

2002 NIRSA Conference

*Planning Your
Facility Opening*

Presented By:

Maureen McGonagle & Brad Noyes

Presentation Outline

- Introduction
- Business Plans
- Time Lines
- Furniture, Fixtures & Equipment
- Small Group Q & A
- Wrap-up

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Introduction

Today's Speakers

- Maureen McGonagle, MBA, CRSS
 - Director of Campus Recreation, DePaul University
 - Over 12 years of University Recreation Experience
 - Business / Campus Recreation
- Brad Noyes
 - Vice President, Brailsford & Dunlavey
 - Over 35 Sports & Recreation Projects
 - Architecture / Real Estate Finance / Strategic Planning

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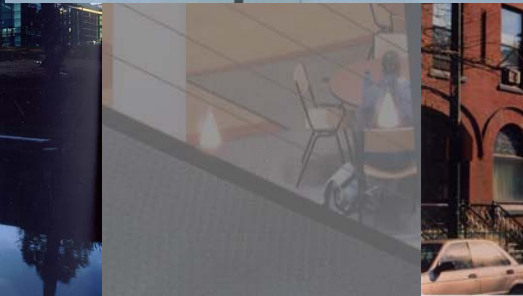
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Introduction

1. Participants will learn the importance and purpose of the business plan;
2. Participants will be able to set appropriate time lines; and
3. Participants will understand ff&e and learn strategies to coordinate it.

Recent Examples



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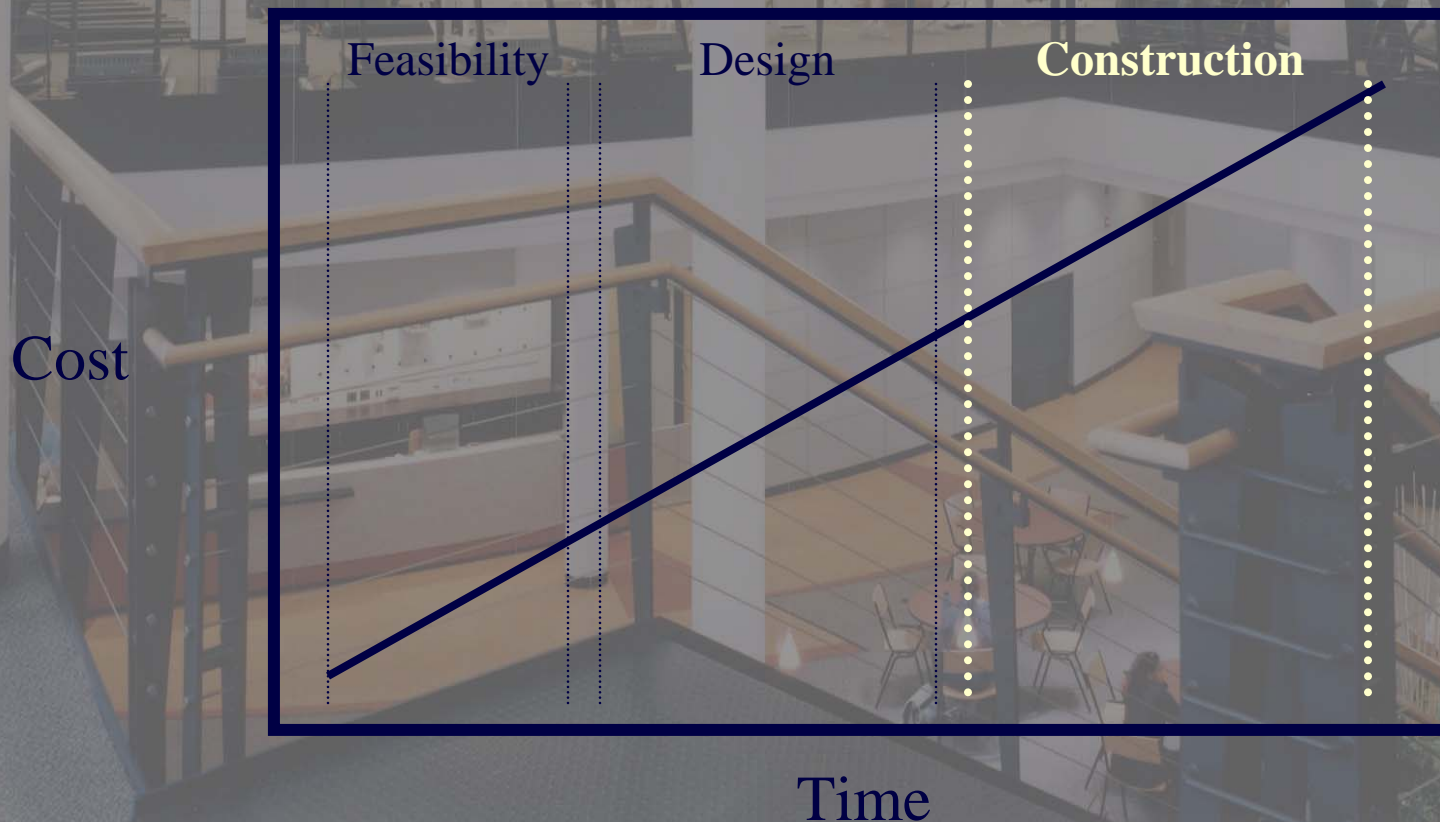


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Why Planning Is Important

Where are we in the process?



Why Planning Is Important

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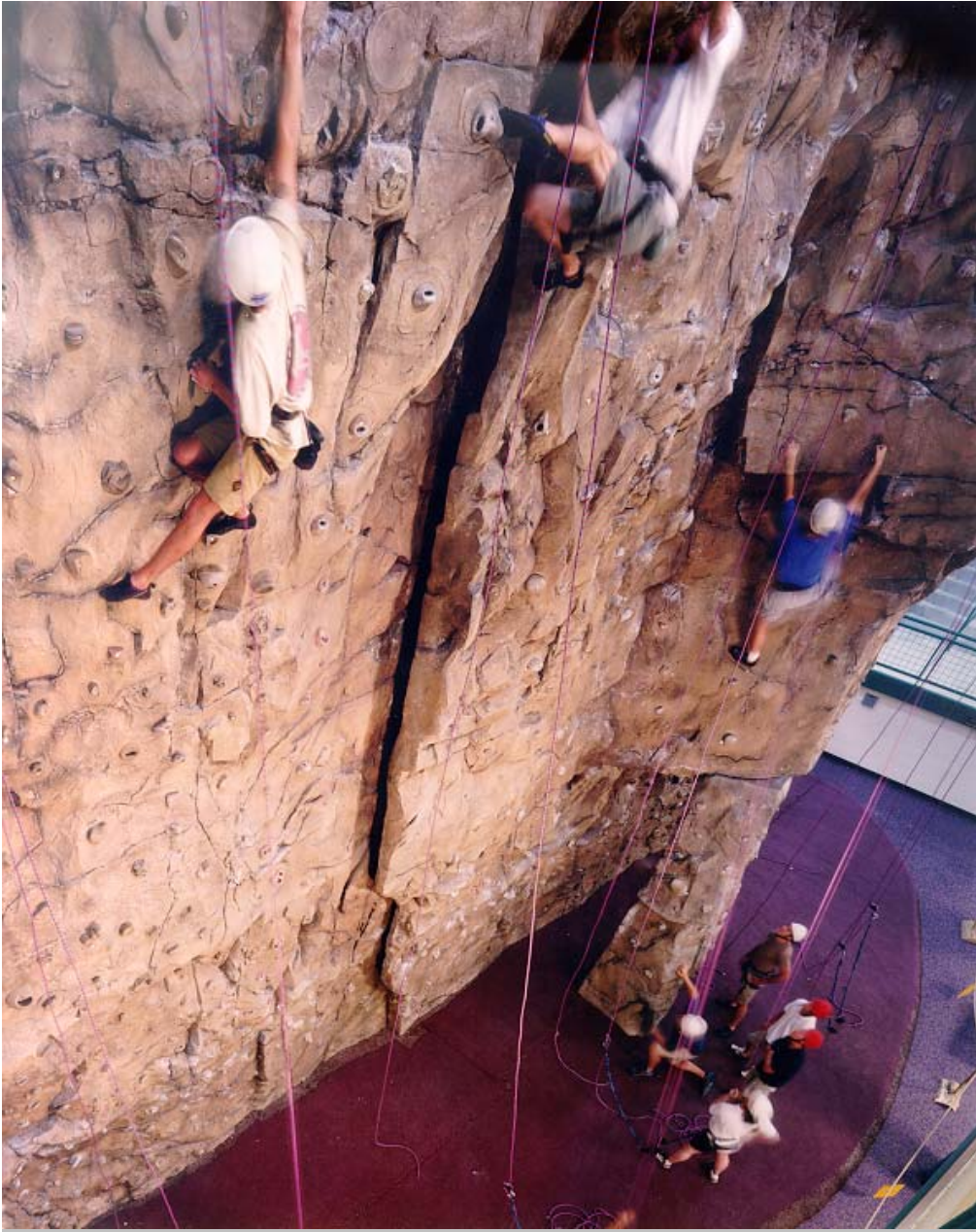
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Why Planning Is Important

Why Do We Need A Plan?

- Construction Phase (12 to 24 months long)
 - Hit the ground running
 - Staffing & Equipment
 - Operating Issues & Policies
- Management Tool
 - Blueprint for Managers
 - Annual Performance Evaluation
 - Institutionalization of Culture
- External Decision-Making & Approvals



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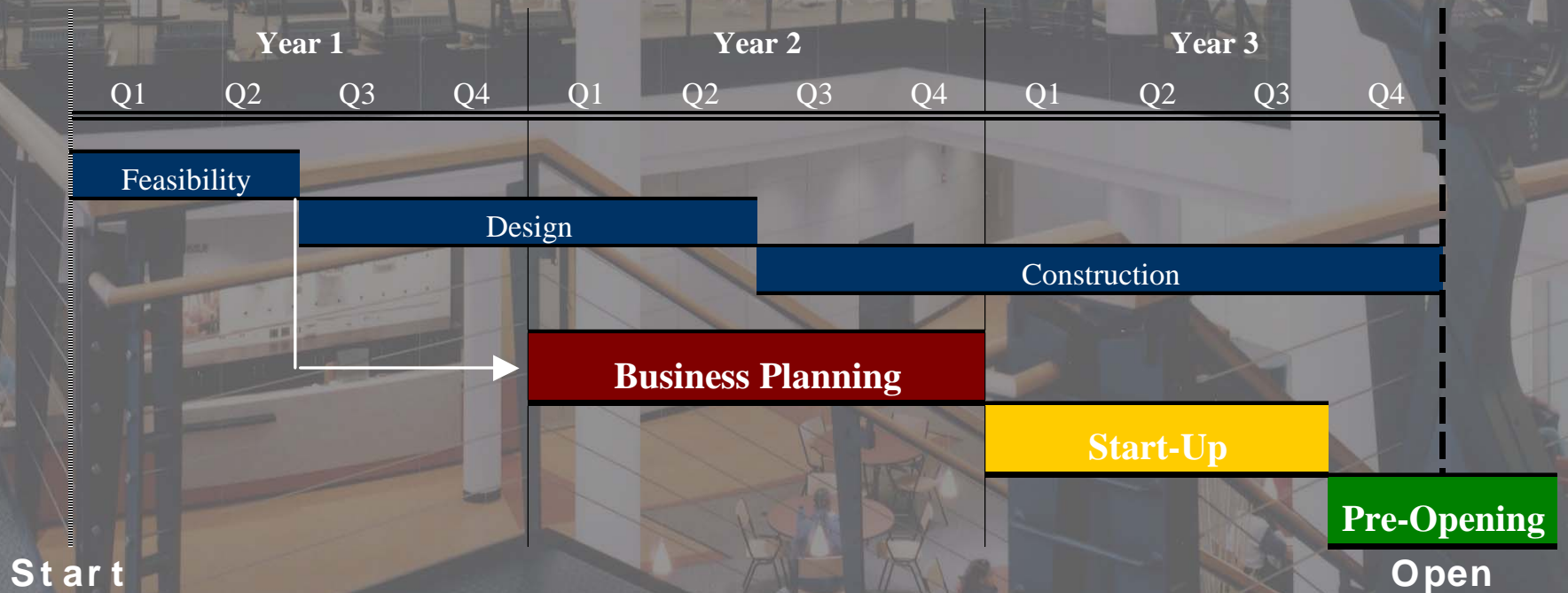
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Planning Step by Step

Timeline



Planning Step by Step

12 Months - Business Plan

1. Case Statement
2. Feasibility / Economic Justification
3. Operating Paradigm / Service Delivery & Pricing Strategy
4. Organizational Structure & Staffing Plan
5. Marketing Plan & Budget
6. Risk Mitigation Plan
7. Implementation Schedule

Planning Step by Step

12 Months - Business Plan

1. Case Statement

a. Mission Statement

- i. What services?
- ii. Services for who?
- iii. What are the targeted outcomes?
- iv. Why are the outcomes mission relevant?

Planning Step by Step

12 Months - Business Plan

1. Case Statement

a. Mission Statement

b. Current Conditions / Practices / Limitations

i. Facilities

ii. Financial condition (operating budget / reserves)

iii. Staff (quantity & skills)

iv. Services & Policies

v. Outcomes (positive / unattainable / negative)

Planning Step by Step

12 Months - Business Plan

1. Case Statement

- a. Mission Statement
- b. Current Conditions / Practices / Limitations
- c. Projected Conditions & Targeted Outcomes
 - i. Facilities
 - ii. Financial condition (operating budget / reserves)
 - iii. Staff (quantity & skills)
 - iv. Services & Policies

Planning Step by Step

12 Months - Business Plan

1. Case Statement

- a. Mission Statement
- b. Current Conditions / Practices / Limitations
- c. Projected Conditions & Targeted Outcomes
- d. Investment or Action Decision(s) Required
 - i. Facility / student fee / debt
 - ii. Additional staff (FTE)
 - iii. Related policies

Planning Step by Step

12 Months - Business Plan

1. Case Statement
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Planning Step by Step

12 Months - Business Plan

2. Financial Feasibility & Justification

- a. Direct Market Research
- b. Competitive Analysis
- c. Financial Analysis & Projections
- d. Industry Standards & Benchmarks
- e. Third Party Authority & Other Factual Support
- f. The Risk of Doing Nothing

Planning Step by Step

12 Months - Business Plan

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Planning Step by Step

12 Months - Business Plan

3. Operating Paradigm / Service Delivery / Prices

- a. Income Generating Strategy
- b. Level of Service Quality
- c. Membership Benefit Packages
- d. Pricing & Access Philosophy



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Planning Step by Step

12 Months - Business Plan

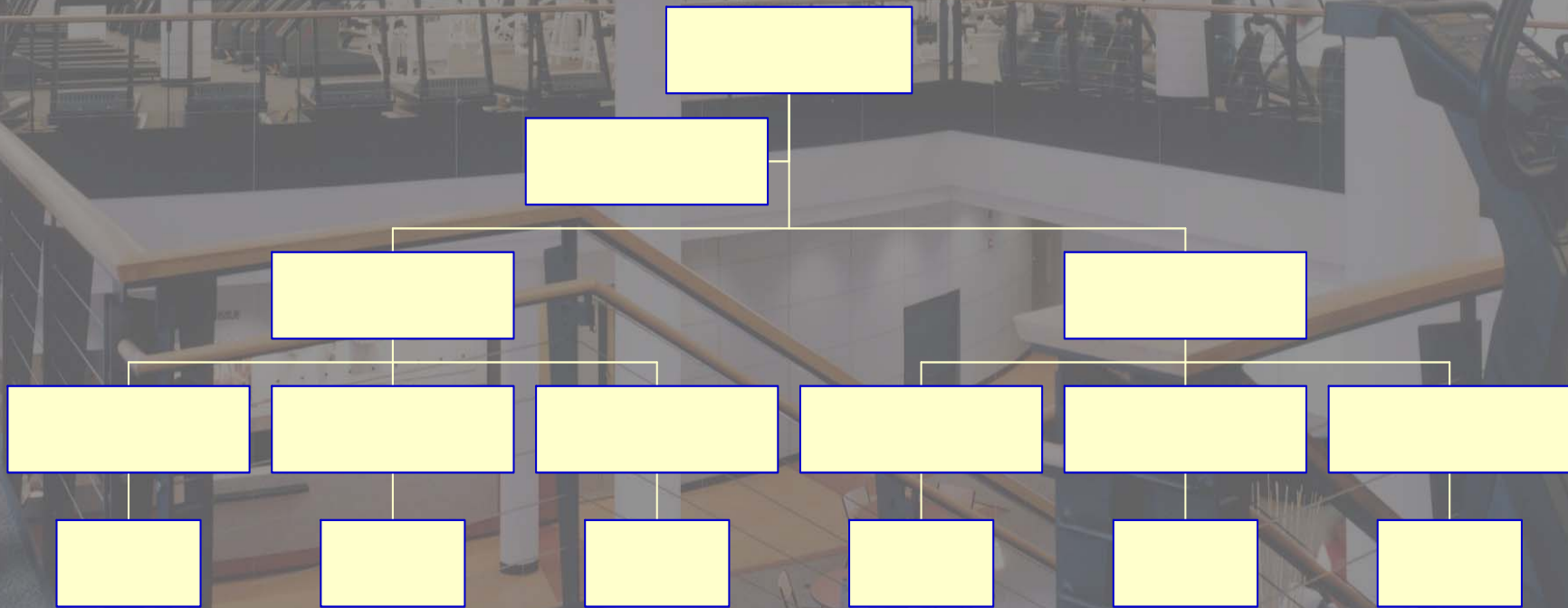
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Planning Step by Step

12 Months - Business Plan

4. Organizational Structure & Staffing Plan
 - a. Structure & Managerial Responsibilities
 - b. Recruiting Strategy
 - c. Compensation Plan
 - d. Full-time / Part-time Staff Distribution
 - e. Contracting Strategy (in-house vs. outsourced)

Planning Step by Step





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Planning Step by Step

12 Months - Business Plan

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Planning Step by Step

12 Months - Business Plan

5. Marketing Plan & Budget

- a. Establish Pre-Open Strategy (budget)
- b. Direct Mail Plan (budget)
- c. Patron Development / Customer Service Plan (budget)
- d. Information Technology Plan (budget)

Planning Step by Step

12 Months - Business Plan

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Planning Step by Step

12 Months - Business Plan

6. Risk Mitigation Plan

a. Identification of Potential Problems

- i. Market demand shifts
- ii. Fee base (enrollment stability)
- iii. Increased competition (off-campus / other schools)
- iv. Increased operating costs (utilities, salaries, reserve)

b. Risk Mitigation & Contingency Plans

- i. Pre-opening period
- ii. Start-up period
- iii. On-going research & quality control initiatives

Planning Step by Step

12 Months - Business Plan

1. Case Statement
2. Feasibility / Economic Justification
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7. Implementation Schedule

Planning Step by Step

12 Months - Business Plan

7. Implementation Schedule

- a. Pre-opening period (12 months to 3 months out)
 - i. Building construction
 - ii. Staff development
 - iii. Systems development & integration
 - iv. Program development
 - v. Marketing & public relations
- b. Start-up period (3 months to opening)

Planning Step by Step

12 Months - Business Plan

- ✓ Address the Audience Appropriately
 - Background Knowledge
 - Target The Right Issues / Questions / Concerns
- ✓ Treat “Why” Explanations as Most Important
- ✓ Be Specific & Back-up Facts
- ✓ Limit the Length (40 pages + exhibits)
- ✓ Ensure Internal Consistency

Planning Step by Step

12 Months – Business Plan

- Furniture Fixtures & Equipment
 - i. What is In and What is Out
 - ii. Conceptual Budgeting
 - iii. Opportunities for Reuse & Phasing
 - iv. Build Tracking Model
 - v. Defend the Budget!

Executing the Plan

9 Months - Pre-opening Period

- Building construction
- Staff development
- Systems development & integration
- Program development

Executing the Plan

9 Months - Pre-opening Period

- Building Construction
 - i. Review design
 - ii. Attend owner trailer meetings
 - iii. Seek advice from colleagues
 - iv. Changes are increasingly expensive



Executing the Plan

9 Months - Pre-opening Period

- Staff Development
 - i. Recruitment
 - ii. Training
 - iii. Contracting
 - iv. Start early



Executing the Plan

9 Months - Pre-opening Period

- Systems development & integration
 - i. Marketing
 - ii. Memberships
 - iii. Level of Service
 - iv. Consistency with business plan



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Executing the Plan

9 Months - Pre-opening Period

- Program Development
 - i. Scope
 - ii. Depth
 - iii. Priorities
 - iv. Policies/Fees



Executing the Plan

9 Months - Pre-opening Period

- Creating a New Program?
 - i. Learn Campus Culture
 - ii. Network
 - iii. Educate University Community
 - iv. Promote Opportunities



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Executing the Plan

9 Months - Pre-opening Period

- Furniture Fixtures & Equipment
 - i. How Much of What
 - ii. Quality and Aesthetics
 - iii. Schedule and Phasing
 - iv. User Input and Room Layouts
 - v. Vendor/Product Identification
 - vi. Site Tours

Executing the Plan

3 Months - Start-up Period

- Student staff hiring & training
- Marketing
- Negotiating contracts
- Membership services
- Outside revenues



Executing the Plan

3 Months - Start-up Period

- Furniture Fixtures & Equipment
 - i. How Much
 - ii. Institutional Requirements
 - iii. Specifications
 - iv. Lead Times
 - v. Bid Duration
 - vi. Purchase Orders/Credit Applications
 - vii. Delivery Coordination

Wrap-up

Key Points

- Your Planning Effort
 - Use an Appropriate Level of Detail
 - Macro (strategies & targets) => Micro (detailed answers)
 - Target Your Audience & Answer Key Questions
- Execution
 - Follow the Plan
 - Watch the Clock
 - Build the Team

Wrap-up

Key Points

- FF&E
 - Start Early
 - Buy In Bulk
 - Stagger Purchasing
 - Use a Budget Tracking Model
 - Allocate Adequate Staff Time
 - Allocate Smaller Items as Budgets



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Small Group Question & Answer

Planning Your Facility Opening

San Antonio, TX

April 10, 2002