

protecting and leveraging your greatest asset with a facilities master plan

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what is a facilities master plan?

A Facilities Master Plan is the strategic, long-term document that align's a facility's infrastructure with an organization's goals and vision. It outlines current and future needs and is an essential tool for leadership to prioritize and direct facility requirements for capital investment, maintenance, renovation, growth, and flexibility for the future of your organization.

importance of a facilities master plan

The international Facility Management Association defines a strategic facility plan as "a plan that sets strategic facility goals based on the organization's strategic (business) objectives. The strategic facilities goals, in turn, determine short-term tactical plans, including prioritization of, and funding for annual facility related projects."

Facilities master planning is one of the most critical steps when creating an efficient, cost-effective facility that maximizes workflow, space economy, flexibility for future growth, and change. It is often one of the most overlooked steps in facilities project planning. Many organizations fail to recognize the importance of facilities master planning and choose to "skip" this critical step based on time and cost.

Workplace planning considerations are seeing significant change as we emerge from the COVID pandemic, elevating the importance of a strategic facility master plan. The imperative to respond to a healthy workplace, flexibility in "work styles," remote work requirements, assets to attract and retain staff, collaboration, and technology place a new emphasis on facilities master planning.

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goals of a facility master plan

The goals for a facility master plan should be tailored to the individual requirements of the organization. The organization should begin the process with specific goals. Common topics to explore to establish appropriate goals include incorporating and understanding the following:

- Leadership Initiatives
- Workforce Considerations
- Quality Expectations
- Function & Workflow
- Image / Brand
- Investment
- Timing / Phasing

framework for a successful plan

The facility master plan will provide the framework for development of a successful process and plan including, site-specific integration of program elements, existing conditions, and infrastructure systems. The framework to begin the process should include:

- Goals - the foundation for the plan
- Begin with an end in mind
- Identify key stakeholders
- Incorporate an existing facility audit as part of the plan
- Assemble pertinent organization information in advance



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information required to begin the planning process

Distribution of the following information to the Facilities Master Plan Team in advance of project kickoff is critical to establish an organized and productive project start.

CORE VALUES STATEMENT

Current organization Core Values Statement with commentary as appropriate. For organizations without a formal Core Values Statement the summary of organizational priorities that drive the desired culture.

CURRENT STRATEGIC PLAN

Current organization Strategic Plan with commentary as appropriate.

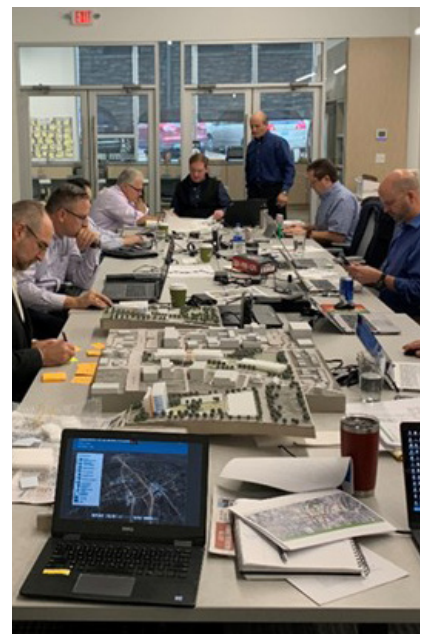
ORGANIZATION INFORMATION

Pertinent organization information typically includes, client design standards, brand guidelines, number of employees, organization chart, departments & number of employees in each, departmental adjacency requirements, completed program data sheets, emergency power and redundancy utility requirements, building utility capacities and service entrance locations, MEP Systems information, occupancy / operating hours, security requirements, furniture standards & workstation sizes, storage requirements by space or department, existing building drawings, maintenance records, parking requirements, and organization specific special requirements.

process

Key elements of a comprehensive facilities master plan process include:

- Collect and distribute key client and facility information
- Site investigation
- Facility audit and assessment
- Kick-off Meeting to establish key stakeholders, goals, objectives, and tasks
- Department interviews including leadership out brief at each session
- Maintenance staff meeting
- Planning / Charette Sessions (typically 2 to 5)
- Presentation of Draft Facility Master Plan including executive summary
- Leadership Draft Facility Master Plan prioritization and decision making
- Presentation of Final Facility Master Plan including executive summary
- Delivery of Master Plan Report



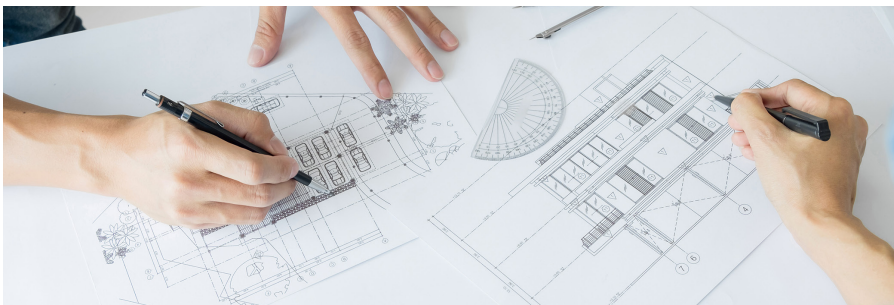
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outcome

The facility master plan should provide an “actionable” plan that is the basis for development of a statement of work and scope of services. This “road map” will outline information for leadership use in development of next steps to move forward with a capital plan complete with timeline, phasing requirements (if required), and budget considerations (construction, equipment, owner furnished items, and soft costs).

Typical Bound Final Facilities Master Plan Report include the following:

- Executive Summary
- Participant List
- General requirements narrative & recommendations
- HVAC, plumbing, fire protection, electrical, telecommunications & special systems narrative
- Facility assessment report / audit
- Code analysis
- Phasing narrative
- Pros / Cons of renovation vs. new build
- Program data sheets
- Programming excel spreadsheet
- Special considerations / equipment matrix
- Concept floor plans
- Concept construction cost estimate
- Design and construction schedule
- Action Item List
- Project meeting / correspondence documentation
- Appendices (supporting documents)



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project example

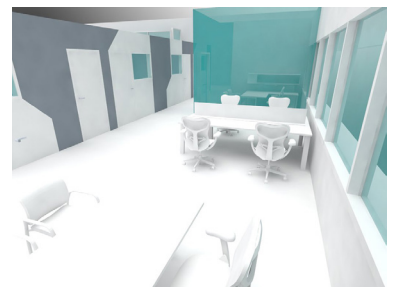
The comprehensive facilities master plan prepared by emersion DESIGN for a University of Cincinnati 177,000 gsf academic facility provided the road map for a 6-phase multi-year renovation.

A primary goal for the facilities master plan was to support the capital improvement priorities identified, such that, when completed, would serve campus physical, academic and budget goals in a coordinated and complimentary manner.

The University's goals and objectives to renovate this large academic building to provide classrooms, offices, instructional & research science laboratories, broadcast studios, community spaces, conferencing, and lounge spaces to support current and future active learning requirements have been realized through the first four phases of renovation as a direct result of completing the facility master plan and utilizing it as the "road map" to implement the long term vision for this critical academic asset.

In addition to meeting the University's academic goals and objectives, the completed phases one through four of achieved a bid cost differential (master plan vs. actual cost) of less a 1.0% with total change orders (including University requested modifications) of just 6.4%.

With just two phases remaining the project is well on its way an academic and financial success.





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Steve has over 40 years' of business leadership and project management experience. Prior to co-founding emersion DESIGN, he was the President and CEO for a 100-person architectural/engineering firm with offices in Ohio and Florida. He has expertise with projects such as campus master plans, computer centers, research and testing facilities, healthcare facilities, labs, university academic buildings, and engineering centers. Steve has managed over \$1 Billion in construction projects.

emersion DESIGN, located in Cincinnati, Ohio is a collaborative architecture, interior design, planning, structural engineering and sustainable design firm driven by a passion for exceptional designs that advance clients and society.

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