

Shaping Up Your Strategy



NIRSA

Facilities Institute 2002



BRAILSFORD & DUNLAVEY
Facility Planning • Project Management

INTRODUCTION

Agenda

- Introduction
- Process Overview
- Getting off on the Right Foot
- Design
- Construction



INTRODUCTION

Introduction

- Meeting the Presenters
- Presenter Experience
- Review of Presentation Objectives
- Status of Participants Projects



INTRODUCTION

- Meet the Presenters

- Kim Martin

- University recreation background
 - Feasibility & marketing specialist

- Julie Skolnicki

- Architecture & construction background
 - Programming & architectural consulting specialist



INTRODUCTION

- About Brailsford & Dunlavey
 - Assignments
 - Strategic Planning
 - Feasibility
 - Programming
 - Financial Analysis
 - Business Planning
 - Design Consultation



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INTRODUCTION

- About Brailsford & Dunlavey - University Recreation Clients
 - Oakland University
 - University of Maryland
 - University of Houston
 - Kent State University
 - University of Alabama
 - West Virginia University
 - The Ohio State University
 - DePaul University
 - Louisiana State University
 - University of Michigan
 - Tulane University
 - University of Alabama at Birmingham



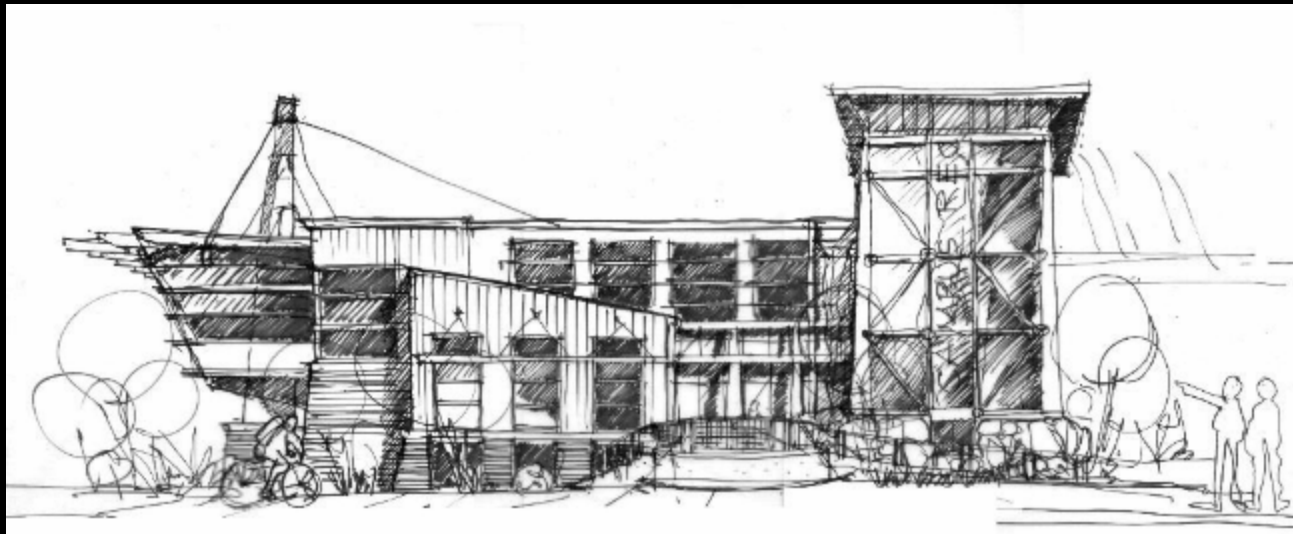
INTRODUCTION

- Presentation Objectives
 - Empower and Inform Recreation Professionals
 - Strategic Understanding - Planning Your Study
 - Building Your Team
 - Market, Programming & Financial
 - Staying involved during Design & Construction
 - Talking the Talk
 - Critical Decision Making



INTRODUCTION

- Status of Participant Projects
 - Idea?
 - Feasibility?
 - Design?
 - Construction?



PROCESS OVERVIEW



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PROCESS OVERVIEW

- Development Process Overview
 - Needs Assessment & Feasibility Assessment
 - Concept Development
 - Referendum/Student Approval
 - Programming
 - Business Planning
 - Design
 - Construction



PROCESS OVERVIEW

Needs Assessment & Feasibility

- Existing Facilities Analysis
- Mission Assessment – Strategic Asset Value Analysis
- Comparable/Model Schools Analysis
- Off-Campus Market Assessment
- Focus Groups – Students, Faculty & Staff
- Survey – DBP
- Programs/Schedule Analysis
- Detailed Financial Analysis & Integrated Modeling
- Site Capacity Analysis/Renovation Analysis



PROCESS OVERVIEW

Concept Development

- Project Vision
- Project Context
- Project Definition
- Consensus Building
- Detailed Financial Analysis
- Program / Budget / Site



PROCESS OVERVIEW

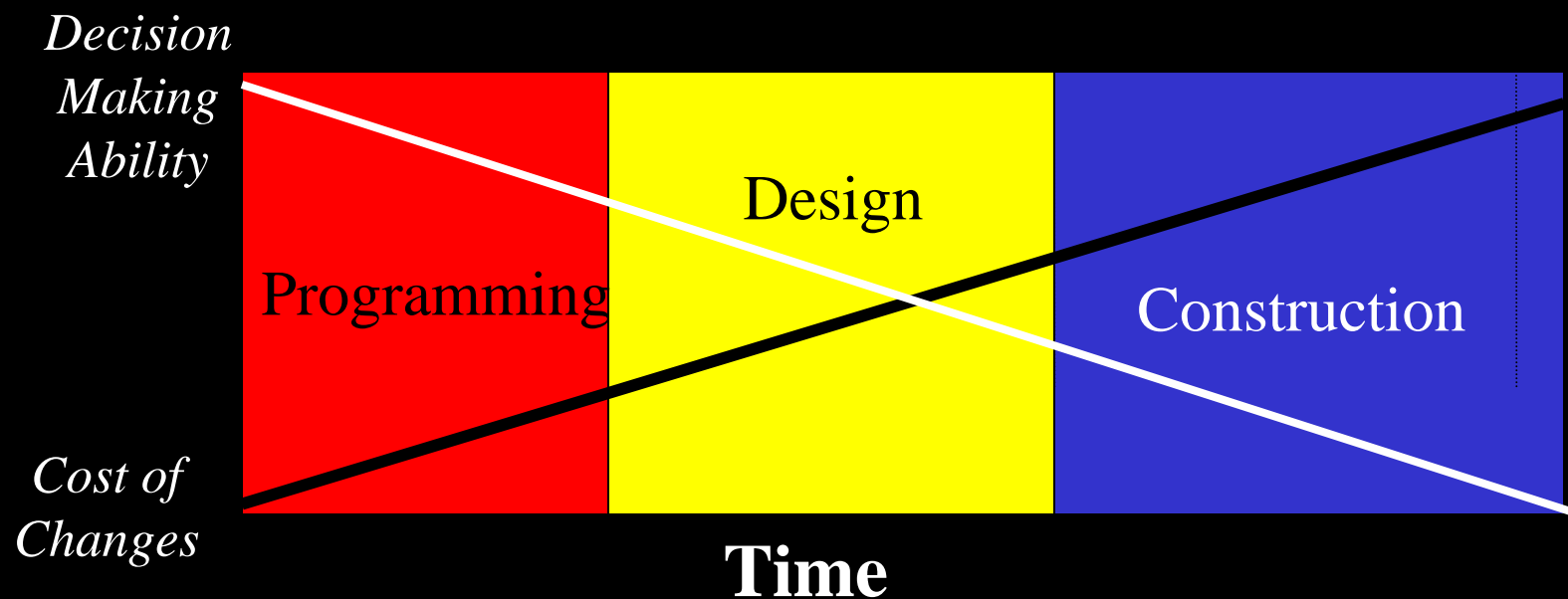
Referendum/Student Approval

- Student Committee Development
- Referendum Campaign Strategy
 - Not a Discovery Process
 - Get out to Vote Campaign
 - For the Students by the Students
- Scheduling
- University Policy



PROCESS OVERVIEW

Programming is the process of **seeking** and refining the requirements to be met by the final building design.



PROCESS OVERVIEW

Programming

- Project Objectives
- Design Philosophy
- Location & Site Requirements
- Outline Program
- Development Budget
- Functional Relationships
- Detailed Space Requirements
- Outline Specifications



PROCESS OVERVIEW

Business Planning

- Operating Paradigm
- Marketing Strategy
- Price Point Development
- Outside User Protocols
- Value-Added Services



PROCESS OVERVIEW

Design is the process of **solving** the requirements established by the program document under the parameters of budget, schedule & quality.



PROCESS OVERVIEW

Design

- Schematic Design
 - Review of Options
 - Preferred Design Concept
- Design Development
 - Arrangement/Organization
 - Size & Shape
- Construction Documents
 - Details, Details, Details
 - Materials Specification
 - FF&E



PROCESS OVERVIEW

Construction

- Bidding
- Construction Staging
- Phasing
- Exterior Development
- Fit-Out
- FF&E



Getting off on the Right Foot



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Getting off on the Right Foot

- Selecting the Working Group
- Selecting an Outside Firm
- Planning with a Mission
- Required Research
- Iterative Budgeting and Programming
- Getting the Go Ahead



Getting off on the Right Foot

Selecting the Working Group

- Role of Group
- Size of Group
- Broad Representation
- Significant Time Commitment
- Establish Milestones & Expectations
- The Players
 - Administration
 - Trustees
 - Faculty & Staff
 - Students



Getting off on the Right Foot

Selecting an Outside Firm

- Selection Process
- Relevant Experience
- Comprehensive Capabilities
- Chemistry
- Proposed Process
- The Players
 - Consultants
 - Architects & Engineers
 - Builders
 - Vendors & Contractors



Getting off on the Right Foot

Planning with a Mission

“All of the project's benefits must be expressed in specific terms that demonstrate their relevance to furthering the school's *mission*, reinforcing institutional *values*, responding to institutional *commitments and responsibilities*, and improving the school's competitive *market position*.”



Getting off on the Right Foot

Planning with a Mission

- Strategic Asset Value Analysis
 - Enhance Educational Outcomes
 - Enrollment Management
 - Campus Community



Getting off on the Right Foot

Required Research

- Comparable Schools & Model Facilities
- National Trends & Standards
- Schedule/Program Analysis
- Student Interest
- Administrative Will



Getting off on the Right Foot

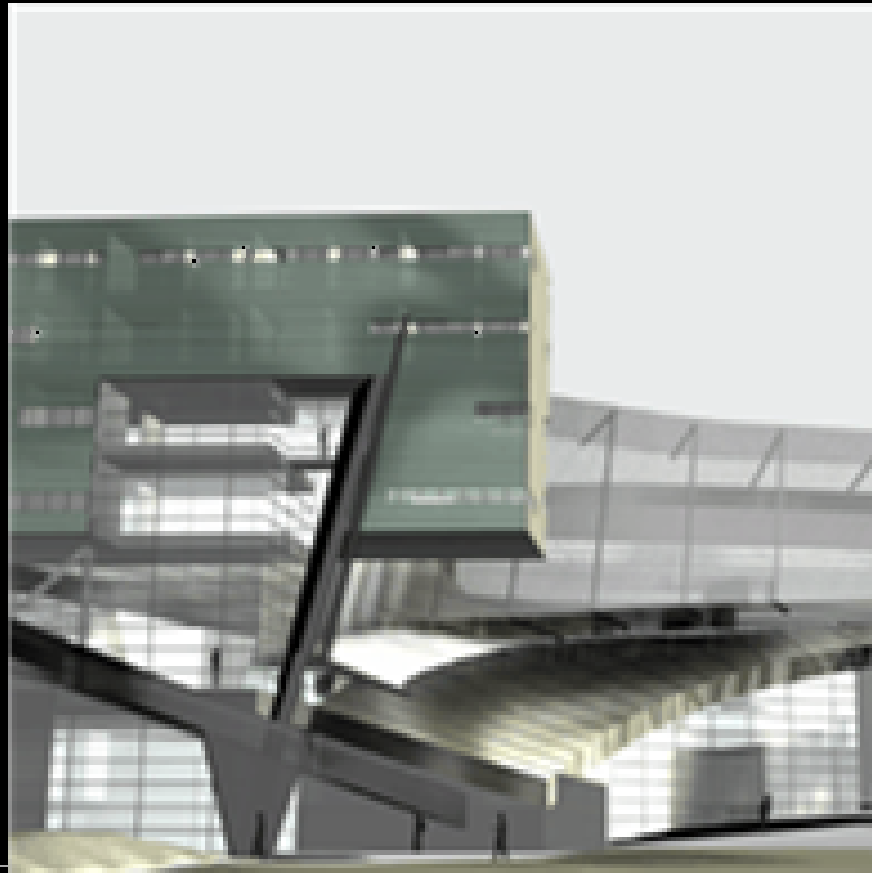
Iterative Budgeting and Programming

- Dynamic Programming
 - Prioritization
 - Creative Solutions
 - Add-Alternatives
 - Deduct-Alternatives
 - Expansion Opportunities
- Comprehensive Development Budget
 - Hard Costs
 - Soft Costs



DESIGN

Executing the Vision



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DESIGN

Selecting a Design Team

- Open and Fair Process
- Selection Schedule
- Develop Clear RFP/RFQ
- Site Tour & Interviews
- Key Factors
 - Experience
 - Approach
 - Cost
 - Personality



DESIGN

Working with the Architectural Engineering Team

- Meeting Schedule
- Phases of Design
- Contract Factors
 - Cost
 - Schedule
 - Program
- Review of Drawings & Specifications
- Cost Estimates
- Value Management



DESIGN

Furniture, Fixtures, Equipment (FF&E)

- Budgeting
- Research
- Specifications
- Bidding
- Procurement
- Delivery Schedule
- Drawing Coordination



DESIGN

Common Design Issues

- Compatability with Program
- Compatibility with Campus & School Values
- Integration with Campus Infrastructure & Master Plan
- Interior and Exterior Adjacencies
- Flexibility – Long Term Objectives
- Finishes
- Cost/SF



CONSTRUCTION

The Vision Becomes a Reality



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CONSTRUCTION

Working w/ the Construction Team

- Schedule
 - Traditional vs. Fast-Track
- Delivery Method
 - General Contractor (GMP vs. Cost Plus)
 - Design Build
 - Construction Manager
- Staff Roles
 - Project Manager, Site Superintendent, Support Staff
- Staging Plan



CONSTRUCTION

Furniture, Fixtures, Equipment (FF&E)

- Management Approaches
 - Internal
 - External
- Bidding
- Procurement
 - Additional Charges
 - Delivery, Certificate of Occupancy
 - Long Lead/Large Items
- Audio Visual, Security, etc.



CONSTRUCTION

Common Construction Issues

- Changing Products
- Changing Usages
- Cost Over-Runs
- Schedule
- Change Orders
- VE



CONSTRUCTION



- Move In
 - Getting to know the Building
 - Staff Hiring
 - Staff Training
 - Marketing
 - Punch List
 - Opening Day!

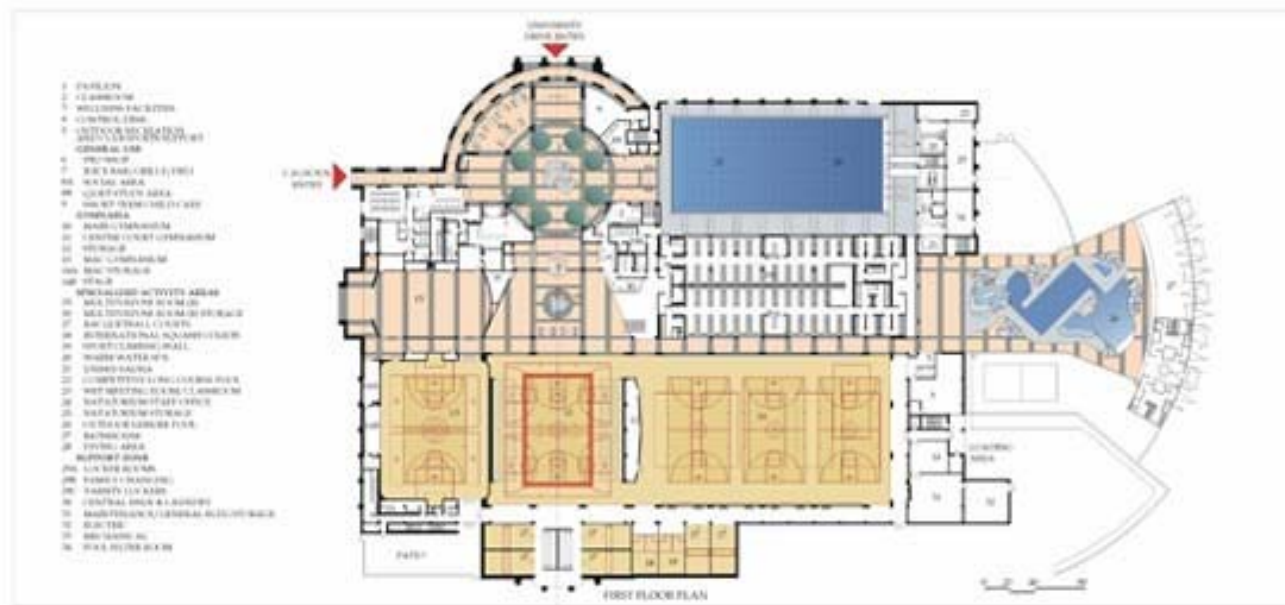


TRICKS OF THE TRADE

- Up Front Research
- Broad Involvement
- Build Consensus
- Consistent Leadership/Management
- Hire Experienced Partners
- Comprehensive and Conservative Budgeting
- Documentation
- Enjoy the Process



QUESTIONS & ANSWERS



ARCHITECTURAL SERVICES



STUDENT RECREATION AND WELLNESS CENTER



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