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Leading With Facilities Data: Mastering Your Campus Master Plan

Introduction

A campus master plan should serve as a strategic roadmap that guides the alignment of the physical campus with your long-term objectives and advances resiliency across the full spectrum of institutional activity. But as with most journeys, it's important to know precisely where you stand today to reach your target destination. This is particularly critical now as an array of shifting business variables are compelling campus leaders to confront intensified pressure to adapt and transform the foundations of an evolving learning environment.

Consequently and inevitably, master planning overemphasizes details about the future yet relies on information about current campus conditions informed by general anecdotes, subjective impressions and outdated historical data. Facts and rigorous analysis often take a back seat.

When the planning process focuses too much on the future desires of a campus without addressing its existing demands, the master plan is built on a shaky foundation and becomes markedly more difficult to realize.

A well-informed master plan begins with an exploration of objective facilities condition data. This information can be developed into something more actionable than a list of needs: It can form the basis of a strategic and adaptable project plan that reflects key institutional priorities and identifies the greatest areas of need. The result is a useful resource that serves as the bedrock of the master planning process.



Common Pitfalls of the Master Planning Process

A campus master plan is commonly viewed as a decisive opportunity to engage researchers and campus and community leaders in a strategic discourse. Thus, when an institution's administration decides they need a master plan, they often turn to planners or designers as their first resource. These professionals can provide planners with critical information, including campus maps, details on campus size, and the age and function of each piece of property. The designer might ask campus leadership to identify programmatic priorities or the levels of functional distress within existing spaces. This information is often used to drive design.

However, this typical process has its pitfalls:

- 1. The plan will include the biases and preferences of institutional governance or consulting faculty, potentially to the exclusion of important information.** If the president's focus is on a legacy that includes strengthening certain academic programs, for example, that vision might exclude the importance of modernizing the residence halls as a tool for student recruitment.
- 2. The focus tends to be on growth through new construction, rather than repurposing existing buildings.** The allure of adding a new building is often greater than the desire to renovate a structure that has existed for years. Additionally, people are generally more comfortable talking about new solutions rather than coping with old problems, particularly problems that aren't clearly documented. But focusing on the new doesn't make the old issues disappear. In fact, as financing is poured into new construction, it may remove resources that could be used to update buildings that must be renovated or demolish buildings that should be abandoned.
- 3. The resulting master plan will reflect the planning team's preferences.** Author Esther Jno-Charles is credited with saying, "What you focus on expands." This is apt wisdom for master planning. If the planning team focuses on designing new buildings, then new buildings will become the focal point of the plan. Adhering too rigidly to any one strategy compromises the plan's capacity to adapt to changing conditions or emerging opportunities. Balancing adaptability with prevailing directives is a pivotal characteristic of a sustainable master plan.

For institutions that have experienced these pitfalls, an examination of the plan's potential exposures does not have to wait until the next master planning cycle. You might consider updating your plan to account for a reassessment of priorities and their associated costs, and to address portions of the plan that aren't performing or perhaps weren't included at the onset of the planning process.

Waiting to address your master planning problems means losing time to put financing solutions in place, allowing conditions to further deteriorate or pursuing a course of action that will add to increasingly unmanageable maintenance and operation costs.

Whether you're initiating or updating a master plan, now is the time to take a fresh, data-driven approach to this major strategic effort.

Start Strong With Data

An objective and historically contextual analysis of facilities performance data provides a perspective that is critical in developing an informed, sustainable master plan. Consider how data analysis:

1. **Helps institutions be more intelligent, thoughtful owners.** It provides the foundation for more informed decision-making that acknowledges current and ongoing needs and expenses.
2. **Guides institutions to better manage their master planners.** Master planning must focus equally on addressing issues inside existing buildings and adding new facilities. Data helps support this mindset as an intelligent starting place. A facilities condition assessment provides concrete evidence that certain buildings must be accounted for in the planning process to ensure the institution continues to meet campus needs. Facilities performance benchmarking and analytical insights can provide a contextual understanding of how specific investment decisions align with broader market trends. This data will impact a campus' competitive edge in an increasingly volatile environment.
3. **Empowers people across campus.** By engaging people across campus in the review of existing conditions and priorities before beginning the master planning process, campus stewards can better ensure they are speaking to an informed audience who understands the constraints and compromises necessary to create a successful master plan. Additionally, it can open up the conversation on complex issues so the planner can focus on resolving them rather than finding them.

Planning firms across the country create master plans that are often exciting, dynamic and inspirational, and will attend to the stated needs of the institution. However, a planning process lacking data that demonstrates how campus properties support the institution may result in a campus that ages poorly and is unable to support the institution into the future. Existing financial plans only compound the issue, as they may not provide the capacity to support the campus over time and risk becoming out of sync with the realities of the industry.



3 Foundational Steps To Improve Planning Prioritization

- 1. Identify all the information you believe you need to be the most knowledgeable partner for your master planner.**
- 2. Gather all existing information and determine what data you are missing.**
- 3. Initiate an assessment process that provides a thorough understanding of current campus conditions and prioritizes needs. This process may include:**
 - Collecting data on deferred maintenance, including any existing deferred maintenance studies.
 - A field assessment that involves walking through all campus buildings and inventorying what's there as well as the general condition of all equipment types, interior finishes, exterior facades and relevant systems.
 - Engaging with the facilities staff and other people in charge of maintaining the campus to understand their priorities and capture their knowledge of the conditions as a result of living with them day in and day out.
 - Conducting interviews with IT, Security, Residential Life and other designated department heads or institutional leaders to gather a fuller picture of how the existing campus facilities are performing.

The information mined from these activities should be used to prioritize building portfolio needs and establish a strategic framework for linking today's investment realities with future campus aspirations. This understanding can then be used to channel the planners' creativity into the areas that need to be addressed in the plan, whether that's reinvesting in existing needs, removing certain buildings or building new.

The goal at this stage of the planning process is to develop scenarios that are fully informed by an extensive knowledge of existing circumstances and prevailing trends. Generally there are more beneficial outcomes when incorporating a complete understanding of existing needs versus trying to address everything by building new.

Conclusion

Gordian has learned from countless institutional engagements that most campuses lack the resources to properly support its property. It's also not a revelation to say the circumstances in higher education are transforming. The built environment is particularly at risk, as current campus plans are predicated on outdated growth patterns that are unlikely to come to fruition. Institutions must be judicious about adding to or supplementing their campus portfolio.

The typical master planning process is susceptible to overlooking existing needs. This oversight is not willful, but an unfortunate result of underdeveloped facilities data and vulnerabilities in the transfer of knowledge and insights. By getting a solid picture of where the institution is today, the innovation and ingenuity typical of the planning process can be channeled to create the most powerful and financially-responsible impact upon the campus.

Gordian has worked with countless campuses across North America to collect, assemble and objectively assess facilities performance data that can be harnessed to inform and enable a sustainable campus master plan. Integrating these objective metrics with insights we've honed over decades of working with campus leaders on the advancement of facilities priorities, we can help you develop a plan that is strategic, validated and easy to communicate. Further, we can guide the implementation of an analytical facilities decision-making framework that measures the impact of planning actions taken and ensures the investment decisions you make steer your institution to an ideal future state.

About Gordian

Gordian is the leading provider of facility and construction cost data, software and services for all phases of the building lifecycle. From planning to design, procurement, construction and operations, Gordian delivers groundbreaking solutions to contractors, architects, engineers, business and financial officers and facility owners in local, state and federal governments, education, healthcare and other industries. A pioneer of Job Order Contracting (JOC), Gordian's offerings also include our proprietary RSMeans data and Facility Intelligence solutions. We develop and maintain the largest collection of labor, material and equipment data and associated costs for all areas of construction. Gordian's solutions are accessed through our innovative software platforms and supported by a team of industry experts proven to help clients maximize efficiency, optimize cost savings and increase building quality.



[Learn how Gordian can help you optimize the resources serving your campus facilities portfolio and enable balanced action toward your institutional goals.](#)