Solving Ongoing Change Permanently through Surge Buildings

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Agenda

• Factors for Success in Surge Space Planning
• Case Study – UW Condon Hall “Restore the Core”
• Case Study – UCSD Peppery Canyon Hall “Lean Mean Programming Machine”
• Case Study – Stanford University “Challenges in the Privates”
• Evaluating Success
Factors for Success in Surge Space Planning

What Are Your Surge Space Needs?

• Factors to Consider
• Long Term vs. Short Term Needs
• Objective Criteria to Aid Decision-Making
Managing Expectations

• Obtain Buy-In from Key Stakeholders
• Form the Right Team for Programming Decisions
• View the Facility as a “Campus Building”
• Understand the Differences between Traditional Facilities and Surge Space
Evaluating Surge Options

- New Building
- Existing Space Adapted for Reuse as Surge Space
- Owned/Leased Off-Site Facilities
- Owned/Leased Modular Buildings
Financing Surge Buildings

- Non-public funding
- State funding
- Donor opportunities
- Specific projects fund their own surge requirement
- 3rd party developer driven process
Surge Space Planning & Design

- This is a “Campus Building”
- Scenario Planning for Short- and Long-Term Needs
- Alternate Delivery Method
- Alternate Decision-Making Process
- Develop Appropriate Performance and Life-Cycle Assumptions
- Long-Range Planning as Part of The Initial Design Process
Restoring the Campus Core at The University of Washington

- The University of Washington is one of the oldest west coast campuses
- Founded in 1861
- Relocated to the present site in 1895
- 1909 Alaska-Yukon Pacific Exposition

The University of Washington Today

- > 40,000 students
- $6 billion physical plant
- 16,000,000 square feet
- No. 1 public university nationally in federal grants
Facilities Condition Index

- FACMAN Data Base prioritizes needs
- FCI = $ Cost of Repairs
  Current Replacement Value (CRV)
- > 100% FACI Places Buildings on the “Critical Building List”
- Some of These are “Duisenbergs” that should be restored
- Needs Index Model

University of Washington Condon Hall
“Restoring The Core”
Critical Building List

• Historic buildings outmoded for modern instructional needs
• 15 buildings placed on “Critical Buildings List”
• Average age 88 years: each with an FCI near or above 100%
University of Washington Condon Hall
“Restoring The Core”

Restoring the Core
• Critical buildings contain ¼ of general assignment classrooms
• 1,000,000 GSF +/-
• 30,000 students receive instruction in at least one of the these buildings per quarter
• 10% of non-self-sustaining space at University of Washington
Beautiful Buildings in Need of Renewal

- Renovation costs exceed replacement, but . . .
- Completely decanting the building makes it cost effective
- They are an integral part of campus fabric and history
- Until recently, we have been unable to vacate them, for major renovation
Condon Hall – Key to the Surge Space Plan

- New Law School opening allowed for Condon Hall to be used as surge space
- First building to be used exclusively as surge space for other projects
- 82,000 asf available, but how best to invest
- Develop prioritized list of critical buildings to be renovated
- How to get campus buy-in for this process?
Planning Assumptions Saved Time and Conflict

- Buildings assumed to be renovated for use by current occupants; no major program changes
- “Landlord Approach” – Condon Hall fitted out for “generic” users
- Investments made in basic building program
- Law library divided into classrooms
- Office space used mostly “as is”
- No wet lab uses
Weighted Criteria Matrix

- Ad Hoc Restoration Planning Committee, Division Dean of Arts and Sciences as Chair
- Included faculty, students and planning / facilities staff
- With outside help, developed “Weighted Criteria Matrix”
- Buildings evaluated using criteria for:
  - Life Safety – Seismic, fire protection
  - Building Condition – overall condition from good – poor, FCI %, accessibility, occupant load
  - Building Use Criteria – programs, research, classrooms, offices, program displacement
**Fit Planning**

- Each project assessed for its ability to use Condon Hall as temporary surge space
- All but three were determined to be capable of this
  - MHSC H-Wing
  - Playhouse Theater
  - Brooklyn Building
University of Washington Condon Hall
“Restoring The Core”

Lessons Learned

• “Restore the Core” – keeping parents, students, legislators and others involved
• “Brand Name Recognition” enabled state funding for formerly unfundable projects
• Framework for interim capital investment decisions
• Project Agreements confirm scope, schedule, budget and plan for space loss or trades
• Website keeps tenants informed of decisions
• Hire a move coordinator early on
• Classroom coordination and communications planning is essential
• Post occupancy reviews add to “lessons learned”
UC San Diego, Pepper Canyon Hall
“Lean Mean Operating Machine”

**Surge Building Drivers**

- 35% enrollment growth 2002 – 2010
- Commensurate growth in core staff
- Redevelopment of University Center/Sixth College Neighborhoods
  - 61,000 asf temporarily displaced
- Significant shortfalls in classroom seats
  - Must be funded from non-State sources
- New program initiatives –
  - Sixth College,
  - Rady School of Management,
  - School of Pharmacy
UC San Diego, Pepper Canyon Hall
“Lean Mean Operating Machine”

Typical Planning Process

• Locally developed space guidelines
• Triennial survey of campus space needs
• Updated Administrative Space Management Plan
• Annual presentation of capital improvement needs by each Vice Chancellorial area to COSAC
• COSAC establishes Capital Improvement Program priorities

05 – 09 Capital Improvement Plan
Building Planning Process - Typical

- Chancellor establishes building Advisory Committee (BAC)
- BAC membership includes:
  - Chair – Dean/Executive Administrator
  - Academic Senate
  - Student & Graduate Student
  - user Group Representation
  - Planning & Facilities Staff
- BAC responsibilities include:
  - Architect selection
  - Space plan development
  - Site selection
  - Design and approve final document submittals
- 4 year average time fram
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Lessons Learned from UCR’s Surge Building

• Use an alternate planning/design process
• Minimize user group involvment
• Develop program early and don’t change midstream
• Facilitate user group buy-in to different process before starting
• Plan ahead!
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Building Planning Process – Surge Building
• 70,500 asf project space deficit in 2002 Space Management Plan
• Findings/solution options presented to Chancellor’s Council
• CC requests a space/funding model for new surge project
• Model approved by Chancellor in March ’02
• Alternate delivery method approved to allow for occupancy 13 months faster than typical process.
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Building Planning Process – Surge Building

- April ’02 – Site selection
- April ’02 - “Lean & Mean” BAC is appointed
  - Chair, Assoc. Vice Chancellor Academic Planning
  - Academic Senate representatives
  - Planning/Facilities Staff
  - User occupant
- BAC managed expectations to control budget
- Rapid decision-making process facilitated fast schedule
- August ’04 – Building occupied
- Planning – occupancy – 2 ½ years
Building Planning Process – Surge Building

- Design that allows for long-term flexibility
- Neighborhood plan revisited to accommodate different use, but still meet its overall goals
- New long-term home for Sixth College Administration that is welcoming and friendly
- Addition of need instructional space (750 seats) in University Center
- Building that is a good neighbor to planned developments
UC San Diego, Pepper Canyon Hall
“Lean Mean Operating Machine”

Lessons Learned

• Regular review of space needs and capital plans facilitated consensus
• Strong leadership provided guidance to lead the process
• BAC - small, meet often and include a few “tenants”
• BAC - rely on advice of experienced consultants
• Alternate delivery method works with buy-in
• Renting space forces departments to tighten their needs
• Enabled successful launch of the Rady School of Management
• Saved $2,000,000 in construction/renovation costs
Stanford University
“Project by Project Surge”

Current Surge Strategy
• Campus history of surge projects
• Current planning context
• Square footage constraints
• Costs and funding sources
History of Surge Projects

- 1989 Loma-Prieta Earthquake impacts required additional modular units
- University used modulars for surge space before
- Problems with modular surge space
  - Started as temporary replacement
  - These become permanent for administrative groups
  - Evolved into dated facilities in poor condition
- Attempts at permanent surge facilities rarely worked
Current Planning Context

- Projects ebb and flow as funding allows
- Capital plan does show a predictable series of renovation projects
- Projects planned on a school-by-school case
Square Footage Constraints

- General Use Permit (GUP)
  - Stanford is allowed to build 2,000,000 gsf of new construction
  - Current sf (incl. medical school) is 15,000,000 gsf
  - Have an allocation of 15,000 gsf for modular units

- How to justify new surge construction with limited allowable buildable area when alternate is to link surge with projects that come and go
Funding Sources

• How to justify University funds to build surge facilities instead of funding defined user buildings
Where Do We Go From Here

- Problems with current approach:
  - High cost of over-customized surge projects
  - Pitfalls of modulars
Stanford University
“Project by Project Surge”

Where Do We Go From Here

- Positives with current approach:
  - Each project “pays its own way”
  - GUP allowable area isn’t used for surge buildings
Where Do We Go From Here

- Alternatives to the current approach
  - Develop centralized surge space
  - Coordinate project schedules and funding sources
Evaluating the Success of Surge Projects

What Does Success Look Like?

• Be strategic from the beginning
• Identify drivers for surge space
• Understand short- and long-term needs
• Manage realistic expectations
• Plan for generic “campus” building
• Plan for flexibility
• Review alternate delivery methods that streamline the process, schedule and costs