

# facility master plan

PROTECTING AND LEVERAGING YOUR GREATEST ASSET

by Steve Kimball



## what is a facility master plan?

A Facility Master Plan is a long-term roadmap that aligns an organization's buildings and infrastructure with its strategic goals and vision. It is an essential tool for leadership to evaluate facility conditions, to determine current and future needs, and to prioritize capital investment.

## the importance of a facility master plan

The international Facility Management Association defines it as "a plan that sets strategic facility goals based on the organization's strategic (business) objectives. The strategic goals, in turn, determine short-term tactical plans, including prioritization of, and funding for annual facility related projects."

Facilities master planning is one of the most critical steps when creating an efficient, cost-effective facility that maximizes workflow, space economy, flexibility for future growth, and change. It is often one of the most overlooked steps in facilities project planning. Many organizations fail to recognize the importance of facilities master planning and choose to "skip" this critical step based on time and cost.

Workplace planning considerations are seeing significant change as we emerge from the COVID pandemic, elevating the importance of a strategic facility master plan. Increasing demands for healthy workplaces, flexible work styles, remote work capabilities, and enhanced collaboration—along with the need to attract and retain talent through technology—are placing renewed emphasis on facilities master planning.

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## the goals of a facility master plan

The goals of a facility master plan are tailored to the requirements of individual organizations. The process begins by defining specific goals that should incorporate and reflect some of the following common topics:

- Leadership Initiatives
- Workforce Considerations
- Quality Expectations & Requirements
- Function & Workflow
- Image / Brand
- Investment
- Timing / Phasing



## the framework for a successful plan

The facility master plan establishes a clear framework for developing a successful, site-specific strategy that integrates program elements, existing conditions, and supporting infrastructure systems. The process begins by:

- Defining specific goals that reflect the desired result.
- Identifying key stakeholders to ensure alignment.
- Incorporating an existing facility audit.
- Assembling all pertinent organization information in advance.



## information required to begin the planning process

Distributing of the following information to the facility master plan team prior to project kickoff is essential for ensuring an organized and productive start to the project.

### CORE VALUES STATEMENT

Provide the organization's current Core Values statement with commentary as appropriate. For organizations without a formal Core Values Statement, use a summary of organizational priorities that drive the desired culture.

### CURRENT STRATEGIC PLAN

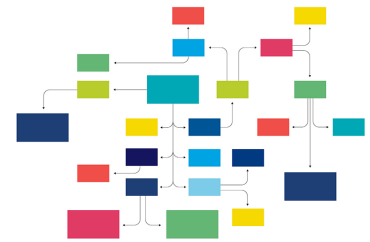
Provide the organization's current Strategic Plan, commenting where appropriate.



## ORGANIZATION INFORMATION

Provide pertinent organizational information, which includes the following:

- Design Standards
- Brand Guidelines
- Number of Employees
- Organization Chart
- Internal Departments and Number of Employees in Each
- Departmental Adjacency Requirements
- Completed Program Data Sheets
- Emergency Power and Redundancy Utility Requirements
- Facility Utility Capacities
- Service Entrance Locations
- MEP Systems Information
- Occupancy / Operating Hours
- Security Requirements
- Furniture Standards and Workstation Sizes
- Storage Requirements by Department
- Existing Building Drawings
- Maintenance Records
- Parking Requirements
- Organization-specific Special Requirements



## process

**Key elements of a comprehensive facility master plan process include:**

- Collect and distribute key client and facility information.
- Conducting a site investigation.
- Facility audit and assessment.
- Kick-off meeting to establish key stakeholders, goals, objectives, and tasks.
- Department interviews including leadership.
- Maintenance staff meeting.
- Planning / Charette sessions (typically 2 to 5).
- Present a draft facility master plan, including executive summary.
- Leadership draft master plan prioritization and decision making.
- Present a final facility master plan, including executive summary.
- Delivery of Master Plan Report.



## outcome

The facility master plan should provide an “actionable” plan that is the basis for development of a statement of work and scope of services. This “road map” will outline information for leadership use in development of next steps to move forward with a capital plan complete with timeline, phasing requirements (if required), and budget considerations (construction, equipment, owner furnished items, and soft costs).

### Typical Bound Final Facilities Master Plan Report include the following:

- Executive Summary
- Participant List
- General Requirements & Recommendations
- HVAC, MEP, Telecommunications & Special Systems Narrative
- Facility Assessment Report / Audit
- Code Analysis
- Phasing Narrative
- Pros / Cons of Renovation vs. New Build
- Program Data Sheets
- Programming Excel Spreadsheet
- Special Considerations / Equipment Matrix
- Concept Floor Plans
- Concept Construction Cost Estimate
- Design and Construction Schedule
- Action Item List
- Project Meeting / Correspondence Documentation
- Appendices (supporting documents)





## project example

A comprehensive facility master plan prepared by emersion DESIGN for a 177,000 SF academic facility at the University of Cincinnati provided a detailed and organized strategy for a 6-phase, multi-year renovation.

A key objective of the facilities master plan was to align capital improvement priorities with campus physical, academic, and budget goals in a coordinated and complementary way.

The University's goals and objectives were to provide classrooms, offices, instructional and research science laboratories, broadcast studios, community spaces, conferencing, and lounge spaces to support current and future active learning requirements. These goals have been realized through the first four renovation phases as a direct result of the facility master plan and utilizing it as the roadmap to implement the long-term vision for this critical academic asset.

Beyond achieving the University's academic goals and objectives, Phases One through Four were completed with a bid cost differential of under 1.0% and total change orders of only 6.4%, including University-requested modifications.

With just two phases remaining, the project is well on its way to academic and financial success.

## about the author



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Steve is a co-founder of emersion DESIGN and the Science & Technology Client Leader. He has managed over \$1 Billion in construction projects with expertise in specialized facilities including laboratories, research and development, highly secure buildings, advanced manufacturing, and innovation district master plans. His leadership propels emersion to fulfill its mission — to advance clients who advance society.

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