manager

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**HOLZMAN MOSS**  
ARCHITECTURE



BRAILSFORD & DUNLAVEY

# PLANNING A CAPITAL PROJECT:

## Goals for the Session

- 10 Goals from 3 Different Perspectives
- No Two Projects Alike
- Determine what works for you
- A Menu of choices

Free can soda with orders over \$100.00

## THE BELCHING DRAGON

50 lbs. white rice with every order



<p><b>SOUPS</b></p> <p>地大蝦仁 * Dropped Egg Soup ..... 1.75              湯蝦仁 * One Ton Soup ..... 1.75              燒蝦仁 * Hot &amp; Scalding Soup ..... 2.25              保蝦仁 * Ten Ingredients Water ..... 3.25              鼓蝦仁 * Sweet and Salmonella Soup ..... 2.95              會心仁 * Chinese Fire Drill Soup ..... 2.50              開蝦仁 * Happy Bacteria Cup ..... 2.50</p> <p><b>APPETIZERS</b></p> <p>須蝦仁 * Steam-Cleaned Dumplings ..... 3.95              蘭大蝦仁 * Burn Your Tongue Flatter ..... 8.95              豆魚蝦仁 * Barbecued Bear Ribs ..... 6.30              香大蝦仁 * Scallion Cow Pancakes (for two) ..... 2.95              茄三鮮 * MSG with Orange Flavor ..... 4.95</p> <p><b>NOODLES</b></p> <p>茄蛋餅 * Cellophane Noodles with Styrofoam Peanuts ..... 5.50              刀蛋餅 * Cold Noodles in Sesame Waste ..... 3.50              香餅餅 * Some Gum Noodles ..... 8.25              椰餅餅 * No Fun Noodles ..... 4.75</p> <p><b>PORK</b></p> <p>菜鴨餅 * New Shoe Pork ..... 6.75              茄子餅 * Roasted Pork in Shriner Hat ..... 6.95              木須餅 * Recently Shampooed Pork ..... 6.95              芥蘭餅 * Andrew Diced Pork ..... 9.75              鹽豆餅 * Roast Pork Pappy Chow ..... 7.25              蒜鴨餅 * Parky Pig Cartoonese Style ..... 7.50              豆腐餅 * Pork and Mindy ..... 6.75</p>	<p><b>VEGETABLES</b></p> <p>蘭蝦仁 * Broccoli in Human Sauce ..... 5.95              鴨大蝦仁 * Shredded Documents with Peking Sauce ..... 5.25              須蝦仁 * Bean Crud with Special Rotting Fungus ..... 6.25              燒大蝦仁 * Snow Shaved with Peas ..... 7.75              菜蝦仁 * Egg Neil Young ..... 4.95              燒蝦仁 * Green Beans with Black Bean Sauce ..... 4.95              鼓蝦仁 * Black Beans with Green Bean Sauce ..... 5.95              蘭蝦仁 * Eggplant Prepared Under Mysterious Circumstances ..... 5.95              鴨蝦仁 * Baby Corn with Adoption Papers ..... 4.95              香蝦仁 * Vegetables with Tingling Horse Flavor ..... 5.50</p> <p><b>POULTRY</b></p> <p>燒大蝦仁 * San Diego Chicken with Pine Tar ..... 6.25              燒菜蝦仁 * Battering Ram Chicken ..... 6.25              燒鴨仁 * Peeking Dally Duck ..... 7.50              鴨蝦仁 * Lemon Pledge Chicken ..... 8.25              鼓蝦仁 * Amazing Talking Chicken ..... 8.75              會蝦仁 * Tongue Licked Duck ..... 7.50              蘭蝦仁 * Chickens &amp; Grief ..... 6.25              會大蝦仁 * Duck Edwing Prepared in Questionable Taste ..... 6.25              須蝦仁 * Chickens Escaping With Wings ..... 7.75              蘭大蝦仁 * Mocked Duck ..... 7.25              菜大蝦仁 * General Schwarzkopf Chicken ..... 6.75              香大蝦仁 * Goody Grinning Chicken ..... 6.75              香蔥餅 * Innocent Bystander Chicken ..... 6.25</p>	<p><b>BEEF</b></p> <p>菜鴨餅 * Air-Dropped Beef ..... 6.85              茄子餅 * Double Chin Beef ..... 6.85              木須餅 * Beef with More Beef ..... 7.75              芥蘭餅 * Carriage of Beef ..... 6.85              香鴨餅 * Sizzling Wanton Beef ..... 6.85              蒜鴨餅 * Beef and Dried Pepper Spilled on Lap ..... 9.25              大菜餅 * Beef with Bad News ..... 8.85              菜子餅 * Great Barrier Reef ..... 6.85              雙保餅 * What's Your Beef ..... 7.25</p> <p><b>SEAFOOD</b></p> <p>豆魚餅 * Squashed Eel Delight ..... 8.50              蒜鴨餅 * Shrimp with Alibi ..... 8.25              豆層餅 * Young Dead Fish ..... 9.25              菜蝦餅 * Crappy Fish with Discarded Needle ..... 9.95              蝦香餅 * Prawns in L.L. Bean Sauce ..... 7.50              蝦蝦餅 * Aromatic Octopus On Wheels ..... 10.50              蝦鴨餅 * Force Fed Shrimp ..... 17.75              大菜餅 * Flounder with Water Pistol ..... 8.95</p> <p><b>DESSERTS</b></p> <p>木須餅 * Unfortunate Cookies ..... 2.50              芥蘭餅 * Sweet Fried Roloids ..... 3.95              炒豆餅 * Ice Cream with Garlic Sauce ..... 2.75              蒜鴨餅 * Boneless Pudding ..... 3.50              豆腐餅 * Chicken Almond Ring Ding ..... 3.95</p>	<p><b>CHEF'S SPECIALS</b></p> <p>聖大蝦仁 * Sesame Street Duck ..... 11.75              菜蝦仁 * Choice chunks of undernourished food pebbled with waterchestnuts and stir-fried in a sizzling wok by popular Muppet.</p> <p>果蝦仁 * Overpriced Happy Family ..... \$4.95              Scallops, crabmeat and psychotropic mushrooms sautéed with fresh chef's thumbs and served on a Sealy Posturpedic.</p> <p>蝦蝦仁 * Tiananmen Square Beef ..... 17.75              Oppressed young beef, severely battered, crushed with bamboo shoots and brutally smothered as you watch from your table on a big screen.</p> <p>蘭蝦仁 * Health Inspector's Seafood Delight ..... FREE!              Fresh lobster, shrimp and prawns expertly prepared in the clean Mexican restaurant down the block, brought in through our back door and served with a crisp fifty dollar bill rolled in a napkin. (Must be ordered in advance.)</p> <p style="text-align: right; font-size: 8px;">* May Not Be Edible</p>
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Walter will change shirt at your request.



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A MAD POSTER

# 10 STEPS FROM THE . . .

# UNION DIRECTOR'S VIEWPOINT

Mitch Kilcrease

Director OSU Student Union  
Oklahoma State University  
Stillwater, Oklahoma

**HOLZMAN MOSS**  
ARCHITECTURE



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# UNION DIRECTOR'S VIEWPOINT

## #1 - Define the Need

- Assess the physical need of your facility and your ability to support the expectation of the campus
- Meet with key campus and community leaders to assess their perceptions about your organization



# UNION DIRECTOR'S VIEWPOINT

## #2 - Build & Educate A Cohesive Stakeholder Team

- Identify and engage key stake holders
- Make your organization as transparent as possible
- Educate your team about your organization
  - What are your values
  - How are you funded
  - What does the funding support
  - How does your organization support the educational mission of the University.

# UNION DIRECTOR'S VIEWPOINT

## #3 - Create an Inclusive Process

- Use the process to gather information as well as to educate groups about the need
- No one should be surprised about the end product

# UNION DIRECTOR'S VIEWPOINT

## #4 - Understand the Political Climate of Your Campus & Community

- Do an environmental scan of those issues that are impacting the administration, students, faculty, alumni, community and state leaders
- Don't Hand Your Campus Leadership a Project That They Can Not Support
- Identify key campus decision makers
- Involve them early on in the process and keep them well informed during all phases of the process



# UNION DIRECTOR'S VIEWPOINT

## #5 - *Actively Involve Your Students*

- Put them in key leadership roles
- Give them tools and resources to educate others
- Trust them
- Don't underestimate their power to grasp complex issues



# UNION DIRECTOR'S VIEWPOINT

## #6 - Build Relationships With Unlikely Advocates

- Involve your critics...get them on the inside of the initiative
- Allow concerns and criticisms to be aired
- Engage the under represented and add voice to their needs

# UNION DIRECTOR'S VIEWPOINT

## #7 - Hire Consultants Who Understand the Complexity of our World



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# UNION DIRECTOR'S VIEWPOINT

## #8-Prepare Those Around You For What They Are Getting Into

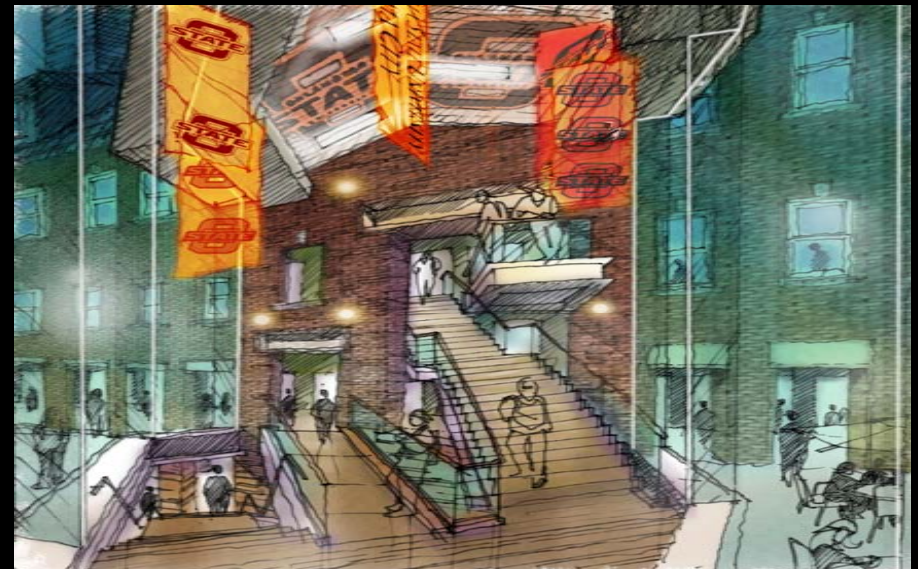
- Your staff
- Your supervisor
- Your family and friends



# UNION DIRECTOR'S VIEWPOINT

## #9 - Assume Nothing and Prepare for Everything

- Assume no one knows anything about your organization and what your needs are
- No matter how well you prepare, something will come along and force you off your game plan



# 10 STEPS FROM THE . . .

## Facility Planner's Viewpoint

**Bart A. Hall**



*Catalysts for  
Building  
Community*

**Project Manager**

**Brailsford & Dunlavey**

1140 Connecticut Avenue, NW – Ste 400

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# Capital Planning as an Educational Process

## Needs Assessment

- 1) Strategic Asset Value Determination
- 2) Existing Conditions Assessment
- 3) Benchmarking / Comparative Assessment

## Learning Focus

- 1) Consultants
- 2) "Institution"
- 3) Students
- 4) Staff

## Demand Assessment

- 4) Focus Groups & Interviews
- 5) Campus Community Survey
- 6) Market Capacity (on & off campus)

- 1) "Institution"
- 2) Staff
- 3) Students
- 4) Consultants

## **Demand-based Programming (7)**

**ALL**

## Financial Modeling

- 8) Project Cost Implications
- 9) Operating Cost Implications
- 10) Resource Assessment & Reconciliation

**ALL**

# Strategic Drivers

- Leadership Development
- Student Employment
- Leisure Activities / Stress Mitigation
- Out-of-Classroom Experience
- Academic Activities
- Recruitment / Retention
- Central Gathering Place
- Faculty / Staff / Student Interaction
- Campus Life Program Model
- Campus Master Plan Integration
- Community Relations
- One Stop Shopping/Student Services
- Revenue Management
- Expense Management
- Alumni / Donor Involvement
- Balance Sheet Utilization

Educational Outcomes

Enrollment Management

Campus Community

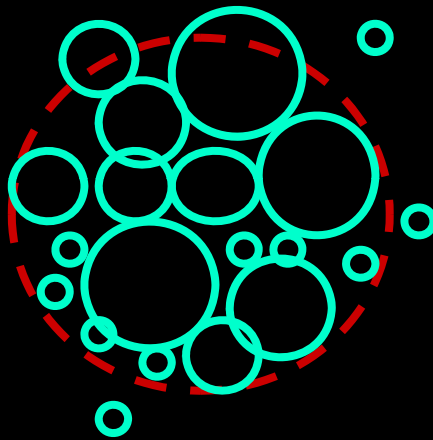
Functionality

Financial Performance



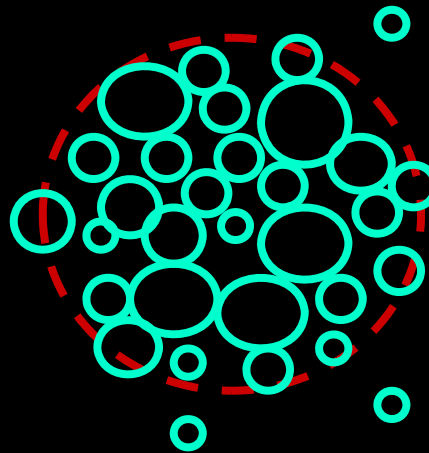
# Campus Life Program Models

A Common Experience



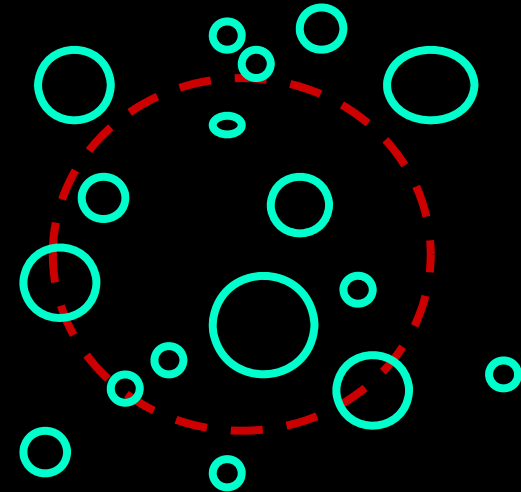
Focus on Several Special (Larger) Programs/Events

Something for Everyone



Focus on More Diverse (Smaller) Programs/Events

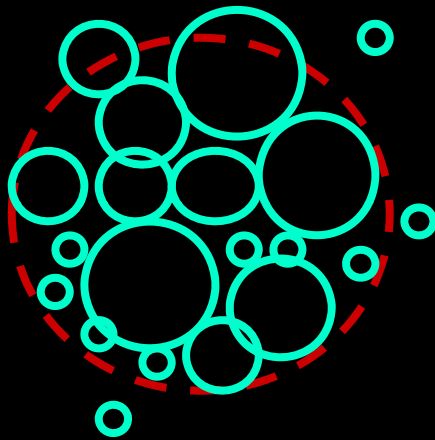
Independent Endeavors



Students Engaged in Events of Their Own Choosing

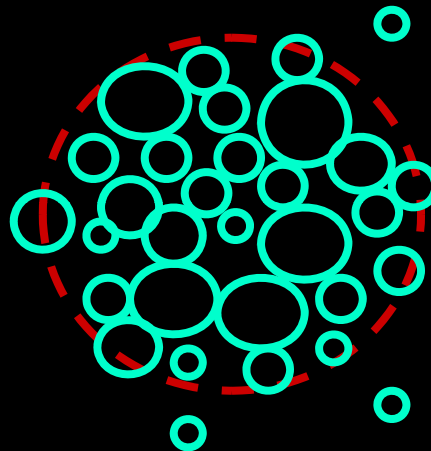
# Programs → Facility Characteristics

A Common Experience



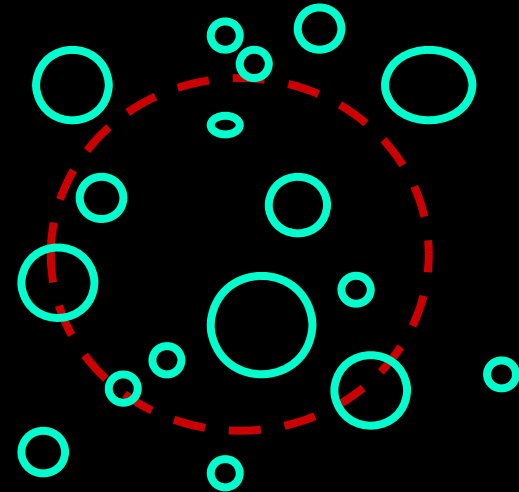
Consolidated & Centralized Campus Life Center

Something for Everyone



Centralized Campus Life Center

Independent Endeavors



Limited Campus Life Center

# Needs Assessment

## ■ Existing Conditions Analysis

Facilities – Both “Style” & Infrastructure

Enrollment & Demographics

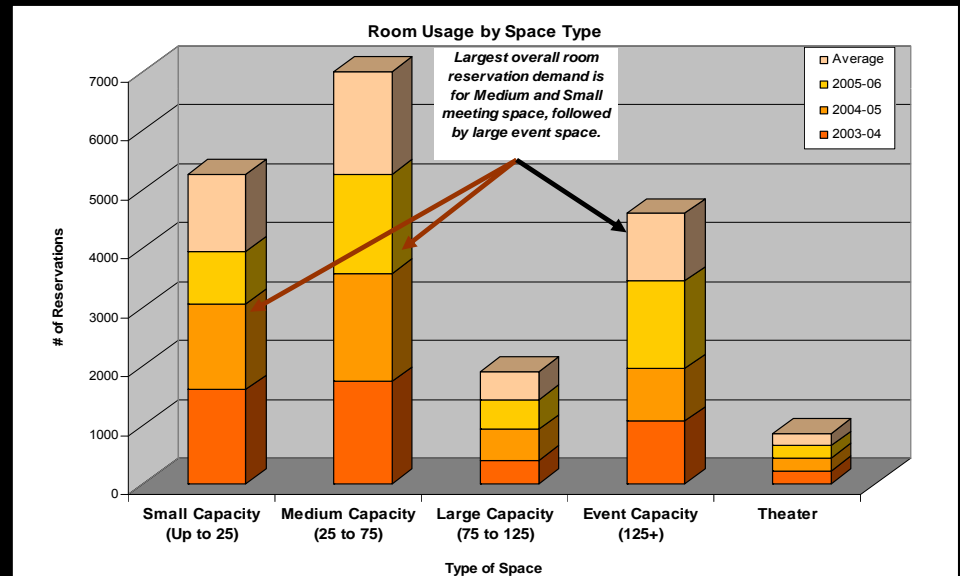
Services & Amenities

## ■ Benchmarking / Competitive Context

Peer vs. Aspirational Comparisons

General Metrics

- Traffic Volume
- Meeting / Event Scheduling
- Square Feet per Student



# Program Benchmarking

Functional Areas	All Unions (n=75) Ave Enrollment = 17,855			Select Unions (n=14) Ave Enrollment = 26,524			OSU Student Union Enrollment = 21,402			Select Unions to OSU Variance	
	ASF	Average	ASF/Stdnt	ASF	Average	ASF/Stdnt	ASF	Average	ASF/Stdnt	ASF/Stdnt	Grp ASF
Group 1: Food Service	26,965	24.2%	1.5	33,523	21.3%	1.9	27,872	10.8%	1.6	(0.3)	(5,651)
Group 2: Ballroom Facilities	10,703	9.6%	0.6	15,161	9.6%	0.8	9,790	3.8%	0.5	(0.3)	(5,371)
Group 3: Conference/Meeting Rooms	10,523	9.4%	0.6	14,673	9.3%	0.8	18,305	7.1%	1.0	0.2	3,632
Group 4: Bookstore	12,134	10.9%	0.7	17,814	11.3%	1.0	24,360	9.4%	1.4	0.4	6,546
Group 5: Additional Retail Services	5,535	5.0%	0.3	8,115	5.1%	0.5	6,766	2.6%	0.4	(0.1)	(1,349)
Group 6: Theater/Auditorium	5,370	4.8%	0.3	7,745	4.9%	0.4	7,130	2.8%	0.4	(0.0)	(615)
Group 7: Recreation/Entertainment	6,608	5.9%	0.4	8,361	5.3%	0.5	3,407	1.3%	0.2	(0.3)	(4,954)
Group 8: Lounge Space	6,747	6.1%	0.4	8,305	5.3%	0.5	13,509	5.2%	0.8	0.3	5,204
Group 9: Academic Related	2,069	1.9%	0.1	2,698	1.7%	0.2	2,659	1.0%	0.1	(0.0)	(39)
Group 10: Student Organizations	8,888	8.0%	0.5	12,364	7.8%	0.7	14,500	5.6%	0.8	0.1	2,136
Group 11: Administrative Offices	9,485	8.5%	0.5	11,734	7.4%	0.7	92,691	35.8%	5.2	4.5	80,957
Group 12: Multicultural Centers	2,010	1.8%	0.1	2,285	1.4%	0.1	1,942	0.7%	0.1	(0.0)	(343)
Group 13: Special/Misc. Components	5,806	5.2%	0.3	14,841	9.4%	0.8	36,222	14.0%	2.0	1.2	21,381
Total Assignable Sq. Footage	111,427			149,654			259,153				109,499
Total Gross Sq. Footage	174,946			233,876			498,371				264,495
Gross/Net Ratio (Grossing Factor)	1.53			1.50			1.48				(0.02)
Efficiency Factor (% ASF/GSF)	65%			67%			52%				-15.30%

\* "Select" data from 14 institutions in B&D / WTW database with comparable mission / enrollment

# Demand Assessment

## Focus Groups & Interviews

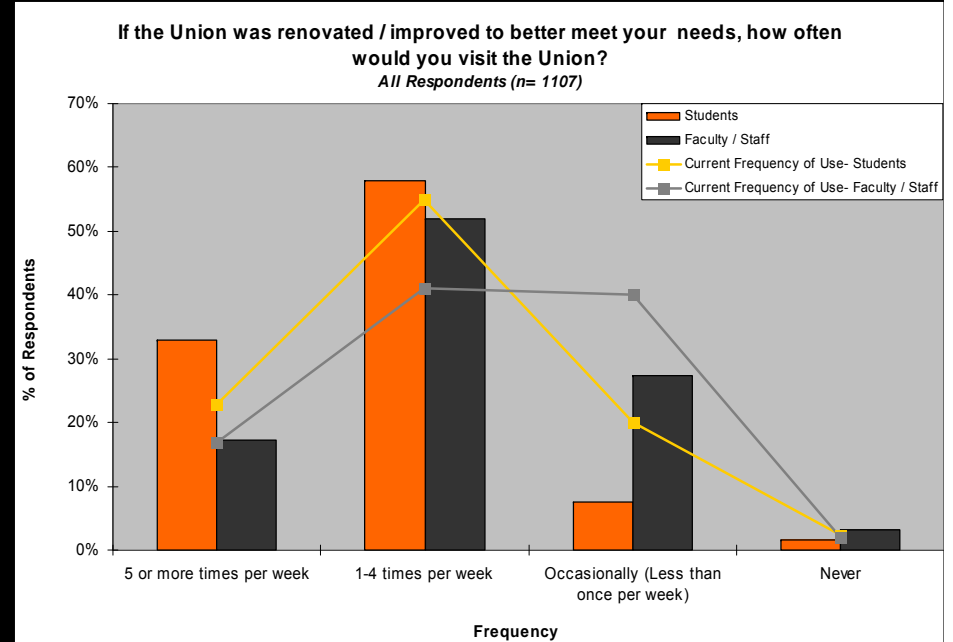
- Perceptions of Facility / Services
- Impact of Programming
- Identity of Institutional “Comrades & Competitors”
- Explore Fee Sensitivity
- Opportunity to Share Reality & Start Educational Effort



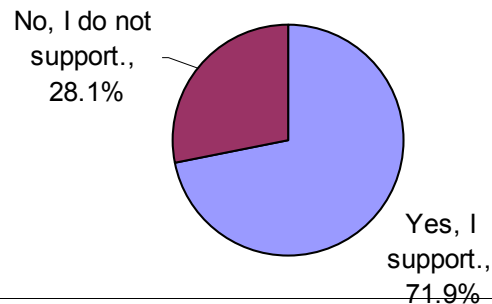
# Demand Assessment

## Campus Community Survey

- Facility Usage
- Facility Demand
- Amenity & Svc Demand
- Fee Tolerance



Would you support an additional fee for sustainability?



Do you support an additional fee for sustainability?

Yes, I support.  
No, I do not support.

**TOTAL**

**71.9%**  
**28.1%**

Support original \$115 Fee

Yes

92%

No

37%

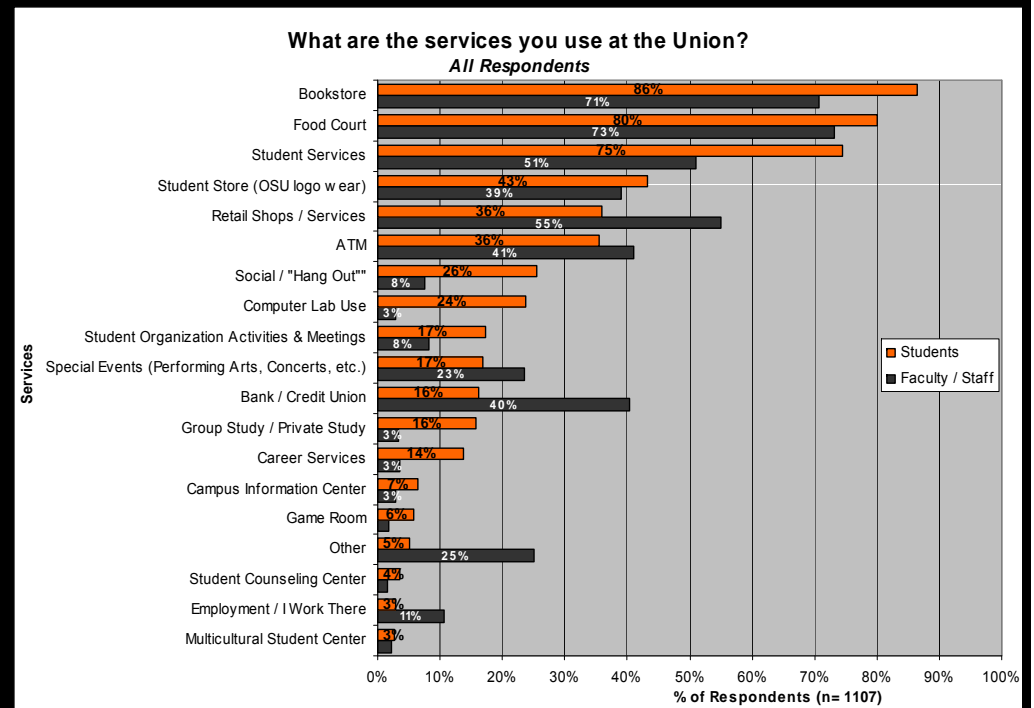
8%

63%

# Demand Assessment

## Market Capacity (on & off campus)

- On Campus Factors
  - Coffee Shops in Libraries
  - Convenience Stores
  - Other Multi-Use Facilities (i.e. Rec Ctr “Lounges”)
  - Activity & Program Participation
- Off Campus Factors
  - Food Service
  - Bookstores
  - Other Retail & Social Activity Outlets



# Demand-based Programming

- Unique Process Driven By Quantitative Data

OKLAHOMA STATE UNIVERSITY

27-Dec-06

Student Union Strategic Consulting Services

ACTIVITY PRIORITY ANALYSIS - BY DEPTH AND BREADTH OF DEMAND

## All Responses

	Activity	Depth	Breadth	Priority	Depth + Breadth	% of Change (Depth + Breadth)
1	Food court - lunch	36.7%	82.3%	first	119.0%	
2	Coffee house / entertainment venue	22.5%	67.8%	first	90.3%	28.6%
3	Convenience market / store (some produce, dairy case, cereal, canned goods, etc.)	17.4%	65.0%	first	82.5%	7.9%
4	Food court - breakfast	14.7%	54.4%	first	69.1%	13.4%
5	Quiet / study lounge	13.1%	35.6%	second	48.7%	20.4%
6	Email stations (stations provided throughout the building)	12.7%	35.0%	second	47.7%	1.0%
7	Food court - dinner	12.4%	46.3%	second	58.7%	-11.0%
8	Informal / social lounge	9.2%	38.7%	second	47.9%	10.8%
9	Evening / nightlife entertainment venue (dance club, live entertainment, and / or multimedia zone)	8.8%	51.9%	second	60.7%	-12.8%
10	Game room (pool tables, ping pong, video games)	5.8%	28.1%	third	33.9%	26.8%
11	Small group study rooms (4-6 people)	5.1%	32.5%	third	37.7%	-3.8%
12	Formal lounge	5.0%	30.1%	third	35.0%	2.6%

Note:

A balanced approach to activity prioritization considers the implications of both depth and breadth of demand. In this analysis, breadth of demand can be used to reorder activities within their priority categories based on depth.



# Demand-based Programming

- Methodology Tests “Lifestyle” & “Occasional” Usage
- Produces University’s “Ideal” Union Program
- Used to **Guide** Facility Recommendations, along with qualitative & other quantitative data

Activity		Priority Category	Peak Accommodation	Space Type	Peak Demand	Space Allocation Based on Prioritization of Demand
1	Food court - Lunch	first	75% to 85%	Sq. Ft.	34,870	26,200 to 29,600
2	Coffee House / entertainment venue	first	75% to 85%	Sq. Ft.	3,511	2,600 to 3,000
3	Convenience Market / store (some produce, dairy case, cereal, canned goods, etc.)	first	75% to 85%	Sq. Ft.	2,400	1,800 to 2,000
4	Food court - Breakfast	first	75% to 85%	Sq. Ft.	9,770	7,300 to 8,300
5	Quiet / study lounge	second	55% to 65%	Sq. Ft.	4,340	2,400 to 2,800
6	Email Stations (stations provided throughout the building)	second	55% to 65%	Stations	80	44 to 52
7	Food court - Dinner	second	55% to 65%	Sq. Ft.	8,600	4,700 to 5,600
8	Informal / social lounge	second	55% to 65%	Sq. Ft.	2,330	1,300 to 1,500
9	Evening / nightlife entertainment venue (dance club, live entertainment, and / or multim)	second	55% to 65%	Sq. Ft.	9,330	5,100 to 6,100
10	Game Room (pool tables, ping pong, video games)	third	40% to 50%	Sq. Ft.	3,030	1,200 to 1,500
11	Small group study rooms (4-6 people)	third	40% to 50%	Sq. Ft.	2,760	1,100 to 1,400
12	Formal lounge	third	40% to 50%	Sq. Ft.	2,020	800 to 1,000
1	COMBINED 1: Coffeehouse / Evening - Nightlife Entertainment Venue				12,841	7,700 to 9,100
2	COMBINED 2: Lounge Space - Informal / Quiet / Formal				8,690	5,900 to 5,300

# Detailed Programming

- Project Objectives
- Design Philosophy
- Location & Site Requirements
- Outline Program
- Development Budget
- Adjacencies & Functional Relationships
- Detailed Space Requirements – Room Data Sheets
- Outline Specifications

# Financial Modeling & Feasibility

## Test Financial Feasibility of Demand Models

- Revenues
- Operating Expenses
- Debt Structuring

# Financial Modeling & Feasibility

## Revenue & Expense Analysis – A Risk Mitigation Plan

- *Knowing your risks & options*
  - A description of short and long-term operational strategies to minimize risk, supplemental revenue opportunities, and cash management strategies.
- *Risks*
  - Increased Competition
  - Decreased Enrollment
  - Increased Operating Cost
- *Options*
  - Target new markets
  - Reserve fund for improvements

# Financial Modeling & Feasibility

## Financial Analysis – Project Cost & Impact Scenario

### DEBT ASSUMPTIONS

Amount of Issued Debt = \$62 Million  
Annual Debt Service Payment = \$4.13 Million  
Debt Capacity Based on Stabilized 1st Year  
Debt Coverage Ratio = 1.25  
Interest Rate = 5.25%  
Term = 30 Years

### REVENUE ASSUMPTIONS

Existing SU Student Fee = \$ 1.80 per SCH  
New SU Student Fee per Term = \$ 9.20 per SCH  
New Total SU Portion of Std. Fac. Fee = \$ 11.00 per SCH  
Total Student Fee Per Year (15 hrs UG) @ Opening = \$ 180  
Building Opening in FY 2012

### FACILITY ASSUMPTIONS

Total Gross Sq. Ft. = 296880 G.S.F.  
Expansion Gross Sq. Ft. = 252380 G.S.F.  
Total Sq. Ft. Under SU Mgmt = 365312 G.S.F.  
Operating Costs Per SF = 16.50 Per G.S.F.

### EQUITY ASSUMPTIONS

SU Reserves for Capital Contribution	\$1,157,000
Early Fee Collection	\$7,521,000
Institutional Contribution	\$5,000,000
Fundraising Contribution	\$10,000,000
Total Equity	\$23,678,000

Year 1 Debt Capacity	=	\$63,060,000
Project Equity	=	\$23,678,000
Total Funding Capacity	=	\$86,738,000
Total Student Center Project Cost	=	\$85,422,000
Surplus (if -, then Fundraising Required)	=	\$1,316,000

# Financial Modeling & Feasibility

## Financial Analysis – *Phased Fee Impact*

	Existing Fee / semester @\$1.80 SCH	Existing Fee / Year	4th Year / 2011-12				
			New Fee / SCH	New Fee / semester	Total Fee / semester	% Δ Total Fee/ semester	Total Fee / Year
<b>Undergraduate Students</b>							
Full-time (15 hours)	\$27.00	\$54.00	\$9.20	\$63.00	\$90.00	21%	\$180.00
Part-time (6 hours)	\$10.80	\$21.60	\$9.20	\$25.20	\$36.00	21%	\$72.00
<b>Graduate Students</b>							
Full-time (9 hours)	\$16.20	\$32.40	\$9.20	\$37.80	\$54.00	21%	\$108.00
Part-time (3 hours)	\$5.40	\$10.80	\$9.20	\$12.60	\$18.00	21%	\$36.00

# Financial Modeling & Feasibility

## Financial Analysis – Debt Capacity Sensitivity Analyses

Interest Rates vs. Debt Term

	20	22	24	25	28	30	32
4.50%	\$56.92	\$60.32	\$63.43	\$64.89	\$68.89	\$71.28	\$73.47
4.75%	\$55.71	\$58.94	\$61.88	\$63.25	\$67.00	\$69.23	\$71.26
5.00%	\$54.53	\$57.60	\$60.38	\$61.68	\$65.19	\$67.27	\$69.15
5.25%	\$53.40	\$56.31	\$58.94	\$60.16	\$63.46	\$65.39	\$67.14
5.50%	\$52.29	\$55.06	\$57.55	\$58.70	\$61.80	\$63.60	\$65.22
5.75%	\$51.23	\$53.86	\$56.21	\$57.29	\$60.20	\$61.88	\$63.39
6.00%	\$50.19	\$52.69	\$54.92	\$55.94	\$58.67	\$60.23	\$61.63
6.25%	\$49.19	\$51.57	\$53.67	\$54.64	\$57.19	\$58.66	\$59.95
6.50%	\$48.22	\$50.48	\$52.47	\$53.38	\$55.78	\$57.14	\$58.35
6.75%	\$47.27	\$49.42	\$51.31	\$52.17	\$54.42	\$55.69	\$56.81
7.00%	\$46.36	\$48.40	\$50.19	\$51.00	\$53.11	\$54.30	\$55.34
7.25%	\$45.47	\$47.42	\$49.11	\$49.87	\$51.85	\$52.97	\$53.93

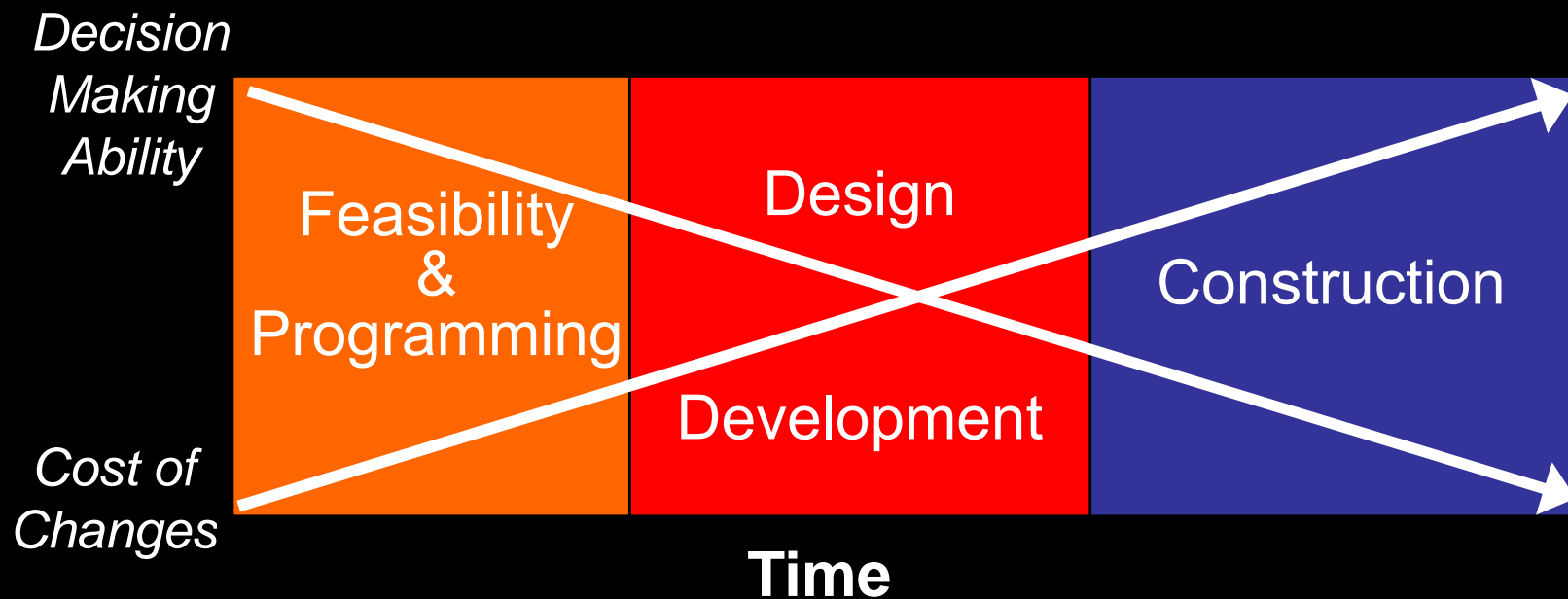
Interest Rates vs. Debt Coverage Ratio

	1.0	1.05	1.10	1.15	1.20	1.25	1.30
4.50%	\$89.10	\$84.86	\$81.00	\$77.48	\$74.25	\$71.28	\$68.54
4.75%	\$86.54	\$82.42	\$78.67	\$75.25	\$72.11	\$69.23	\$66.57
5.00%	\$84.09	\$80.08	\$76.44	\$73.12	\$70.07	\$67.27	\$64.68
5.25%	\$81.74	\$77.85	\$74.31	\$71.08	\$68.12	\$65.39	\$62.88
5.50%	\$79.50	\$75.71	\$72.27	\$69.13	\$66.25	\$63.60	\$61.15
5.75%	\$77.35	\$73.67	\$70.32	\$67.26	\$64.46	\$61.88	\$59.50
6.00%	\$75.29	\$71.71	\$68.45	\$65.47	\$62.74	\$60.23	\$57.92
6.50%	\$71.43	\$68.03	\$64.94	\$62.11	\$59.53	\$57.14	\$54.95
6.75%	\$69.62	\$66.30	\$63.29	\$60.54	\$58.01	\$55.69	\$53.55
7.00%	\$67.88	\$64.65	\$61.71	\$59.02	\$56.56	\$54.30	\$52.21
7.25%	\$66.21	\$63.05	\$60.19	\$57.57	\$55.17	\$52.97	\$50.93
7.50%	\$64.60	\$61.53	\$58.73	\$56.18	\$53.84	\$51.68	\$49.69

# Financial Modeling & Feasibility

## Decision - Implications

- Time = \$...With escalations of 6% - 8% annually!
- Consider “Pre-Design Services” \$ in relation
- to total Project Cost





# 10 STEPS FROM THE . . .

# ARCHITECT'S VIEWPOINT

Brad Lukanic, AIA, LEED AP

Architect / Project Manager  
Holzman Moss Architecture  
New York, New York

**HOLZMAN MOSS**  
**ARCHITECTURE**



BRAILSFORD & DUNLAVEY

# ARCHITECT'S VIEWPOINT

## #1 - DETERMINE THE OBJECTIVES AT THE ONSET

- Define 'your' Direction  
No two places are the same
- Vision (Union / Institution)
- *"THE BIG PICTURE"*
- What are the **'GOALS'**
- It is ok to refine goals during the process.



# ARCHITECT'S VIEWPOINT

## #1 - DETERMINE THE OBJECTIVES AT THE ONSET

- Cramped Space  
*Using Spaces in Unique Ways*
- Poor Food Options
- Need More Seating for Dining
- Reduced Student Visitation  
*Students going elsewhere*
- Inadequate Facilities & Quality of Service
- Student Life Facilities are often compared to an office building



# ARCHITECT'S VIEWPOINT

## #1 - DETERMINE THE OBJECTIVES AT THE ONSET

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# OKLAHOMA STATE UNIVERSITY

## #1 - DETERMINE THE OBJECTIVES AT THE ONSET

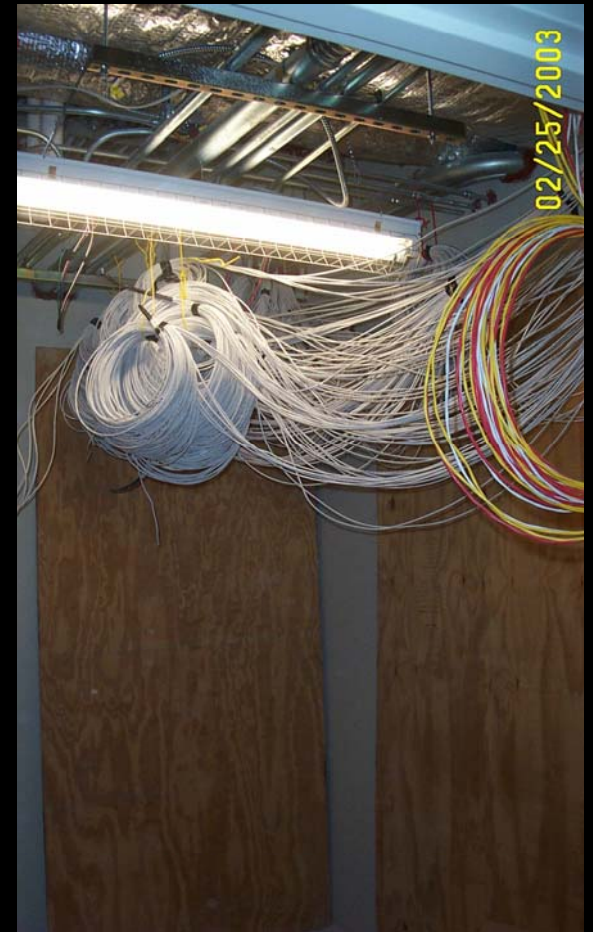
- Improve student access to Campus Life facilities
- Improve quality of Dining Services and operations
- Enhance and improve functional and financial operations of Bookstore
- Evaluate current Student Union Business model and develop strategies to sustain the economic engine in the future
- Ensure the role of the Union on the campus embraces the tradition of the past and looks forward to the future as a valuable contributor to Campus Life.
- Improve aging building and its mechanical systems



# ARCHITECT'S VIEWPOINT

## #2 EXAMINE THE EXISTING FACILITY & CONDITIONS

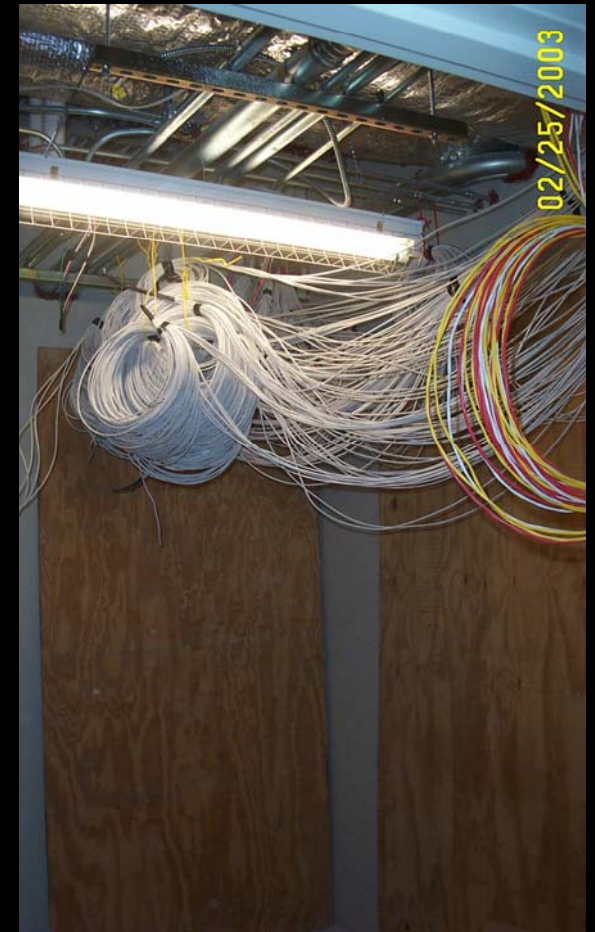
### AGING BUILDINGS



# ARCHITECT'S VIEWPOINT

## #2 EXAMINE THE EXISTING FACILITY & CONDITIONS

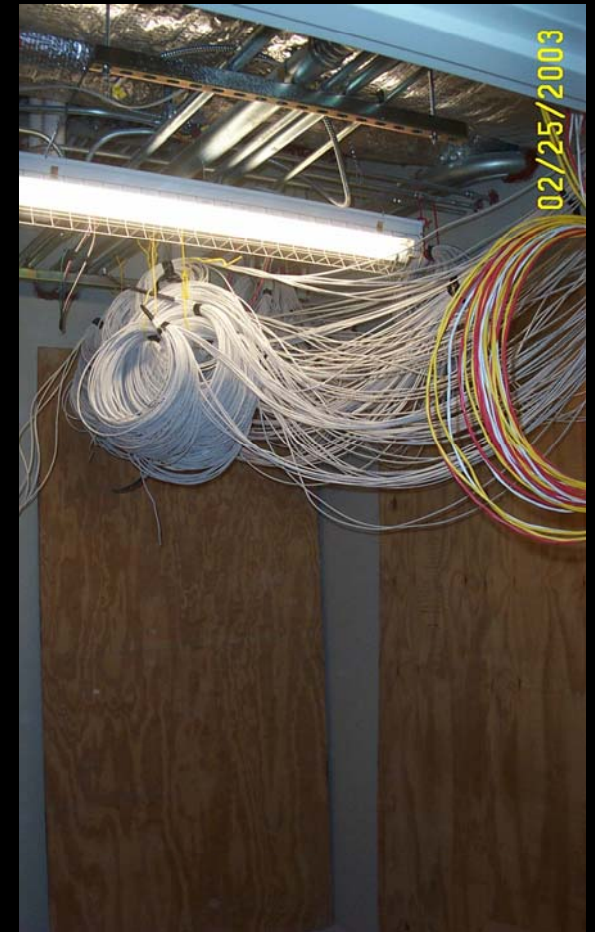
### CRAMPED SPACE



# ARCHITECT'S VIEWPOINT

## #2 EXAMINE THE EXISTING FACILITY & CONDITIONS

### NEW TECHNOLOGY



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# ARCHITECT'S VIEWPOINT

## #2 EXAMINE THE EXISTING FACILITY & CONDITIONS

- Existing Conditions Analysis  
Operational / Physical Environment
- Plan for the Future  
(The 10/15/20 Rule)
- Develop a Building Program
- What's Missing from your Union
- What have you always wanted to do.



# ARCHITECT'S VIEWPOINT

## #3 EXPLORE MULTIPLE OPTIONS AND STRATEGIES IN THE BEGINNING

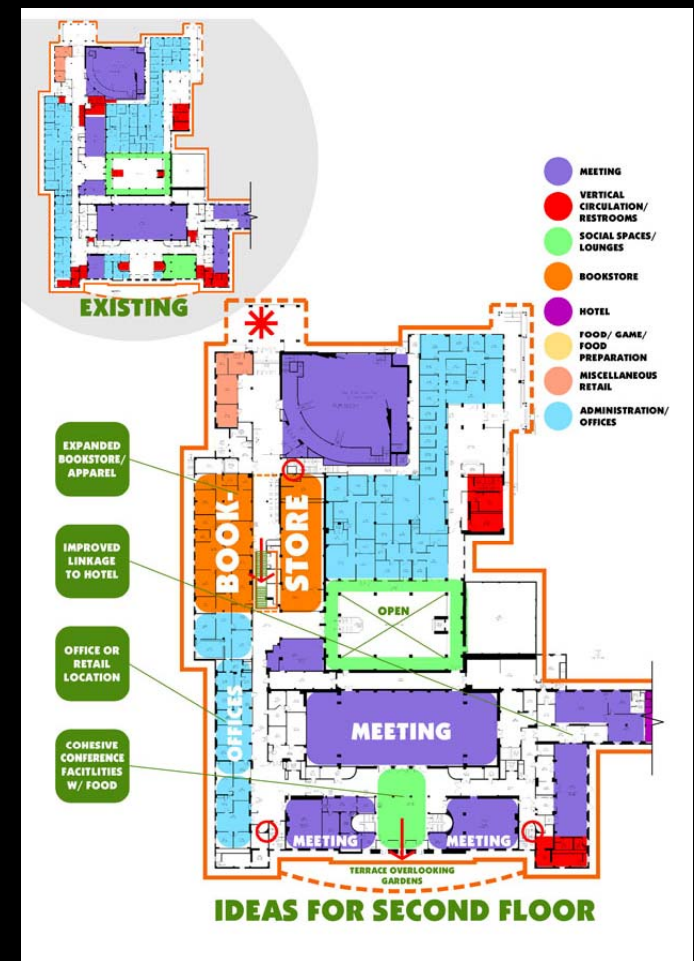
- "Measure Twice and Cut Once"
- Testing the Options
- Don't Short Change the process



# ARCHITECT'S VIEWPOINT

## #3 EXPLORE MULTIPLE OPTIONS AND STRATEGIES IN THE BEGINNING

- Buildings Evaluations and Context
- Establish Priorities for Building Improvements
- Establish Priorities for Site Development
- Establish Entrance Locations
- Address Parking/Pedestrian Traffic
- Determine Phasing Options
- Develop Project Cost Estimates



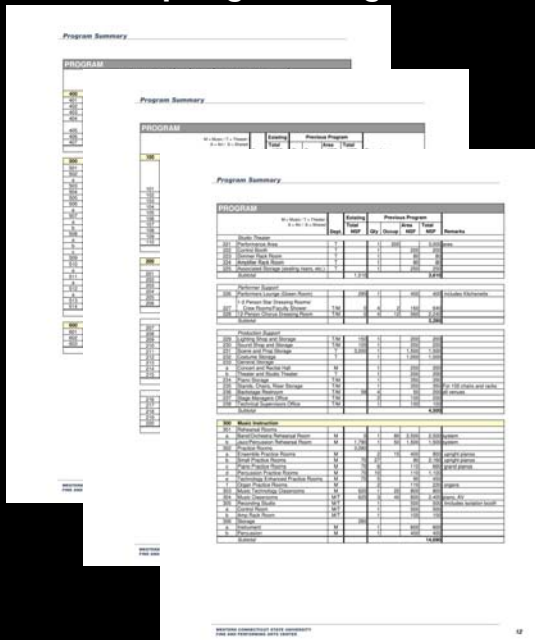
Existing Building Analysis

# ARCHITECT'S VIEWPOINT

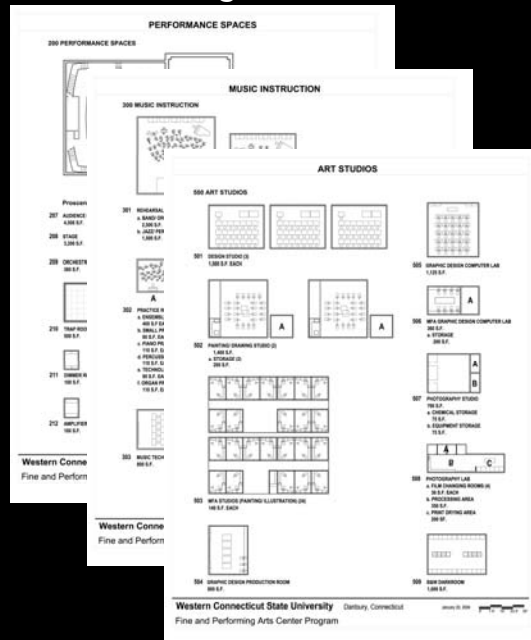
## #4 MEASURE YOUR NEEDS AGAINST ALL THE WANTS

- Keep it in Check
- Prioritize At The Beginning
- Organize, Organize, Organize

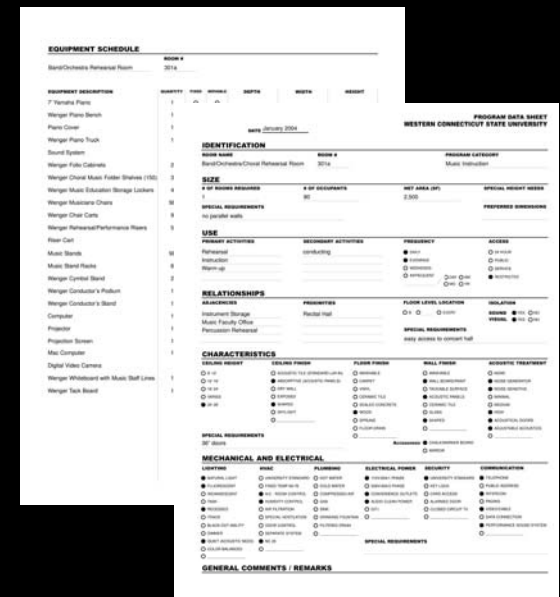
### Developing a Program



### Room Diagrams



### Room Characteristics



# ARCHITECT'S VIEWPOINT

## #5 - IS IT UNDERSTANDABLE TO THOSE AROUND YOU?

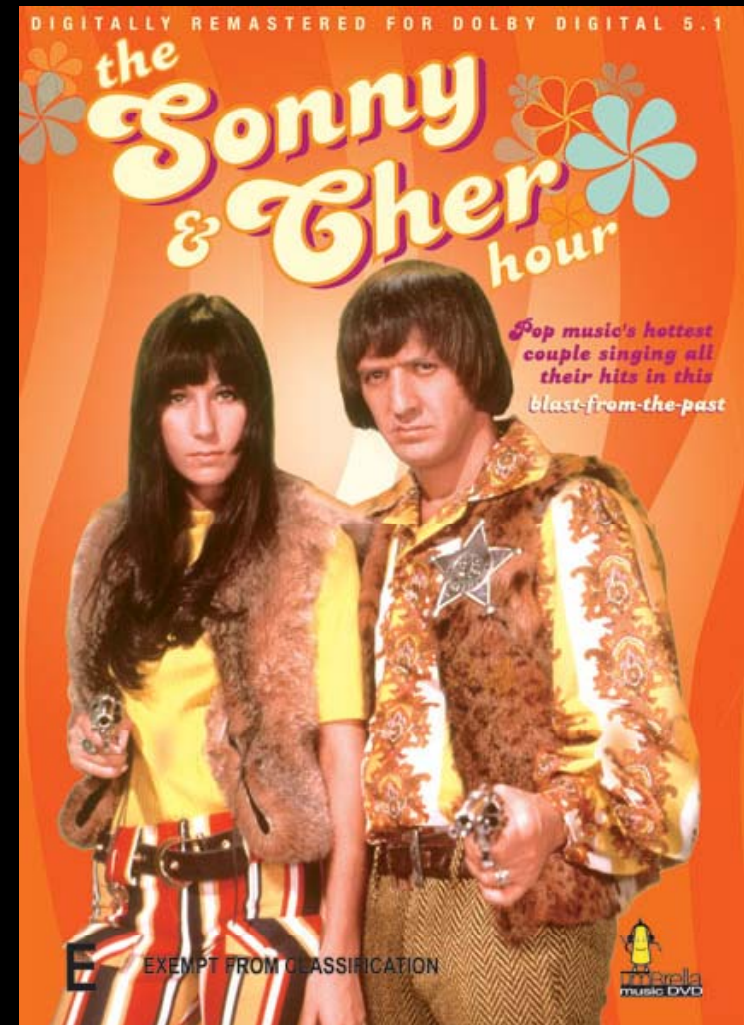
- Is the Message Clear & Concise
- Executive Summary
- Data to Back it Up



# ARCHITECT'S VIEWPOINT

## #6 EXPLORE EXTRODINARY OPPORTUNITIES

- Campus Partners
- Other Upcoming Campus Projects
- Campus Neighbors
- University Initiatives  
(Diversity / Career Services)
- A Chance to Provide New Services



# ARCHITECT'S VIEWPOINT

## #6 EXPLORE EXTRAORDINARY OPPORTUNITIES - PARTNERS

### Physically Shared Architecture- Advantages

- Common space - beyond the scope of a single university program
- Common programs - enhanced content and activities
- Greater campus appeal
- Common operations and maintenance
- Greater access to funding
- Economy of Construction



# ARCHITECT'S VIEWPOINT

## #6 EXPLORE EXTRAORDINARY OPPORTUNITIES - PARTNERS

- Can your Union serve the student life community better through partnering?
- Who would be the target audience/recipient of any service or programs?
- How is your union currently responding to these needs/issues?
- Who in your campus is responding to these needs/issues in a successful way?
- Does your union share similar goals or a mission with potential partners?
- Does your union share a challenge or obstacle with potential partners?





# ARCHITECT'S VIEWPOINT

## #7 VISUALS, VISUALS, VISUALS

➤ There is truth in the saying . . .

*"A PICTURE IS WORTH A  
THOUSAND WORDS."*



# ARCHITECT'S VIEWPOINT

## #7 VISUALS, VISUALS, VISUALS



# ARCHITECT'S VIEWPOINT

## #7 VISUALS, VISUALS, VISUALS



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# ARCHITECT'S VIEWPOINT

## #7 VISUALS, VISUALS, VISUALS



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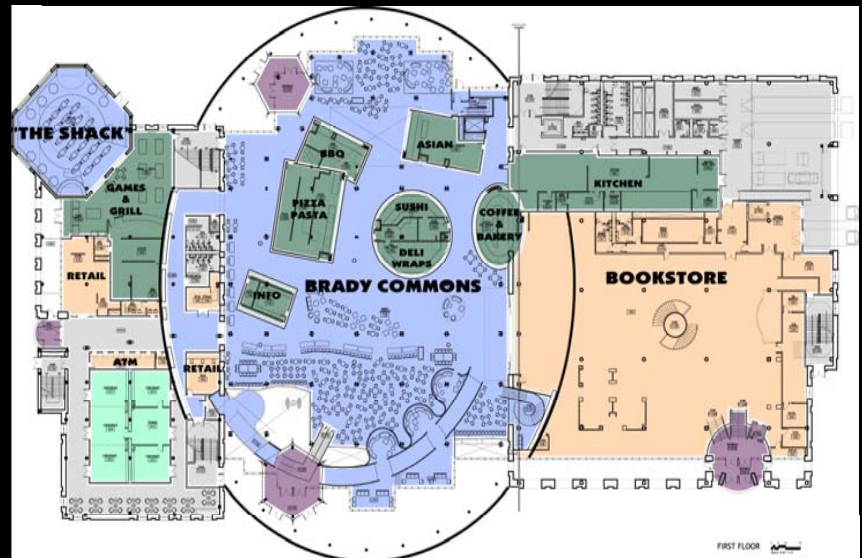
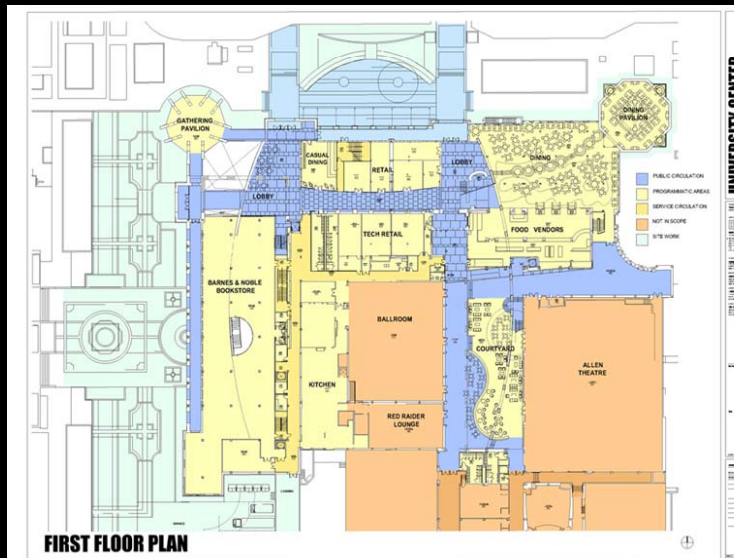
# ARCHITECT'S VIEWPOINT

## #7 VISUALS, VISUALS, VISUALS



# ARCHITECT'S VIEWPOINT

## #7 VISUALS, VISUALS, VISUALS



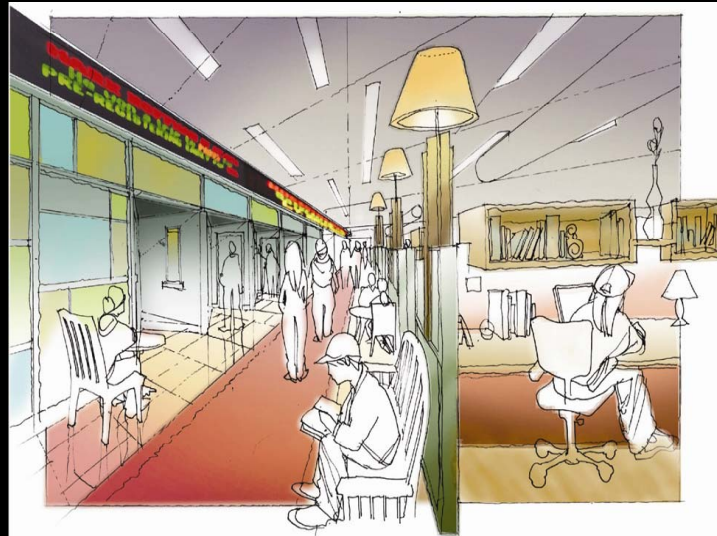
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# ARCHITECT'S VIEWPOINT

## #7 VISUALS, VISUALS, VISUALS



# ARCHITECT'S VIEWPOINT

## #7 VISUALS, VISUALS, VISUALS

### Texas Tech University Case Study

- Budget: Less than \$5,000.
  - Handouts
  - Posters
- Framing the Campaign
  - "its up to us"
- Active Student Involvement
  - Presentations
  - Distributing Handouts



#### University Center expansion/remodeling will include:

- An additional 120,000 sq. ft. of building space
- Remodeling of most of existing building
- New Student Organization Office spaces
- Expanded food service seating
- More fast food options
- Relocation of TTU Bookstore into UC
- New computer lab, up to 60 computers/printers
- New, larger locations for retail vendors
- Spaces for up to four new retail vendors
- Remodeling of all 2nd floor meeting rooms
- Create four new meeting rooms on 2nd floor
- New lounge and casual areas throughout building
- ... and much more!

#### It's up to us.

Recent surveys completed by the students of Texas Tech have indicated the need for changes in the current facility. The proposed expansion and renovation is in response to those needs. A wider variety of food choices, expanded gathering and lounge areas, and student organization office spaces topped the list. On October 12th you will have an opportunity to determine the future of your student center. Should the referendum pass, the increase of \$58 per semester will fund the project. The new fee will not be collected until the fall of 2000.

*Call The Student Government Association (742-3631)  
Or UC Main Office (742-3636) For More Information Or  
Schedule Of Presentations On The Project.*

**the University Center  
Addition and Remodeling Project**



# ARCHITECT'S VIEWPOINT

## #7 VISUALS, VISUALS, VISUALS

University of Missouri Columbia  
Case Study

- Budget: more than \$50,000.
  - Started with NO Budget
- Framing the Campaign
  - Seating and Dining Spaces
  - More Food
  - Lounge Space



# ARCHITECT'S VIEWPOINT

## #7 VISUALS, VISUALS, VISUALS

1. Posters
2. Hand-Outs
3. T-Shirts
4. Newspaper (campus and local)
5. Banners
6. Midnight B-B-Q and Band
7. Blood Drives
8. Informational Sessions
9. Meet the Architects
10. Model Displays



# ARCHITECT'S VIEWPOINT

## #7 VISUALS, VISUALS, VISUALS

### THE REFERENDUM

- Getting Students Motivated
- Students Need to Have a Voice
- Student Turnout
- Dealing with Adversity



# ARCHITECT'S VIEWPOINT

## #8 QUALITY, QUANTITY AND COST

- Determine the project you need and want.
- Balance
- Campus Standards Exterior
- Campus Standards Interior
- Building Services
- Image for Many Years to Come

QUALITY



QUANTITY



BUDGET

# ARCHITECT'S VIEWPOINT

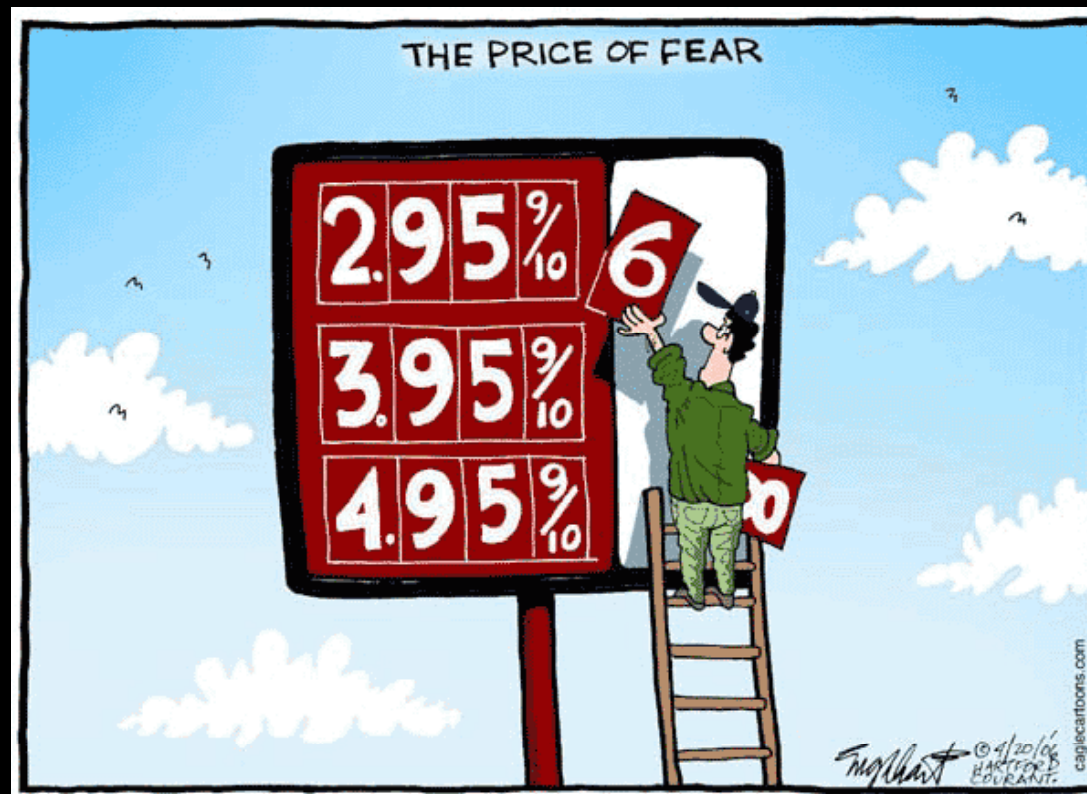
## #8 QUALITY, QUANTITY AND COST

Delaware State University Wellness Center and Student Center Dover, Delaware		SCENARIO #1 Based on Total Element				HOLZMAN MOSS ARCHITECTURE				
Student Center Program D		Qty	Area NSF	Total NSF	Cost/SF	Cost		Cost	Remarks	Existing Total NSF
<b>100 Social Spaces</b>										
Lounges	1	10	10							
Electronic Information Board	10	24	240					\$1,700		
E-Mail Stations	1	2,000	2,000					\$40,800		
Active Lounge	1	500	500					\$855,000		
Television Lounge	1	500	500		\$170	\$1,700		\$95,000		
Study Lounge/Quiet Area	1	500	500					\$95,000		
Spiritual Center	1	450	450					\$85,500		
			3,700					\$1,173,000		
<b>200 Food Service</b>										
Vending								\$15,300		
"The Club" (Grill/Dance/Games)								\$172,000		
Kitchen								\$570,000		
Seating	1	90	90		\$190	\$95,000		\$385,000	Playstation/X-Box	
Billiards/Video/Pinball/DDR/								\$385,000		
Coffee Bar								\$64,500		
Service Counter	1	800	800		\$190	\$85,500		\$114,000		
Seating	100	30	3,000					\$1,320,800		
	1	2,200	2,200							
<b>300 Retail Services</b>										
Student Mail Services			300	300						
Student Mail Boxes	20	30	600		\$190	\$114,000	900	\$171,000	3,500 Boxes	
Package/Mail Room							300	\$51,000		
Mailroom Office			6,990			\$1,320,800	120	\$20,400		

# ARCHITECT'S VIEWPOINT

## #9 PROTECT YOU BUDGET

- Escalation, Escalation, Escalation
- Global Factors and the Impact on *YOUR* Project.





# ARCHITECT'S VIEWPOINT

## #10 – STAY OR GO

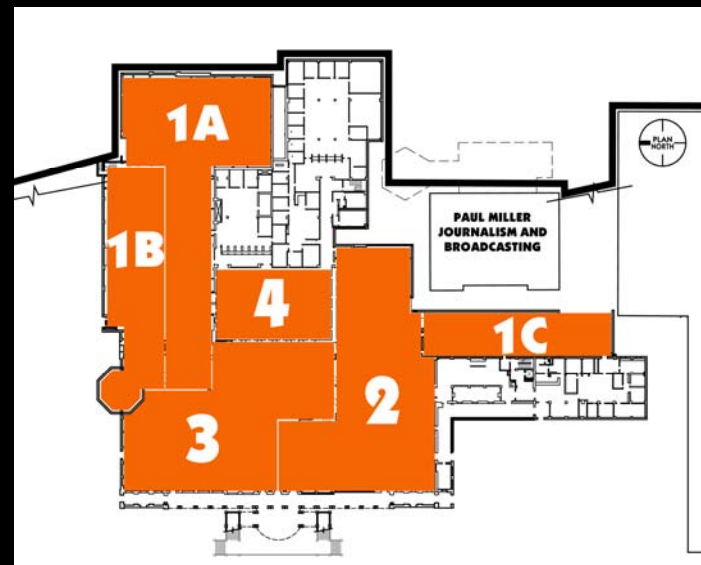
- Are you going to Stay or Go
  - *Planning the construction and impact to your Services*





# ARCHITECT'S VIEWPOINT

## #10 - STAY OR GO



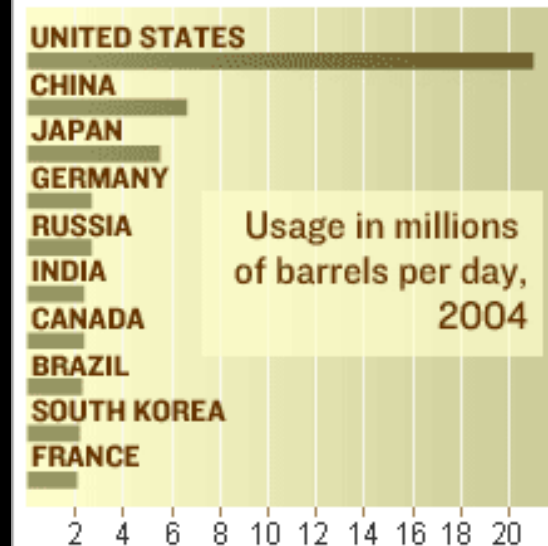
# ARCHITECT'S VIEWPOINT

## #11 – A CHANCE BE ENVIRONMENTALLY AND SOCIALLY RESPONSIBLE.

- Facility for next 20 years
- A Message to your constituents

### OIL-GUZZLING NATIONS

Although rising demand in developing countries such as China and India is often blamed for driving up oil prices, the United States is still by far the world's biggest user swallowing up over one quarter of total world output.



SOURCE: ENERGY INFORMATION ADMINISTRATION

# ARCHITECT'S VIEWPOINT

## #11 – A CHANCE BE ENVIRONMENTALLY AND SOCIALLY RESPONSIBLE.

### ➤ OCCUPANT HEALTH

Quality Indoor Environments improve working and learning.



### ➤ EDUCATIONAL

Providing learning Environments within the building



### ➤ ENVIRONMENTAL

Reducing pollution and protecting the ecosystem.



### ➤ ECONOMIC

Creating long-term operational and maintenance savings.



### ➤ PUBLIC RELATIONS

Sending a positive message to students, alumni, and the community about sustainability commitment.



# Questions and Answers



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ARCHITECTURE



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# PLANNING A CAPITAL PROJECT: 10 Steps for Getting Renovation, Additions or Expansions on the Right Track

For a copy of this presentation, please  
leave your business card or contact information.