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# The Living Master Plan: Is it Possible?

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# LEARNING OBJECTIVES





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## Learning Objectives

- An open discussion to evaluate the merits of master planning approaches and determine what the future may hold.
- Reconsider the static master plan and seek to discover the art of the possible in a dynamic master plan.
- Confer and collaborate with other colleagues on the best approach to master planning in dealing with constant change and disruptions that have become our norm.



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# Poll Question



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## Poll Discussion

- Those that said yes...
  - When was it published?
  - Do you consider your campus “on plan”?
  - Key challenges you have found with remaining on plan.
- Those that said no...
  - Are you intending to do a master plan?
  - Is your master plan in the works?
  - Key challenges you anticipate with developing your master plan.



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## Set the Stage

- Exploring the future of master planning.
- We are presenting a potential concept/paradigm for discussion and evaluation. How do we do it? The answers are in our community.
- We want this to be an open discussion with...
  - Feedback
  - Critique
  - Strengths
  - Challenges
  - Pros
  - Cons
  - ...



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## Challenges with Current Methodology

- It is expensive. Typically involves architects, engineers, space planners, and other consultants to develop.
- It is time limited and static. Once it is complete, it may receive minor updates but, for the most part, it is fixed.
- It is not comprehensive. It only includes those things known to the planners at the time of the study.
- It is impossible to incorporate unknowns that arise without potentially going “off plan” or deferring campus needs.
- Redo the plan every 5 or 10 years depending on your cycle. These expenses then become reoccurring.



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## Other Considerations...

- Average length of service for a college or university president is 6.5 years. The plan will likely not be fulfilled in their tenure.
- The acceleration of technology has quickened to a pace of 5 to 7 years between disruptive technological advancements. A 10-year timeline would include technologies that haven't been invented yet.
- The plan horizon most likely includes element to be used by students that are presently in kindergarten.
- Teaching methodologies are evolving more rapidly than ever.





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# Evolution of Facility Condition Planning

No Planning

- Reactive, Unpredictable, Costly Downtime, Expensive Emergency Repairs

FCA

- Planned for the Future
- Limited horizon. Only included Knowns. Reoccurring. Expensive.

Life-Cycle

- Virtually unlimited horizon. One-time setup with annual updates. Included assets and systems that otherwise were just over the horizon.
- Potentially more administratively burdensome.



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# Evolution of Master Planning

No Master Plan

- Reactive. No future thought. Little to no strategic plan connection.
- Projects of opportunity. Conflicts with upcoming plans. Created sacrificial work.

Current Practice

- Strategic plan connection. Attempts to envision the future.
- Future is evolving too quickly.

Living Master Plan?

- Flexible. Dynamic. Living...
- But how do we do it???



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**We talked to your  
colleagues at the APPA  
Virtual Facilities Summit**



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## Questions we asked them...

- What are the key strengths of this kind of an approach?
- What internal challenges and external barriers would we need to overcome?
- If you were to try this on your campus, what objections, challenges, and other barriers might you encounter?



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## Some things they said...

Key Strengths	Internal Challenges & External Barriers	On Your Campus...
<ul style="list-style-type: none"><li>• Flexibility and future adaptation</li><li>• Intentional timeframe for refreshing the plan</li></ul>	<ul style="list-style-type: none"><li>• Pushback from CFO and future budget planning<ul style="list-style-type: none"><li>○ How can we sharpen up our cost projections?</li></ul></li><li>• Challenging to obtain budgets. Financial team needs time to get budgets approved and work through the political process.</li><li>• COVID has called into question what is needed.</li><li>• Long processes to get approval for buildings and other major capital projects.</li><li>• State requirements for master plans.</li><li>• Some townships require multi-year land-use plans.</li><li>• Cost to alter and update the plans.</li><li>• Refreshing the plan too often. May result in re-litigation.</li><li>• Consider the public affairs aspect.</li></ul>	<ul style="list-style-type: none"><li>• Revisit plans at the time of senior leadership changes.</li><li>• Plans and major updates on longer frequencies (i.e. 10 years) with more frequent minor refresh updates.</li><li>• Would need to have intentional vagueness.</li><li>• Would need to educate people on the power of a master plan.</li></ul>



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## Some things we have learned...

- There must be buy-in from senior leadership of the institution.
- There must be a tie-in to the strategic plan of the institution.
- There must be a tie-in to the campus recapitalization plan.
- The master plan cannot have infinite flexibility. There needs to be a “static” period in which there is time to secure funding, design, and deliver the projects.
- There need to be some “anchor projects” that guide the other aspects of the plan.
- Flexibility can be found in the details such as technology, utilization, function, etc.
- Regulatory requirements such as having a master plan, land use, and legislation will need to be considered as part of any framework.



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**We want to build upon that...**

- What would help you in understanding and implementing something like this?
- What key elements do you think should be included in a framework or guideline?
- What would you exclude in the framework as too granular or multi-faceted?



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## Breakout Session

- Discuss the questions
- Come up with three(ish) responses to report to the group
- Assign someone to be the voice for the group
- 10 minutes





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## Key Questions to Consider

- What are the key strengths of this kind of an approach?
- What internal challenges and external barriers would we need to overcome?
- If you were to try this on your campus, what objections, challenges, and other barriers might you encounter?

*10 Minutes*



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# What did we discuss?



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## Evaluation / Discussion

- Strengths of the concept
- Internal challenges within our operations
- External barriers to pursuing
- Campus-specific challenges



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## Next Steps with the Initiative

- *Facilities Manager* Magazine article on this topic published in the July/August issue
- Compile information from this discussion
- APPA CFaR Research Project (*being considered*)
- APPA Virtual Working Group team to explore
- If viable... eventually publish a standard, framework, or guideline for institutions to test drive and follow.
- **This is a long-haul initiative...**



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**If you have additional insight,  
questions, or want to get more  
involved in exploring this concept...**

Email us at...

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Thank you!  
Please don't forget to  
fill out the survey.

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