

Activating a Transformational Framework for Capital Planning Collaboration



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Course Description

Explore how ideas about creating a framework for facilities, business and planning collaboration can be applied to work in conjunction with other key planning ideas on the campus. This allows the framework to be activated and realize its transformational potential.

Learning Objectives

- Detail the framework's guidelines for stimulating engaged and collaborative discussion to prioritize campus programs and facilities as well as aid in decision-making.
- Assess how your institution collectively manages facilities, finance, and planning actions as either a lagging response or a leading planning element.
- Consider your campus facilities infrastructure in terms of embodied debt, risk exposure, future program compatibility, and adaptability.
- Identify ways to use the framework to initiate an engaged dialogue on your campus.

Suburban Legends



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Finance, Facilities and Planning:

Rethinking the Framework for Collaboration in Higher Education – A Whitepaper

APPA

<https://www.appa.org/facilities-manager/rethinking-the-framework-for-collaboration/>

NACUBO

<https://www.nacubo.org/Publications/The-Solutions-Exchange/Rethinking-the-Framework-for-Collaboration>

SCUP

<https://www.scup.org/wp-content/uploads/2023/07/1-Rethinking-the-Framework-for-Collaboration-White-Paper.pdf>

Gordian

<https://www.gordian.com/uploads/2022/11/Rethinking-the-Framework-for-Collaboration-White-Paper.pdf>



Agenda

- Overview - The Framework for Facilities, Finance and Planning Collaboration
- Open Discussion
- Questions and Answers

Framework for Finance, Facilities and Planning Collaboration



Poll Question

Are you already aware of the Framework for Collaboration being discussed today?

1.

Yes, I am up to speed

2.

I think I read about it somewhere

3.

I saw a presentation at another gathering or webinar but want to know more

4.

No, I am unaware

5.

Wait, what? I'm still finishing breakfast...sorry. What did you say?

Why a Framework?



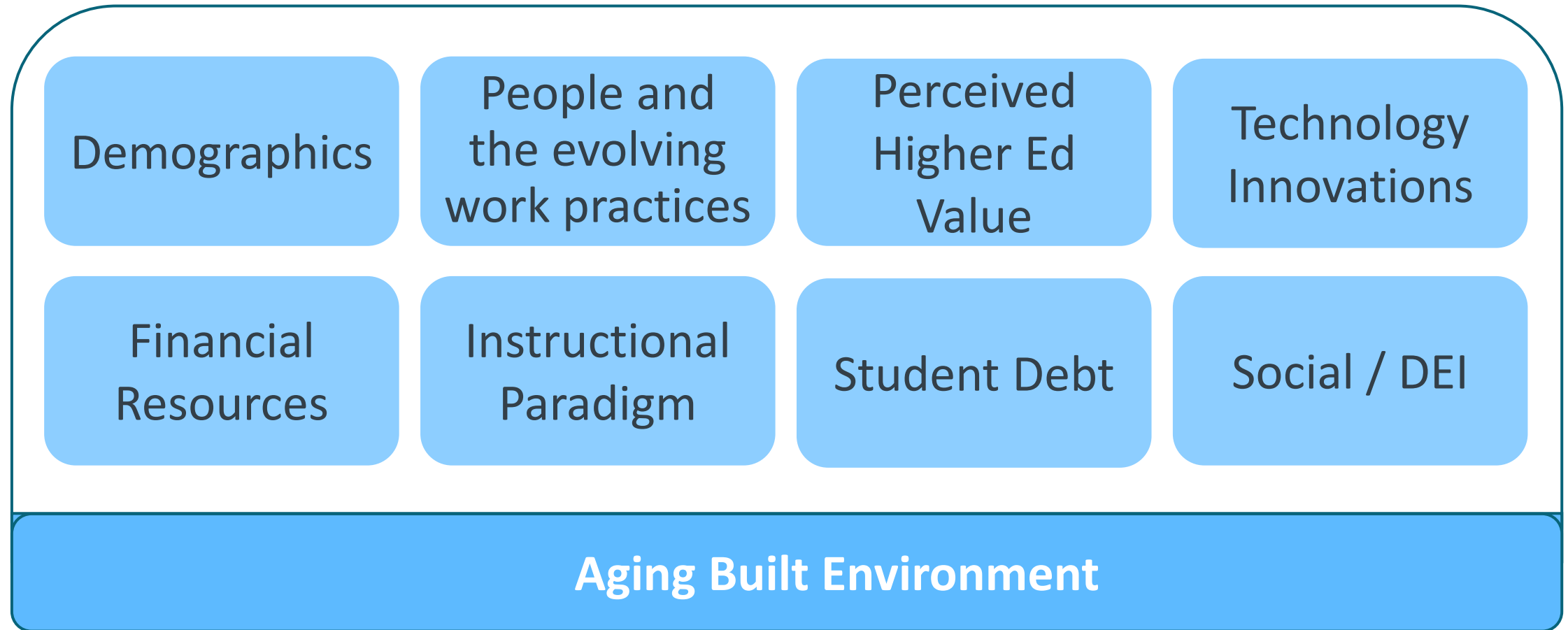
The Big Picture

Our Song

- **Trends** lead you
- **Challenges** threaten to lead you
- **Opportunities** become the places where you provide impact

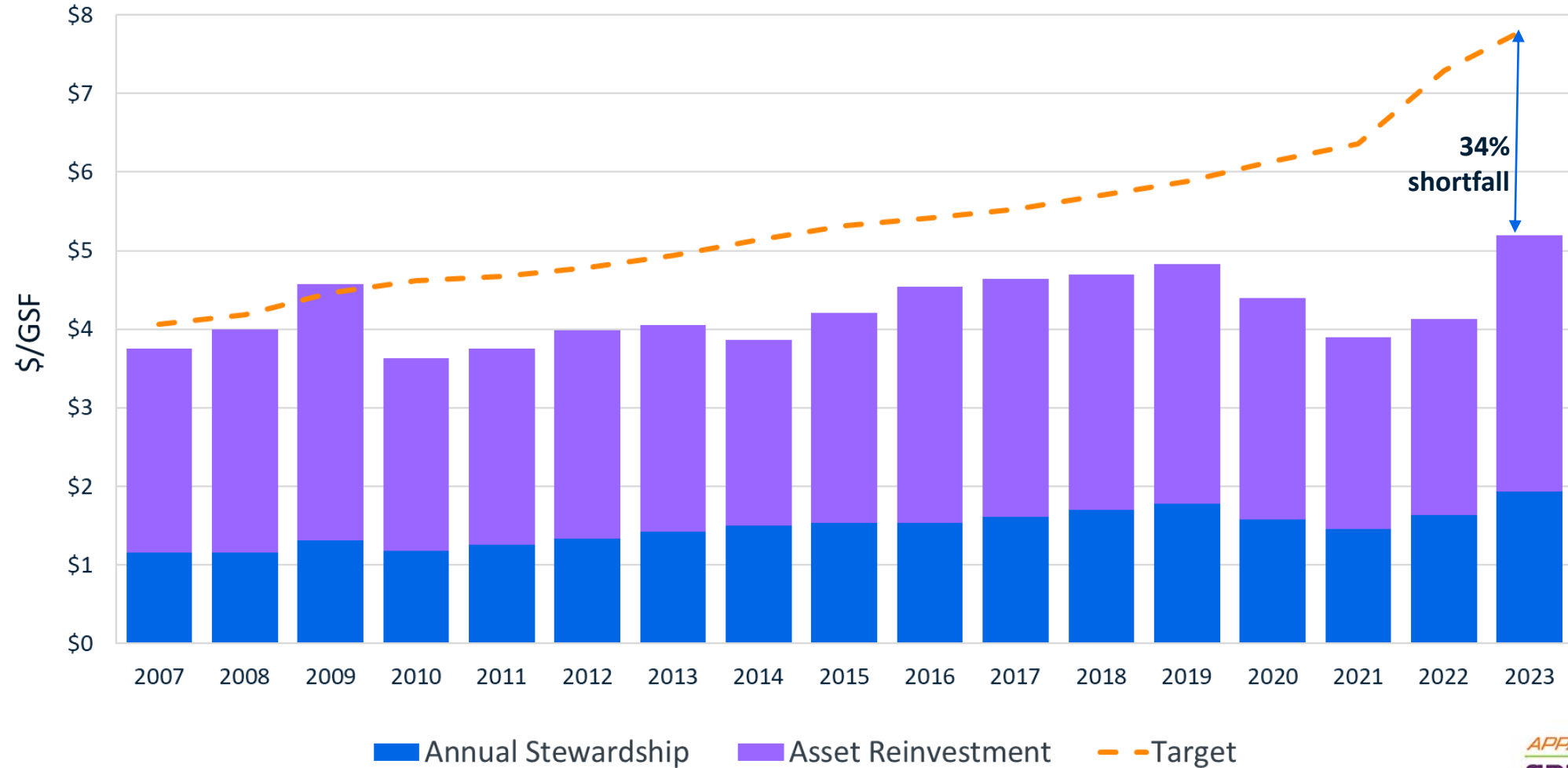
Impetus

Sad Beautiful Tragic: Underlying struggles, pandemic accelerated vulnerabilities and opportunities



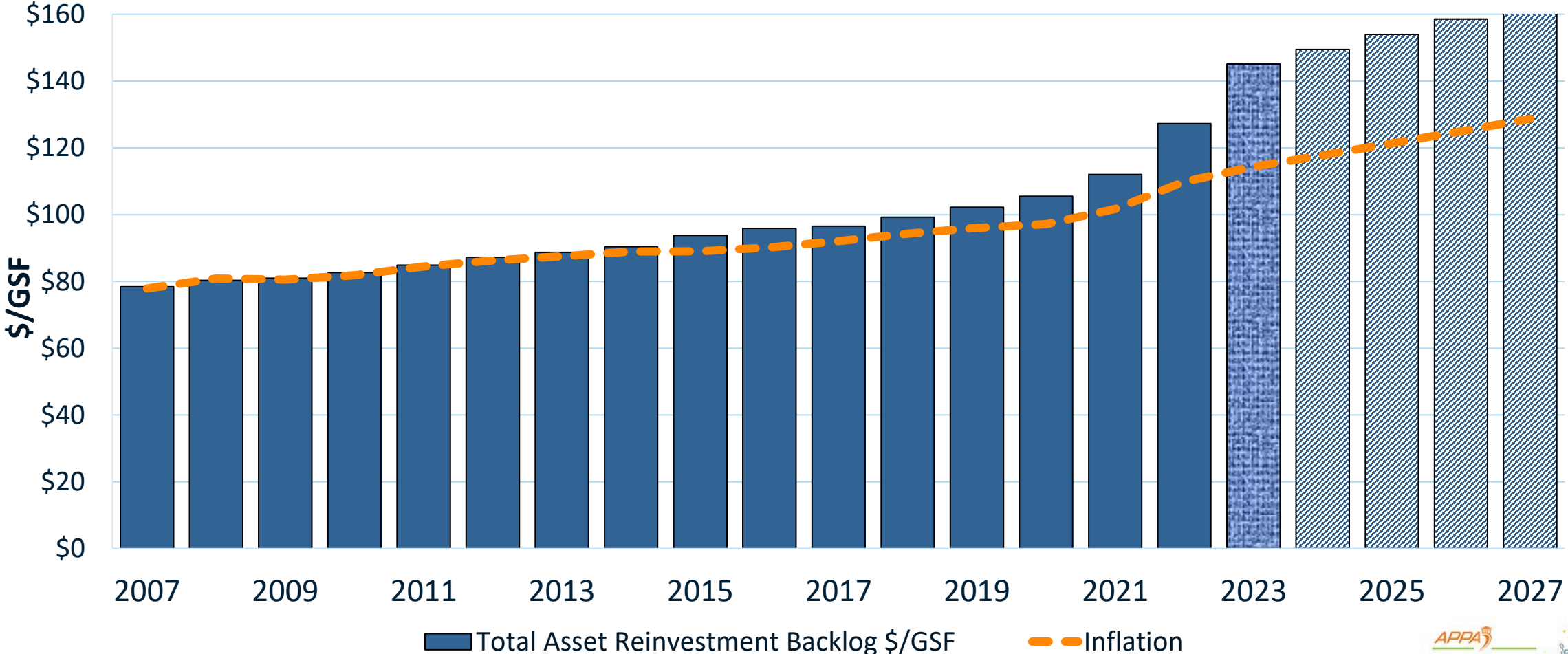
The Capital Investment Gap Challenge for Existing Buildings

Capital Spending vs. Investment Target



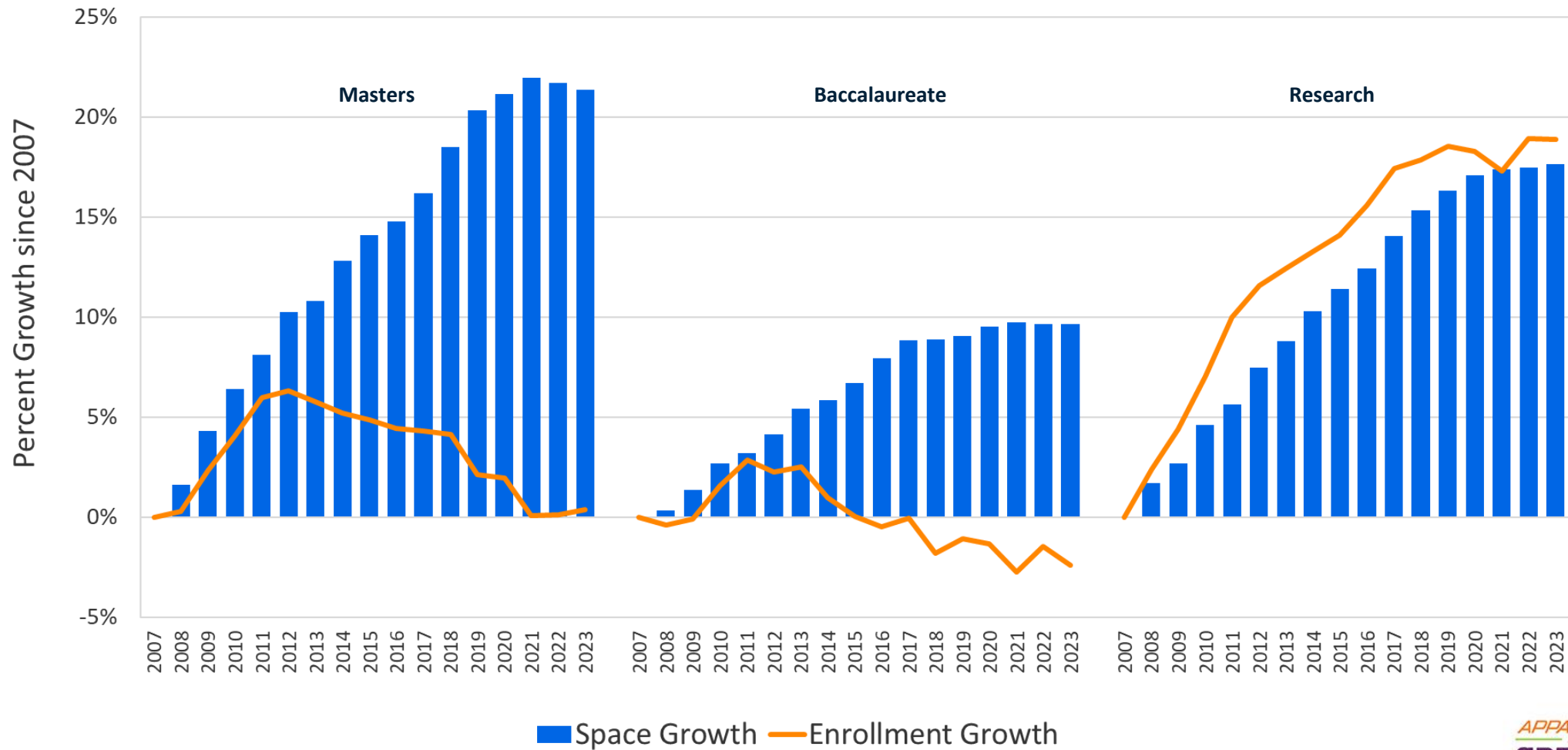
Backlog Escalation

Nothing New



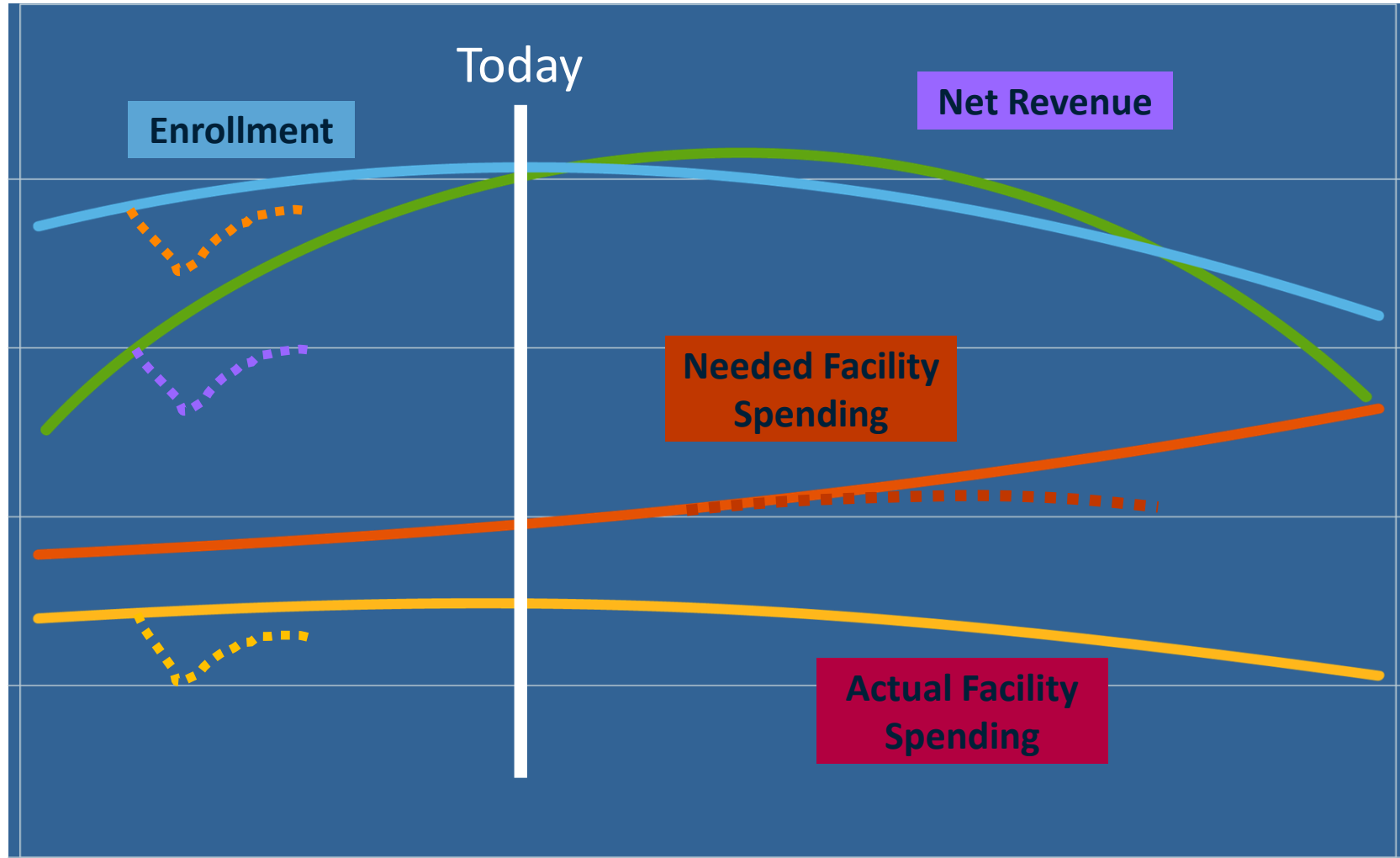
Space and Enrollment Growth Misalignments

Space Growth vs. Enrollment Growth



The Path Forward

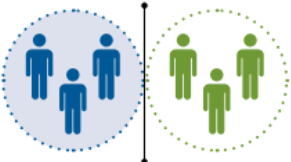
Bad Blood



Created by Bryan Harvey



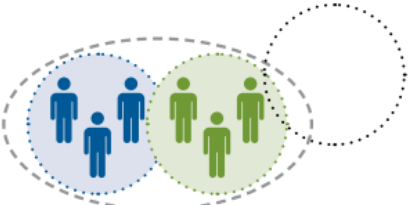
Six Boundary Spanning Practices



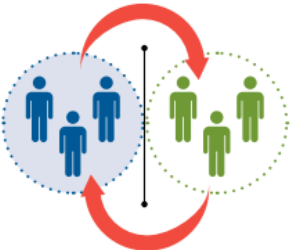
BUFFERING



CONNECTING



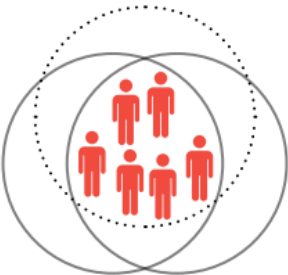
WEAVING



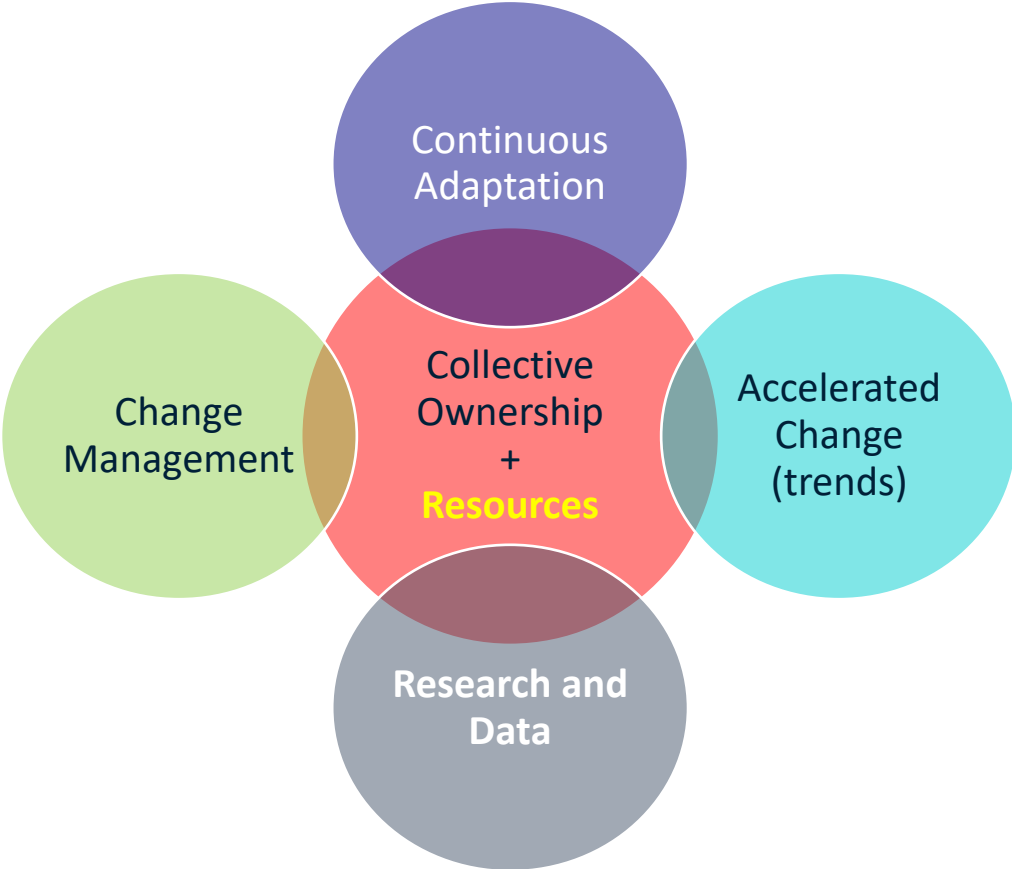
REFLECTING



MOBILIZING



TRANSFORMING



An Inflection Point



Lagging
(Reactive Behaviors)

Leading
(Proactive Engagement)

Poll Question

Is cross campus collaboration forward focused or mired in reaction to current challenges?

1.

Yes, we are working together on tomorrow's challenges

2.

Yep, we talk about being proactive but keep getting distracted

3.

Somewhat, but it is hard for some to accept compromise on their ideals

4.

We are struggling to get by and so haven't put effort into changing habits

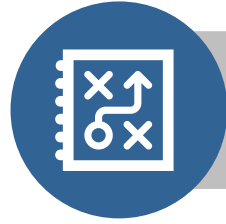
5.

Wait, this session is still about collaboration? Definitely, the wrong session!

The Framework



Framework for Engagement



Plans for Place



Resources for Service



Assessment for Stewardship

Business Variables

Embodied Debt

Risk Exposure

Future Program
Compatibility

Adaptability

Plans for Place

- Substantive alterations to program offerings and the space resources needed require leadership decision making with measurable outcomes.
- Ensure the alignment of critical campus planning voices for new space, existing space use and lessons learned from the pandemic.
- Competition in the marketplace is evolving and will require prioritization of your institution's offering to be sustainable.
- Ensure your institutional plan links today's realities with the institution's future state while maintaining flexibility and adaptability of response and associated circumstances.
- Assess those facilities that cannot or should not be sustained and map out a plan for their removal.

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Resources for Service

- Determine whether the planning and budgeting model presently in use is informing your future operating circumstances.
- Assess whether the use of your assets (buildings, technology, human resources) aligns with the evolving institutional program.
- Effectively maintain and operate your physical assets with an eye on successfully managing the risks they present.
- Establish an effective way to align space and program needs that includes a method(s) to manage space demands and use. Alter space use practice and needs to match evolving teaching and working practices.

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Assessment for Stewardship

- Identify the tools you are currently using or need to be using to measure success.
- Determine whether your plan is adaptable for multiple future scenarios or simply a vision/hope.
- Assess whether your facilities decisions going forward are a lagging investment and what action(s) you will take and/or the things you will stop doing.

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3 Through-Line Thoughts

What are you doing with what you know?

How do you know what you know?

What will, or should, you stop doing?



What's happening now???

Begin Again

Rethinking Phase II

- A new group has been meeting, starting late fall 2023.
- Developing examples, case studies and use cases for the framework elements
- We want you to contribute, too!

Discussion and Feedback...

or maybe

Today was a Fairy Tale



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[Rethinking the
Framework for
Collaboration
Whitepaper](#)

It's Time to Go

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This concludes The American Institute of Architects Continuing Education Systems Course