Presentation Outline

• Role of Main Planning Documents
• Other Strategic Documents
• Project Implementation and Governance
• Board Approval and Reporting
• Organizational Structure of Facilities and Operations
• CCIS Overview
Role of Planning Documents

There are three key guiding documents that are primarily used to aid Facilities and Operations in accommodating the growth of the university and the changing needs for program delivery:

- Long-Range Development Plan
- Sector Plan(s)
- Business Case(s)
Long-Range Development Plan (LRDP) (Board Approval Required)

- Provides a planning framework to accommodate and guide physical development on University lands over a 30+ year time frame.
- It responds to the Comprehensive Institutional Plan, which sets the academic and research goals for the institution.
- Outlines high-level, strategic planning principles that are to be followed as development proceeds.
- It is not a building plan, but a road map that guides future planning and design of specific areas and/or buildings as opportunities arise, ensuring that the University’s aspirations and goals are met.
LRDP Planning Elements

- Land Use Patterns
- Transportation: Vehicles and Transit
- Parking
- Pedestrian and Bicycle Access and Circulation
- Facilities and Built Form
- Open Space and Landmarks
- Gateways and Way-Finding
- Support Infrastructure
- Environment

There are extensive strategies, initiatives, & guidelines established for each planning element.

http://www.communityrelations.ualberta.ca/lrdp.cfm
South Campus 30-Year Concept Plan (2002 LRDP)
Sector Plans  
(Facilities Development Committee approval required)

• Using the LRDP as the framework, Sector Plans provide the next level of detail of an integrated land use plan.

• Land use is further refined with the identification of pathways, open spaces, nodes, circulation routes, and development zones.

• Like the LRDP, development zones represent where a building is to be located, not the actual building.

• Development zones will contain connecting elements (landscape, paths, services) to major site elements.

• Build-out concepts are developed to verify massing and that the planned growth/program can be accommodated within the prescribed guidelines.
South Campus Draft Sector Plan (2010/2011)
Business Case
(Executive Planning Committee approval required)

• Outlines the need for a new/repurposed building and is tied to the General Space Programs for the respective Faculty and/or Administration Units.

• Provides the institution and Government with strategic information such as: strategic alignment, operational benefits, program risks, and a cost benefit analysis.

• Outlines the program that will be accommodated, the scale of the building, its budget, funding sources, and respective lights-on-funding requirements.

• Sets in motion the funding request to Government.
Other Strategic Documents

- Comprehensive Institutional Plan (CIP) (broad University governance)
- General Space Program (FDC approval)
- Portfolio reports shared with Government:
  - Capital Plan (embedded w/in CIP)
  - BLIMS and IMP
  - 10 Year Deferred Maintenance Plan
  - Energy Management Program
  - Utilities Master Plan
  - Residence Master Plan
  - Residence White Paper
Project Implementation and Governance

Purpose

• Align with mission, vision, mandate of the UofA
• Meet approved goals, institutional priorities, budgets, and schedules
• Develop space effectively and responsibly with clear lines of accountability
• Project controls utilized to minimize and manage risk accordingly

General Project Phases

• Project Assessment
• Project Definition
• Documentation
• Implementation
• Feedback
Capital Projects Process - Summary

**Project Assessment**
- Develop the vision
- Assess the need
- Develop the project scope
- Develop project administration
- Project delivery strategy
- Financial resources strategy

**Project Definition**
- Confirm the project scope
- Schematic design
- Design development
- Refine project cost
- Report on funding

**Documentation**
- Contract documents
- Working drawings
- Specifications
- Confirm funding
- Pre-tender estimate

**Implementation**
- Tender
- Construction
- Change
- Warranty
- As-Bults

**Feedback**
- Occupancy
- Post-Occupancy review - facilities
- Post-Project review - team & process
Wrap Up

Any Questions?