Campus Master Planning Guidelines

The University of Texas System

Office of Facilities Planning and Construction

Foreword

The ***Campus Master Planning Guidelines*** is a tool to aid the campuses of The University of Texas System in planning, documenting and communicating the Campus Master Plan to stakeholders and administrators.

All attempts have been made to develop flexible Guidelines that will not increase reporting requirements.

Acknowledgements

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Document Purpose

The Board of Regents of The University of Texas System desires that each campus have a simple and meaningful Campus Master Plan that can be approved by The University of Texas System Board of Regents.

As the institutions begin the process of campus master planning, The Board of Regents desires accurate and consistent planning information to facilitate the approval process.

Other benefits from the Guidelines will be:

- The UT System and Texas Higher Education Coordinating Board (THECB) can be provided consistent planning information.
- Interested parties have an early opportunity to provide input and discuss issues in a collaborative environment.
- Consensus can be obtained and planning needs can be converted into specific requirements before undertaking the campus master plan.
- Provides a starting point for identifying the scope of the planning effort which will also be beneficial when determining whether consultants are needed to assist in the process.

ii Introduction

A Campus Master Plan is a comprehensive and collaborative process of gathering, collecting, analyzing, synthesizing and documenting requirements to acquire, develop or improve land, a campus, or a campus precinct through a long-range plan that balances and harmonizes all affected elements to support the strategic mission of the Institution and the growth required in enrollment, programs and facility support.

A Campus Master Plan can require considerable time and financial resources to complete. The Campus should plan for the necessary time commitment and appropriately budget funds to cover the cost of the Campus Master Plan and periodic updates.

The Campus Master Plan should be consistent with and firmly rooted in the Campus' Strategic Plan. It should also address land-use and infrastructure needs which may be beyond the Campus' Strategic Plan.

There should be a relationship between the projects that are identified by the Campus Master Plan and those projects submitted for inclusion in the UT System Capital Improvement Program (CIP).

The Benefits of a Campus Master Plan

A Campus Master Plan:

- Develops consensus on sound guiding principles while balancing the visionary with the realistic.
- Allows the campus to direct its growth so that every dollar spent improving the physical campus supports the campus mission.
- Is responsive to internal and external influences extant now and anticipates mid and long-term impacts.
- Provides for collaboration and communication that has a positive impact on the strategic forces that dictate the vision and mission of the campus.
- Identifies funding strategies, planning and demographic parameters that inform future development decisions.
- Is comprehensive and serves a specific purpose, and,
- Is desirably flexible to meet changing academic and planning demands.

The Planning Process

These guidelines are a tool to prepare a Campus Master Plan that requires internal approval at the Campus level and approval by the Board of Regents. The Board of Regents recognizes that the institutions may hire outside consultants to assist them in preparing the Campus Master Plan. OFPC is available to assist the institutions through each step of the Campus Master Planning process and institutions are encouraged to invite them to participate.

Each institution is unique. These guidelines cannot be applied equally across all UT System institutions. The guidelines are intended to complement each institution's significant knowledge and to complement the chosen approach that produces a document that provides a specific and achievable roadmap to campus growth.

Campus Master Plan Updates

The plan may include recommendations for the frequency at which it might be updated or major events that might trigger an update, including for example:

- A significant change in institution leadership (e.g., a new President)
- A significant change in institution mission/direction
- A major physical addition to the campus or a new satellite campus
- A major change that is inconsistent with the currently approved campus master plan

Campus Master Plan Timeframe

The Campus should determine the useful life of the document prior to beginning the Campus Master Plan process. A reasonable timeframe for most campus master plans is a 10 – 20 year planning horizon, but the Campus should decide what is appropriate based on its knowledge of campus requirements and the findings of the Campus' Strategic Plan.

The Executive Vice Chancellor should receive a progress update (if changes have been made) or periodic report (if no significant changes have occurred) not less than every five (5) years.

1 Getting Started

The following six steps will help the campus get started with the planning process:

1.1 Pre-Planning Meeting

The Campus Administration (including President, VP's, Dean's, etc., or as agreed to by the Executive Vice Chancellor) should have a Pre-planning Meeting with the Executive Vice Chancellor to discuss the campus' strategic direction and the intent to initiate or update the Campus Master Plan.

1.2 Management Team

The campus President should appoint an oversight/steering committee or management team (or any name deemed appropriate – hereafter referred to as an "oversight team"). The oversight team will provide strategic direction and accountability.

1.3 Campus Master Plan Team

A Campus may use internal staff and/or external consultants to complete its Campus Master Plan; this decision should be made early in the master planning process. If an institution uses external consultants, OFPC can assist with the procurement process.

1.4 Campus Master Plan Schedule

A schedule for the process should be prepared which identifies the tasks to be completed, who is responsible for each task, and when the tasks need to be completed.

1.5 Participants

Identify the participants to be involved. Typical participants might include representatives from campus administration, campus colleges and departments, campus operations and maintenance, auxiliary enterprises, community stakeholders including public and private partners, student groups, etc. The UT System Office of Facilities Planning and Construction (OFPC) and Real Estate Office are available to assist in the process.

1.6 Decision Authority

Identify who is responsible for each action and who has the authority to approve information and make each decision.

Typical Reference Materials

Various types of information should be gathered prior to starting a campus master plan.

Some of the information may already exist in the form of campus documentation or in the form of reporting requirements to the Texas Higher Education Coordinating Board (THECB), the UT System Administration or the UT System Board of Regents.

The intent of this Guideline is to capitalize on available information and not to create new information requirements.

The following items may be helpful if taken into account prior to starting the campus master plan:

1.7 Campus Vision

Provide Campus Vision including scholarly pursuit, campus life, recruitment, programs of distinction and capital growth/fundraising.

1.8 Campus Mission Statement

Insert Campus Mission Statement (which could be in the form of Academic Plan, Strategic Plan or strategic planning priorities) that affirms the Campus' commitment to its primary objectives.

1.9 Guiding Principles

This section addresses typical information most campuses use in marketing their campus and instructional/research program and could include physical attributes, reputation, natural spaces, campus and community activity and any items that make the campus unique.

1.10 Strategic and Facility Planning

Some of the items below may already be generated by Campus, may be reported to the University of Texas System and may aid the planning process:

- Strategic Plan and/or Campus Compact
- Operating or Business Plan (6-year Forecast)
- Existing Demographics
- Projected Growth and Demographics
- Real Estate Holdings and Acquisitions
- Capital Renewal/Deferred Maintenance
- Classroom and Class Lab Utilization Rates

- Space Projection Model on file with the THECB
- Building condition assessment and use
- Utility infrastructure information
- Deferred maintenance report

1.11 Prior Campus Master Plans

2 Plan Content

The following includes topics that are the template for creating a campus master plan. It is possible that not all of these topics are germane to each campus – however it does represent information generally included in campus master plans. Emphasis should be placed on the key elements that drive the growth of the campus, whether that is growth in student population, patient care or research activities.

Background Information

2.1 Executive Summary

The executive summary should present the essence of the campus master plan.

2.2 Introduction

Provide brief explanation of what went into developing the campus master plan.

2.3 Campus History

Consider including a brief history of the university and of the history of the campus, including prior Campus Master Plans completed.

2.4 Guiding Principles

Provide guiding principles and develop a set of measurable goals and objectives based on the Institution's Strategic Plan.

2.5 Campus Character, Special Attributes and Places

Describe elements that contribute to the specialness of the campus including culturally, historically, or architecturally significant areas or items. Consider addressing open space and landscaping preferences.

2.6 Residence Life and Campus Housing

Describe current campus life facilities and how they support student enrollment, student retention, and residence life.

2.7 Sustainability

Describe the university's strategy related to sustainability and the relationship of the university's Sustainability Plan to the campus master plan.

Programmatic Planning

2.8 Academic/Research/Healthcare

Consider providing academic programmatic data to address undergraduate, graduate and doctorate space requirements. State any projected changes or advances in instruction, demand or academic programs.

Address the role of research and/or healthcare planning and delivery in the institution.

2.9 Demographics

Consider providing demographic data for current student body or patient population and any anticipated demographic changes proposed or needed to meet projected enrollment or changes in patient volume or number of Principal Investigators.

2.10 Enrollment Projections

Consider projecting future enrollment over the life of the master plan including existing and new majors for undergraduate, graduate, PhD and Post-doctoral.

Address changes that may affect retention and any changes in key ratios, such as student-to-faculty, faculty to class size, distance learning, and support (i.e., housing) etc.

2.11 Space Projection Model

Consider addressing how to accommodate space needs growth related to new programs or initiatives (academic, research or health) while utilizing existing facilities and improving functionality and efficiency.

2.12 Classroom and Lab Utilization

Consider quantifying utilization targets when projecting the demand for space and possibly addressing the amount of time classrooms and labs should be used each day and whether to change the target utilization.

2.13 Non-Academic Facilities Planning

Consider providing facility information for non-academic, quasi-academic auxiliary and support facilities including wellness, recreation and athletics, performing arts and student support facilities (Student Center and Student Services), parking garages, equipment and storage buildings, central thermal plants, maintenance warehouses, athletic out-buildings.

2.14 Future Land Acquisitions

Consider whether any of the foregoing data indicate the need for future land acquisitions and, if so, whether there are opportunities for future acquisitions in appropriate locations.

Connectivity and Linkages

2.15 Campus Boundary (Physical)

Consider providing information about changes to the campus' boundary including potential acquisitions and disposition of owned property to facilitate a definitive campus edge, development and growth, and a stronger sense of arrival. Consider defining a potential campus boundary.

2.16 Campus Edge, Relationships and Community Connectivity

Consider describing how adjacent community and business relationships affect the future of the university and how the local community can help the university to achieve the master plan goals.

2.17 Transportation Interface

Consider providing information describing the transportation systems (motorized and non-motorized vehicles, public and private transit, pedestrian and parking systems) including existing roads, transit, buses and shuttles, bicycles, and pedestrian ways that provide access to and from the campus and any proposed improvements to public and University-provided transit service and facilities.

Infrastructure Considerations

2.18 Provision and Condition

Consider including utility and technology infrastructure information including acquisition, continuing service and expansion, and maintenance for all services. Consider defining current state of repair, life-cycle status, capital renewal issues, and reliability.

Consider providing any additional quantity needs, quality of service issues, practical limitations and alternate methods of service or capacity, with long-term build-out in mind.

2.19 Planning and Coordination

Consider developing a coordination document with proposed building areas and utility corridors including main distribution or collection lines, major features and equipment, easements and right-of-ways. Consider discussing energy conservation measures.

Architectural Design Standards

2.20 Architectural Attributes

Consider defining architectural attributes and values that reflect the campus heritage including significant architecture, special settings or places and historic features.

2.21 New construction, renovations and additions

Determine to what degree any new building, renovation or addition will comply with the Architectural Design Guidelines for the campus.

2.22 Building Composition

Consider providing specific guidelines for new buildings or additions that address building height, setbacks, building spacing and dimensional separations, density, and building footprint types.

Consider providing specific guidelines for windows and openings, vertical composition, special instances for entrances and building accessories.

2.23 Materials

Consider defining any special material requirements including roofs, exterior walls, doors and windows and whether there is a predominant or specific building exterior material (product or application) to be used throughout the campus.

2.24 Way finding and Campus Signage

Consider developing an overall plan for directional and building signage including locations, types and attachment support and connections.

2.25 Exterior Standards

Site Furniture (benches, trash receptacles, bicycle racks, bulletin boards, and electronic kiosks) and hardscape items (sign systems, paving materials, and lighting components) should be considered on a campus-wide basis and encompass the aesthetic and functional context in which individual projects will be developed.

2.26 Screening

Provide considerations for aesthetics, accessibility by heavy trucks, safety, and security, for loading docks, dumpsters, and outdoor equipment. These may apply to enclosures for courtyards and small storage buildings as well.

2.27 Security and Risk Mitigation

Consider providing security and risk mitigation principles and possibly address the physical provisions for safety and security through coordination with other campus entities if no campus-wide security plan exists.

Implementation Considerations

2.28 Existing (Current) Campus Plan

If a current Campus Master Plan exists, it could be used to determine what is correct and useful and what should be changed.

2.29 Full Build-out of Proposed Facilities

Consider providing documentation showing what the full build-out of campus facilities might look like.

2.30 Implementation Plan or Phasing Action Plans (Optional)

Consider whether the campus wants to provide an implementation timeline to show a possible order or prioritization of proposed facility build-out and whether phasing plans will be provided.

2.31 Cost estimates (Optional)

Consider whether the Institution is willing to provide conceptual cost estimates for any build-out for the campus master plan, either by phase, priority or building type. Cost estimates are generally unreliable at the campus planning phase since buildings are undefined and construction market conditions can vary significantly.

Appendices

The Appendix may include any documents or exhibits that are referenced or used as a part of the campus master plan. Examples include any environmental studies, traffic or parking studies, demographic information, space utilization information, facility condition assessments, and any other relevant report information provided to the University of Texas System or the Texas Higher Education Coordinating Board.

3 Final Steps

The final step in the planning process is approval by the UT System Board of Regents.

This final step requires that certain administrative activities be completed and that a review and presentation process be conducted with UT System Executive Officers and staff leading up to the presentation of the plan to the Board.

Activity Timeline for Final Steps

The following activities should occur within the recommended timeline:

1. Approximately three months prior to the Board Meeting (and prior to the deadline established by the Board Office) a President's letter will be submitted by the institution to the appropriate Executive Vice Chancellor (Academic Affairs of Health Affairs) requesting that the Campus Master Plan be placed on the Board agenda for approval. This letter will signify that the Campus has met the obligation of having a Pre-planning Meeting and that the content and direction of the Campus Master Plan is consistent with the information discussed and direction provided in the Pre-planning Meeting and that the Campus Master Plan has, been tied to the Campus Strategic Plan.
2. Three months prior to the Board meeting, the institution sends copies of the completed Campus Master Plan for review, typically to:
    a. One copy to the appropriate Executive Vice Chancellor (EVC)
    b. One copy to the Office of Real Estate
    c. One copy to the Office of Business Affairs – Finance
    d. Two copies to OFPC (RPM/SPM, AVC/ED-PM)
3. Ten weeks prior to the Board meeting, the institution forwards an electronic version of the draft PowerPoint presentation and an executive summary to the above offices.
4. Eight weeks prior to the Board meeting, the institution's representative presents a dry run of the presentation to interested parties, including the Chancellor, EVC-HA/AA, EVC-BA, ED-REO, AVC-OFPC.

OFPC will coordinate the meeting upon notice from the campus that the representative is prepared. Additional campus representatives at the dry run should include, as a minimum, the Chief Business Officer and the campus planning officer. The presentation should typically be scheduled for 15 minutes with 5 minutes for questions and should include an overview of the planning process undertaken and the major findings of the plan. OFPC will provide a template of the items to be addressed in the presentation.

5. Seven weeks prior to the Board meeting, the institution refines the presentation and re-submits the final electronic version as above for inclusion in the Board Agenda Book by either the Office of Health Affairs or the Office of Academic Affairs, as appropriate.
6. The Office of Academic Affairs will brief the Board Academic Affairs Committee or the Office of Health Affairs will brief the Health Affairs Committee Chairman (and possibly other interested Regents) over the next 2-3 weeks.
7. The plan is presented to the Board of Regents' Academic Affairs Committee or Health Affairs Committee for approval.