



Physical Planning Overview

UNIVERSITY OF WISCONSIN BOARD OF REGENTS

May 2007



Physical Planning Overview

- Integrated Strategic Planning
- Campus Master Planning
- Biennial Planning
- Pre-Planning of Projects

Integrated Strategic Planning

- Engaging, inclusive process of defining how an institution's resource base will be best allocated to achieve its mission.
- Systematic, rigorous definition of goals and initiatives.
- Resources intentionally allocated to support educational programs.
- Comprised of several discrete planning efforts:
 - Academic Planning (Mission-Driven)
 - Financial Planning (Operational and Capital)
 - Campus and Facilities Planning

Integrated Strategic Planning



Why do Integrated Strategic Planning?

- Sought prior to reaccreditation by The Higher Learning Commission of the North Central Association of Colleges and Schools (HLC-NCA).
- NCA/HLC Requirement

“The organization’s resource base supports its educational programs and its plans for maintaining and strengthening their quality in the future.”



Answers Basic Questions

- Who are we serving now?
- Who do we want to serve in the future?
- What programs will we want to offer?
- What fiscal, personnel, physical, and technological resources will we need?



Academic Planning is Critical

- Defines the programs to be offered to specific higher education markets
- Determines resources needed for success
- Determines array of support programs (academic and student service)



Academic Planning = Program Review and Prioritization

- Enhancement
- Maintenance
- Maintenance but Monitored
- Reduction in Resources
- Suspension or Closure

Prioritization

- Most institutions are unrealistically striving to be all things to all people rather than focusing resources on the mission and programs they can accomplish with distinction.

Robert C. Dickeson is Senior Vice President of Lumina Foundation

Fiscal Planning and Budgeting

- Cyclical process of planning, budgeting and assessment
- Based on data and a limited amount of anecdotal information
- Cannot replace healthy intuition and sound judgment
- Chancellor must ultimately make allocation decisions

Campus and Facilities Planning

- Systematic review and planning of facility resources needed to support programs and campus mission.
- Predominantly issues-based planning informed by some formula-based planning (e.g. labs, offices, etc.)

Campus and Facilities Planning

- Image & identity, access & circulation, buildings (existing and future), parking, open space, infrastructure.
- Influenced by pedagogy, space use, technology, deferred maintenance, operational costs, available funding, available land, environmental issues, etc.

Campus Master Planning

- Engage the campus community and host municipality;
- Define principles for organizing physical spaces;
- Establish 20-year development patterns;
- Identify implementation sequence in 6-year increments;
- Document the process and results;
- Refresh biennially and substantially updated every 10 years.

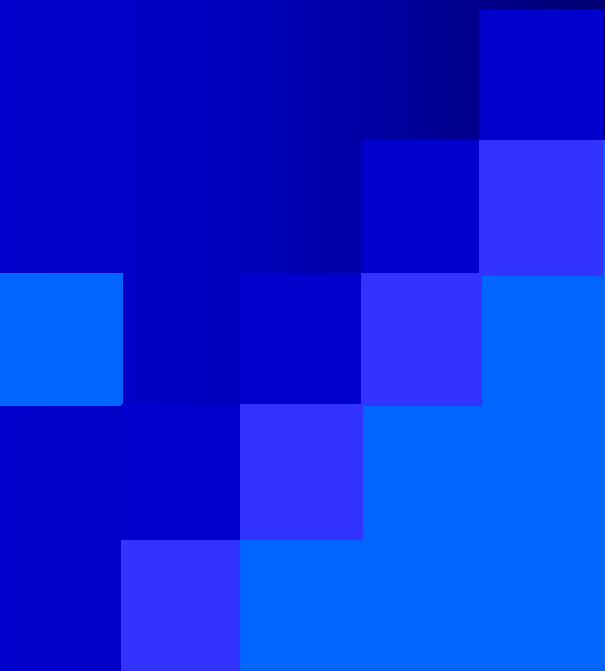


Biennial Planning

- Biennial Budget Timeline
- Campus Physical Development Plans
- UW System Physical Development Plan

Timeline Accommodates

- Campus Shared Governance
- UW System Workload
- BOR Input
- DOA workload
- SBC Process



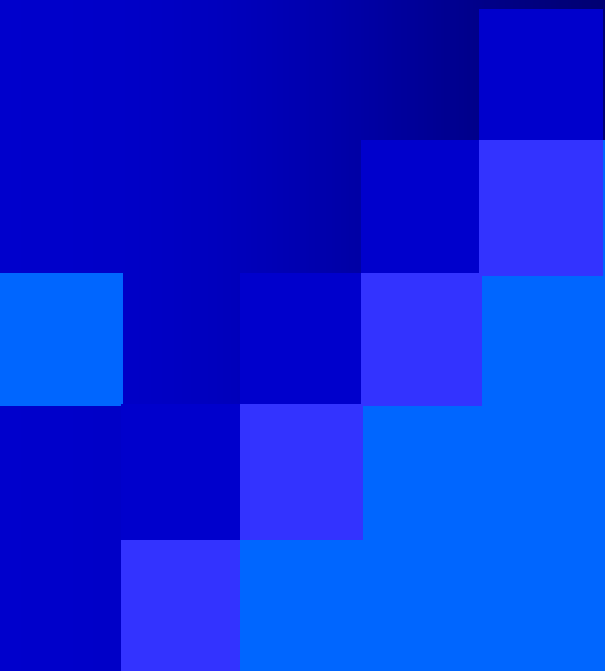
UW-Campus Physical Development Plan

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Improved Format for Campus Physical Development Plans

- More graphic
- More concise text
- Easier to understand
- Easier to modify over time
- Better communication to key audiences



UW System Physical Development Plan

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UNIVERSITY OF WISCONSIN
SYSTEM
PHYSICAL DEVELOPMENT
PLAN
2009-2015

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Capital Project Pre-Planning

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Why change the process?

- To permit more accurate project scope and budget to be developed prior to project enumeration.
- To gain even higher quality campuses via a strong process of matching and maintaining congruency between the intended program, budget/cost, and schedule of a project from conception through implementation.

How is pre-planning funded?

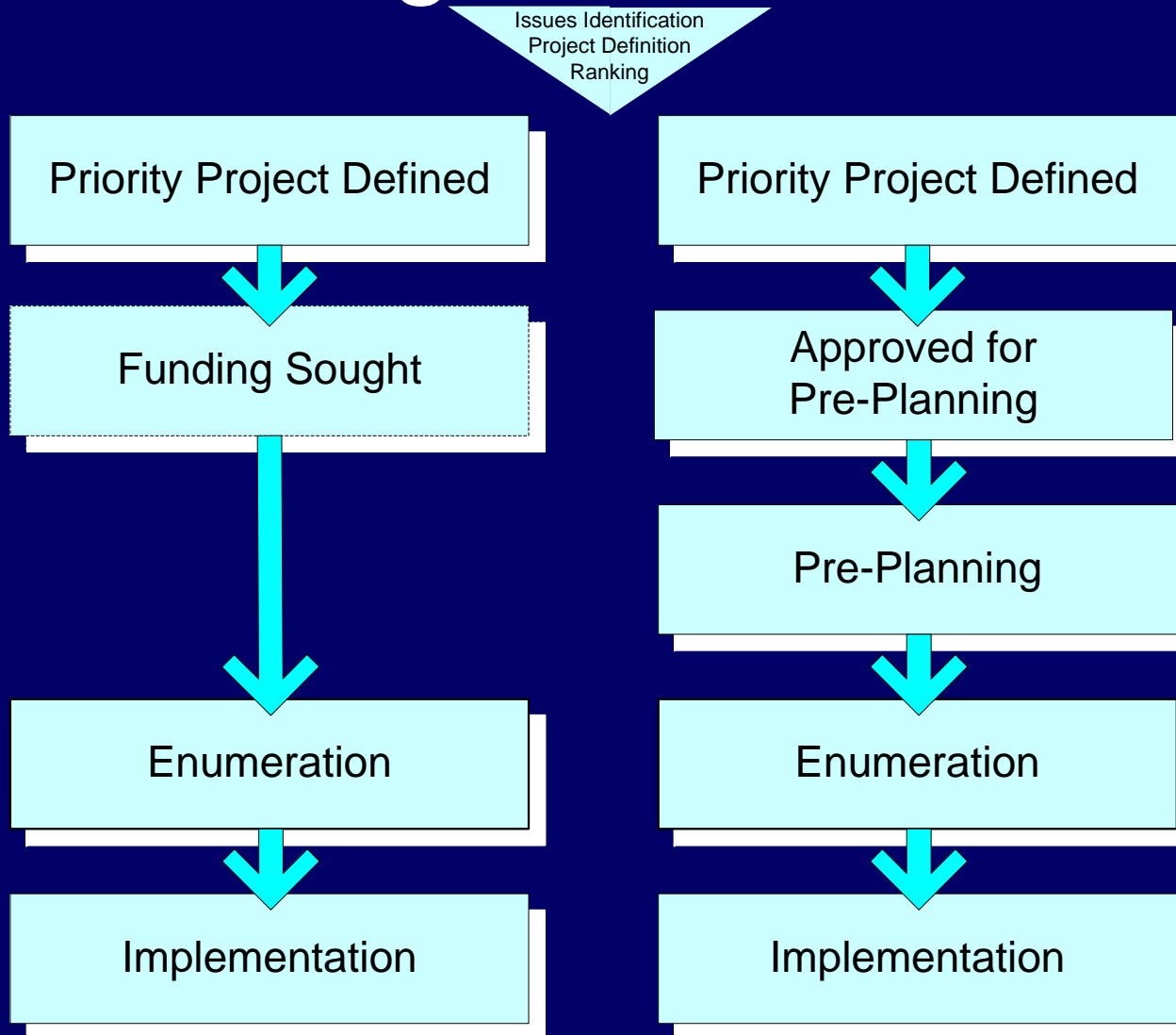
- Building Trust Funds - Planning
- Will require Building Commission approval to release building trust funds.



Which projects will have pre-planning?

- Major Projects - PR & GPR
- Complex or large All Agency Projects

Pre-Planning Process



Results of Pre-Planning Process

- High potential for CONGRUENCE of:
 - PROGRAM
 - COST
 - SCHEDULE