

Integrated Planning

What?

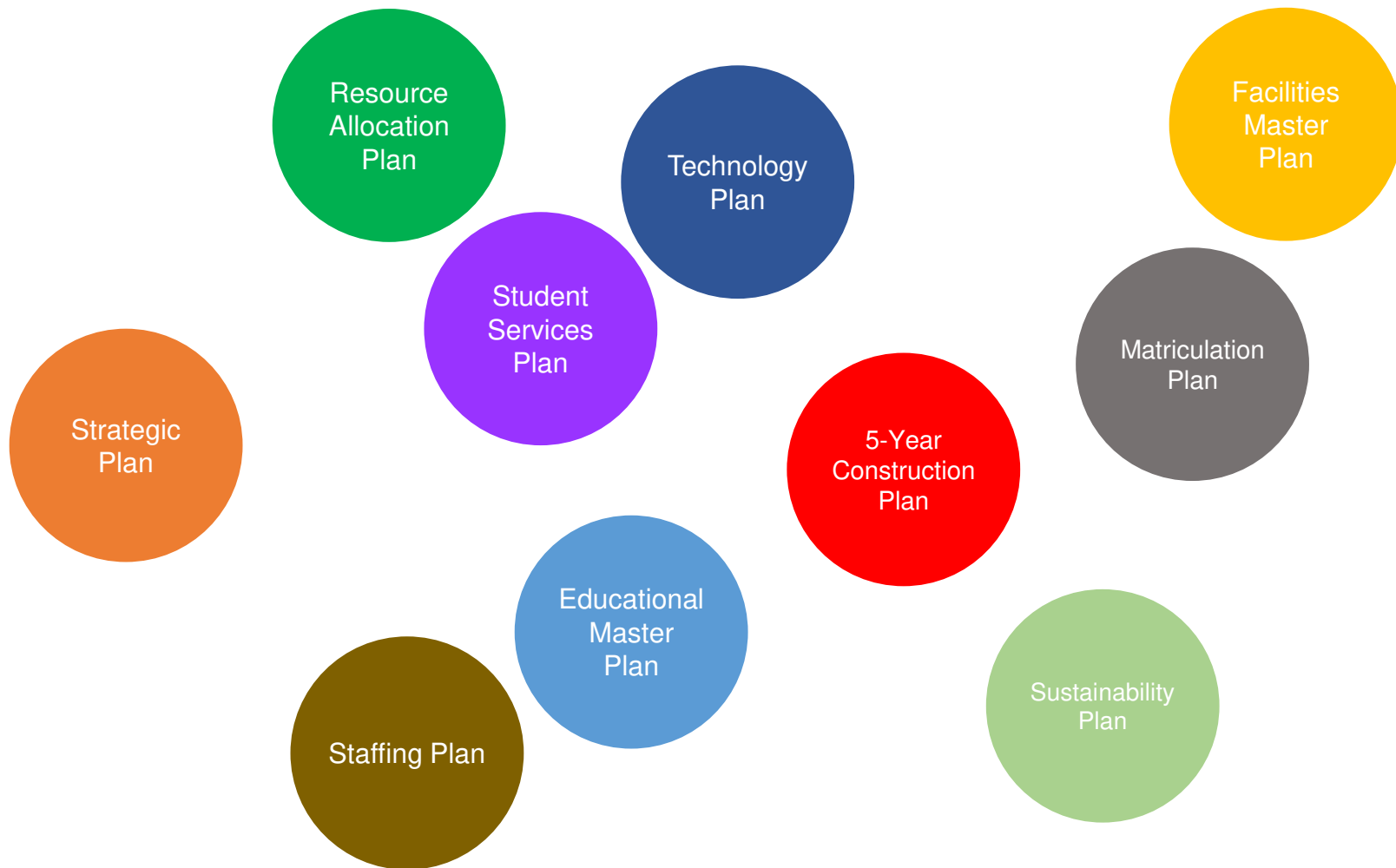
DEFINITION

Integrated planning (IP) is the process whereby all planning and resource allocation activities throughout every level of the organization **are effectively linked and coordinated**, and driven by the institution's vision, mission, and academic priorities.

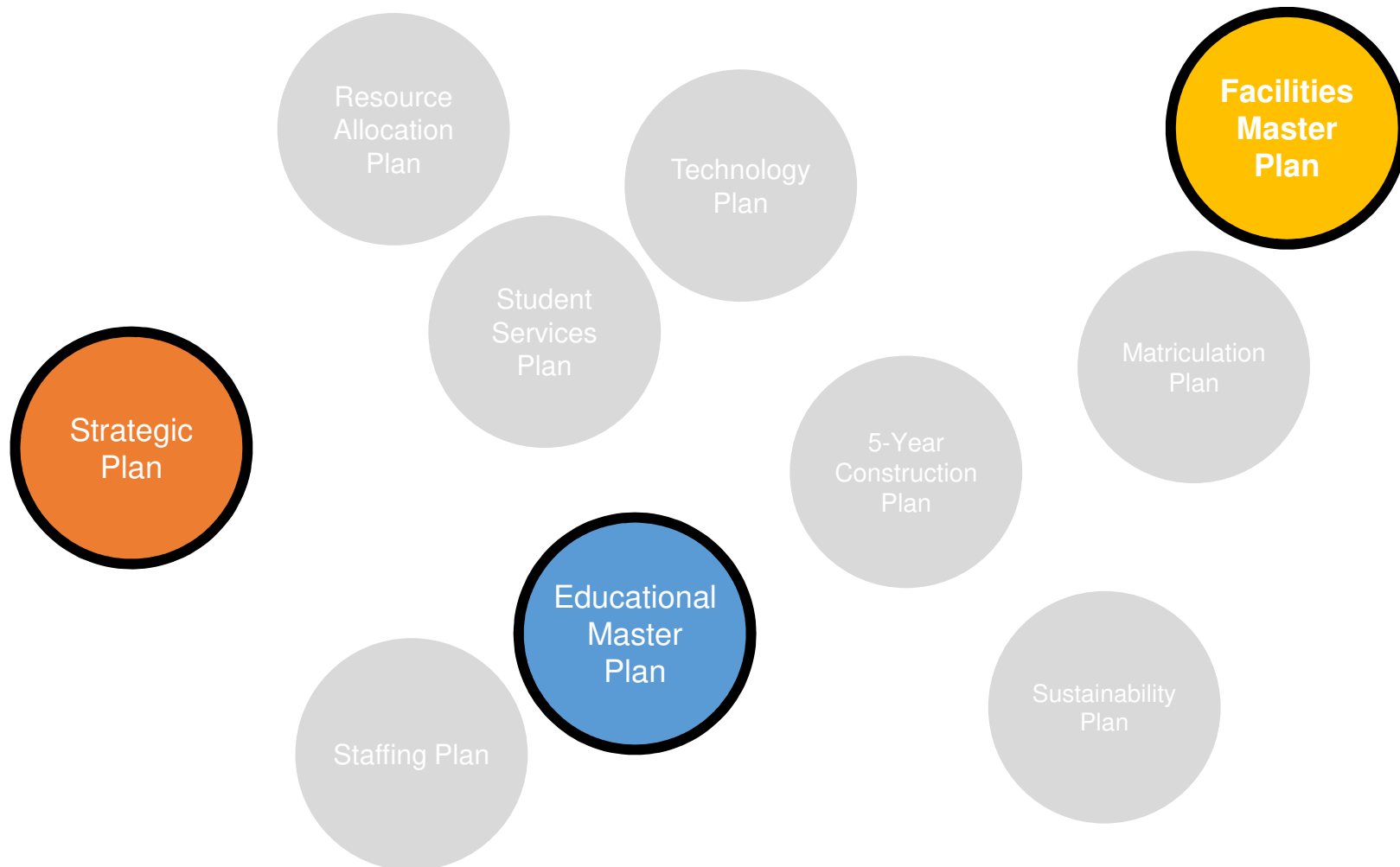


**SCUP, Society for College and
University Planning**

Where?



Where?



Accreditation

Standard I

Mission, Academic Quality and Institutional Effectiveness, and Integrity

Standard II

Student Learning Programs and Services

Standard III

Resources

Standard IV

Leadership and Governance

Accreditation



I.
**Mission &
Institutional
Effectiveness**

II.
**Student Learning
Programs &
Services**

III.
Resources

IV.
**Leadership &
Governance**

Accreditation



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Accreditation



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Focus

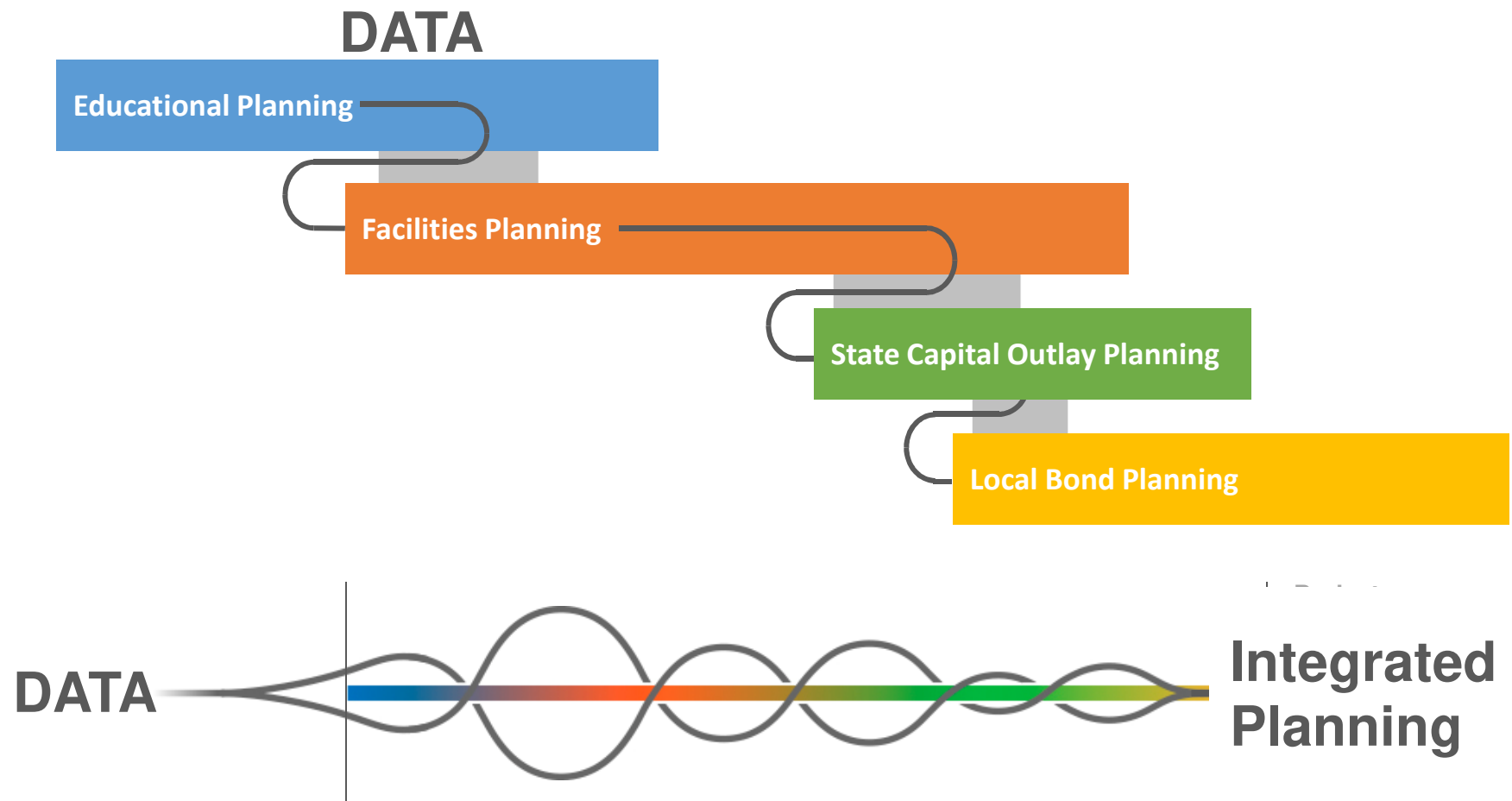
Educational Planning

Facilities Planning

State Capital Outlay Planning

Local Bond Planning

How?



Integrated **Facilities** **Planning**

Facilities Planning

KEY DATA ELEMENTS

- Enrollment Forecasts
- WSCH forecasts by program
- Space Inventory
- Facilities Condition Index
- Capacity Load Ratios

DATA

Enrollment + WSCH Forecasts

2015 Long Range Enrollment and WSCH Forecast

	A	B	C	D	E	F	G	H	I
4		Enrollment	WSCH		WSCH/Enrollment		Enrollment	WSCH	
5		Actual	Actual	% Chg.	Actual	Forecast	Forecast	Forecast	% Chg.
6	1973	15,427							
7	1974	15,271	175,704		11.51				
8	1975	16,399	189,321	7.7%	11.54				
9	1976	17,062	185,983	-1.8%	10.90				
10	1977	18,495	191,306	2.9%	10.34				
11	1978	16,098	169,557	-11.4%	10.53				
12	1979	17,476	176,523	4.1%	10.10				
13	1980	18,276	178,384	1.1%	9.76				
14	1981	18,745	189,487	6.2%	10.11				
15	1982	17,753	173,403	-8.5%	9.77				
16	1983	15,296	166,870	-3.8%	10.91				
17	1984	14,169	156,905	-6.0%	11.07				
18	1985	14,633	160,625	2.4%	10.98				
19	1986	15,098	156,926	-2.3%	10.39				
20	1987	15,417	170,763	8.8%	11.08				
21	1988	16,423	183,029	7.2%	11.14				
22	1989	18,468	196,097	7.1%	10.62				
23	1990	20,431	194,405	-0.9%	9.52				
24	1991	19,574	184,954	-4.9%	9.45				
25	1992	18,016	185,489	0.3%	10.30				
26	1993	17,375	198,201	6.9%	11.41				
27	1994	17,430	189,871	-4.2%	10.89				
28	1995	17,515	192,822	1.6%	11.01				
29	1996	18,472	188,795	-2.1%	10.22				
30	1997	18,528	177,819	-5.8%	9.60				
31	1998	16,925	174,665	-1.8%	10.32				
32	1999	18,530	186,584	6.8%	10.07				
33	2000	18,639	188,610	1.1%	10.12				
34	2001	19,698	205,040	8.7%	10.41				
35	2002	19,793	204,648	-0.2%	10.34				
36	2003	18,835	209,986	2.6%	11.15				
37	2004	18,327	209,637	-0.2%	11.44				
38	2005	18,525	210,472	0.4%	11.36				
39	2006	18,802	217,809	3.5%	11.58				
40	2007	20,532	237,511	9.0%	11.57				
41	2008	21,169	242,707	2.2%	11.47				
42	2009	20,907	227,585	-6.2%	10.89				
43	2010	18,221	229,033	0.6%	12.57				
44	2011	18,968	226,748	-1.0%	11.95				
45	2012	16,548	206,497	-8.9%	12.48				
46	2013	17,087	213,879	3.6%	12.52				
47	2014	17,864	216,127	1.1%	12.10				
48	2015					12.17	18,146	220,761	2.1%
49	2016					12.23	18,432	225,481	2.1%
50	2017					12.30	18,723	230,301	2.1%
51	2018					12.37	19,018	235,210	2.1%
52	2019					12.44	19,318	240,221	2.1%
53	2020					12.50	19,623	245,335	2.1%
54	2021					12.57	19,932	250,540	2.1%
55	2022					12.57	20,246	254,487	1.6%
56	2023					12.57	20,565	258,496	1.6%
57	2024					12.57	20,889	262,569	1.6%

Space Inventory

CAPACITY / LOAD CATEGORIES



LECTURE



LAB



OFFICE



LIBRARY



**INSTRUCTIONAL
MEDIA**



OTHER

Room Use
Numbers

100s

200s

300s

400s

530s

520, 540 - 800s

Description

Classrooms
Support Spaces

Labs
Support Spaces

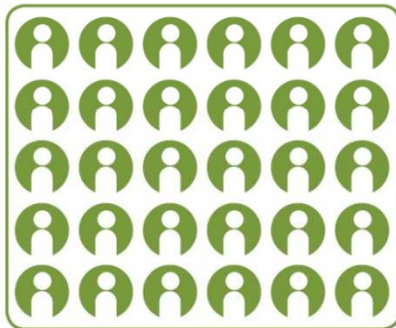
Offices
Support Spaces
All offices including
administrative and
student services

Library
Study
Tutorial
Support Spaces

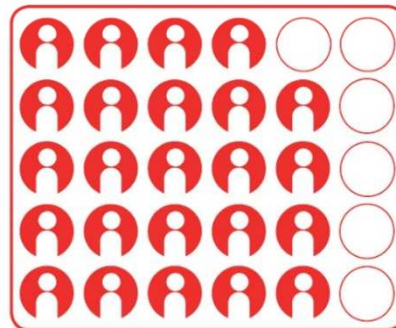
AV/TV
Technology
Support Spaces

PE
Assembly
Food Service
Lounge
Bookstore
Meeting Rooms
Data Processing
Physical Plant
Health Service

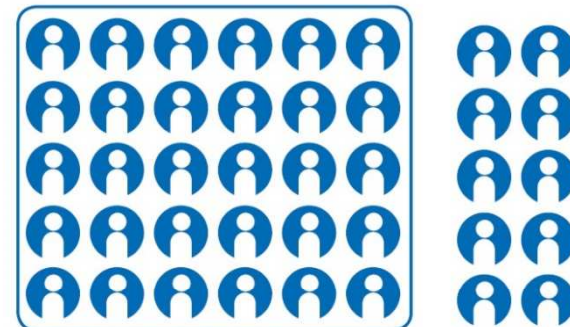
Capacity Load Ratios



of seats = # of students
100% capacity / load



of seats > # of students
over 100% capacity / load



of seats < # of students
under 100% capacity / load

*Eligible for
state funding*







Capacity Load Ratios - CALCULATING

Lecture	Ratio = WSCH Capacity / Actual (or projected) WSCH
Laboratory	Ratio = WSCH Capacity / Actual (or projected) WSCH
Offices	Ratio = FTEF Capacity / Actual (or projected) FTEF
Library	Ratio = ASF Capacity / Actual ASF (or projected)
AV / TV	Ratio = ASF Capacity / Actual ASF (or projected)







Calculating Space Needs

Lecture	$\text{ASF Needs} = (\text{WSCH} \times (47.3 \text{ or } 42.9)) / 100$ $\text{WSCH Capacity} = (\text{ASF} / (47.3 \text{ or } 42.9)) * 100$
Laboratory	$\text{ASF Needs} = (\text{WSCH} \times \text{Factor}) / 100$ $\text{WSCH Capacity} = (\text{ASF} / \text{Factor}) * 100$
Offices	$\text{ASF Needs} = \text{FTEF} \times (140 \text{ or } 160)$ $\text{FTEF Capacity} = \text{ASF} / (140 \text{ or } 160)$







Master Plan Space Program

		Current Inventory - 2015	Adjusted Inventory**
	LECTURE	42,364	
	LAB	145,850	
	OFFICE	56,883	
	LIBRARY	26,559	
	INSTR. MEDIA	10,600	
	OTHER	139,687	
	TOTAL ASF	421,943	

Master Plan Space Program

		Current Inventory - 2015	Adjusted Inventory**	Master Plan Space Program
	LECTURE	42,364		76,638
	LAB	145,850		121,853
	OFFICE	56,883		47,469
	LIBRARY	26,559		33,276
	INSTR. MEDIA	10,600		11,980
	OTHER	139,687		113,490
	TOTAL ASF	421,943		404,706

Master Plan Space Program

		Current Inventory - 2015	Adjusted Inventory**	Master Plan Space Program	Difference
	LECTURE	42,364		76,638	-34,274
	LAB	145,850		121,853	23,997
	OFFICE	56,883		47,469	9,414
	LIBRARY	26,559		33,276	-6,717
	INSTR. MEDIA	10,600		11,980	-1,380
	OTHER	139,687		113,490	
	TOTAL ASF	421,943		404,706	

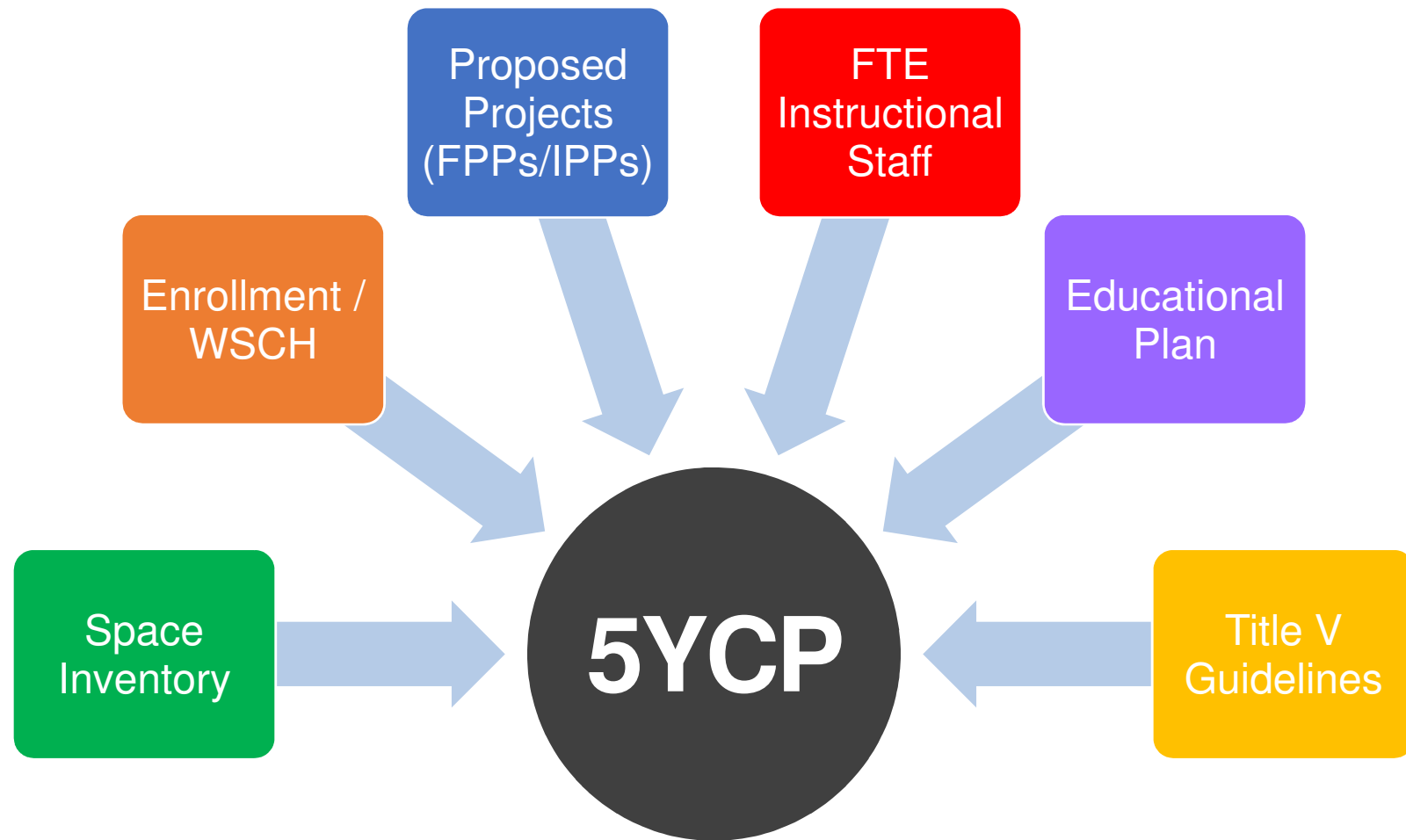
Integrated

State Capital Outlay Planning

5 Year Construction Plan (5YCP)

- The 5YCP is updated annually.
- The Plan provides detailed information regarding all capital construction projects with budgets exceeding **\$656,000** regardless of funding source, including:
 - Prioritized list of projects
 - Detailed scope description
 - Project category type
 - Funding sources
 - Funding years for project phases and occupancy year
 - Estimated project cost/budget
 - Project space array

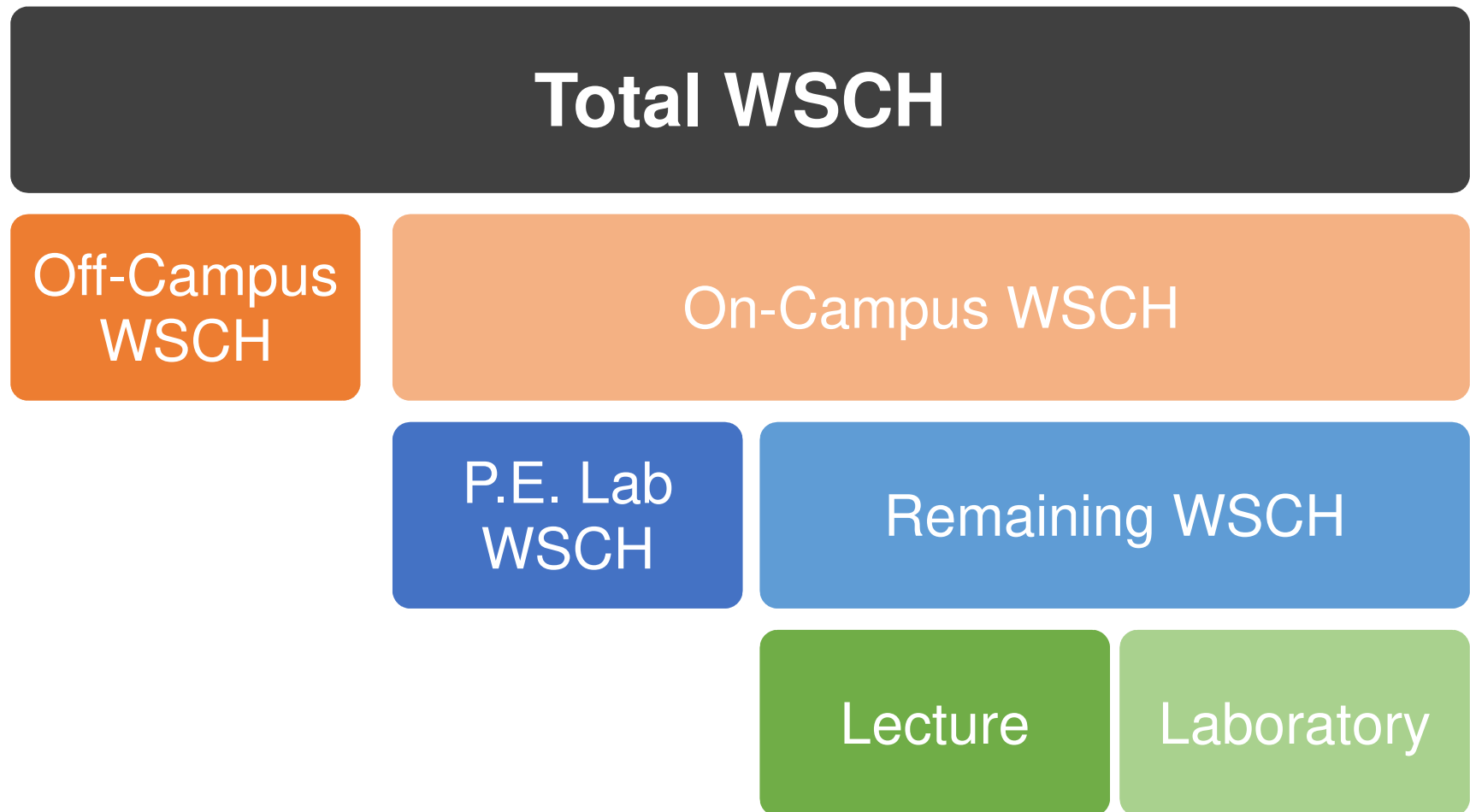
Components of the 5YCP



Opportunities & Challenges

- Incorporate new projects.
- Revise and update information from previous projects such as scope, schedule, and cost.
- Reevaluate prioritized list of projects from previous year.
- Reevaluate and plan to maximize available funding sources (state, local, other or blend).

Campus/Center WSCH Distribution



Project Categories

CATEGORY	DEFINITION	% OF FUNDS
A	Provides for safe facilities and to activate existing space	Up to 50%
B	Increases instructional capacity	Up to 50% of remaining
C	Modernizes instructional capacity	Up to 25% of remaining
D	Promotes completion of existing campuses	Up to 15% of remaining
E	Increases institutional support services capacity	Up to 5% of remaining
F	Modernizes institutional support services capacity	Up to 5% of remaining

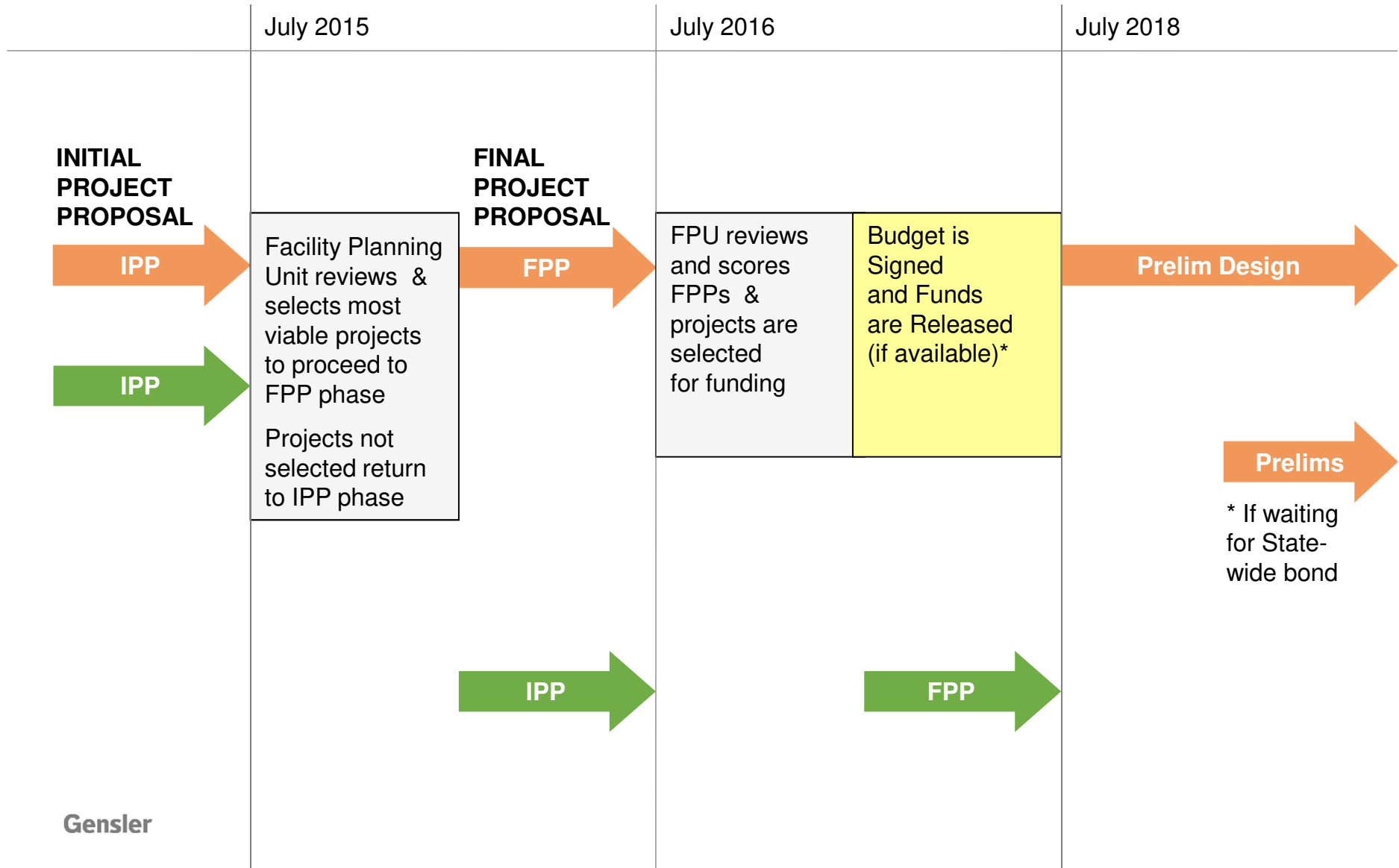
Project Criteria / Scoring

CATEGORY	Campus enrollment growth	Campus existing inventory	Solution ASF change	Age of bldg / FCI	Activation of Inactive Space	Project design	Age of site	Programs/services	Local contribution
A									
B	●	●	●						●
C				●	●				●
D						●	●	●	●
E	●	●	●						●
F				●	●				●

Project Competitiveness

- Project points (maximum 200)
- Competition
 - Highest points per category
- Capital outlay fund availability
 - Limited

Funding Cycles



Five-Year Construction Plan

Priority	Project Title	Campus	Cat.	Occupy Date	Status	I	31	32	33	Funded
<input type="checkbox"/> 1	SHOPS RENOVATION		C	2017/2018	Locally Funded or Future	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> 2	MAINTENANCE BUILDING		D2	2022/2023	Locally Funded or Future	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> 3	CAMPUS POLICE		E	2022/2023	Locally Funded or Future	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> 4	ALLIED HEALTH		B	2022/2023	IPP- Preparing	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> 5	CTE BUILDING		B	2022/2023	IPP- Preparing	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> 6	CAMPUS X - INSTRUCTIONAL BUILDING		B	2023/2024	IPP- Preparing	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> 7	CAMPUS CENTER RENOVATION		C	2024/2025	Locally Funded or Future	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> 8	CHILD DEVELOPMENT CENTER		D1	2023/2024	Locally Funded or Future	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> 9	KINESIOLOGY COMPLEX		D1	2024/2025	Locally Funded or Future	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> 10	INTERDISCIPLINARY COMPLEX		B	2025/2026	Locally Funded or Future	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Initial Project Proposal (IPP)

DESCRIPTION

- Project name
- Project Category
- Occupancy Date
- Brief description

SCORE

- Rubric based on project category
- Maximum score of 200

SPACE ANALYSIS

- Space added
- Space removed
- Capacity loads – start and end of project

California Community Colleges		Project Scenario Summary 2018		3/20/2016 4:21:57 PM	
		Instructional Building 1 (Official Version)		Page 1	
District:		Project Category	B	Occupancy Date	2021/2022
Campus:		Last Revised Date	3/20/2016		
Project Name:	Instructional Building 1	District Priority	3		
Project Description:					
This project proposes to construct an instructional building to accommodate the tremendous amount of academic growth. The campus currently has a lecture capacity/load ratio of 58% which means it is 42% short of lecture space. This building will address the needs for additional general classrooms and office space by constructing 6,800 asf in Lecture, 4,800 asf in Office, 6,500 asf in Study/Tutorial space, 3,000 asf in AV/TV and 1,200 asf on Other space.					

Category: B			ASF Change Score Calculations for Instructional Building 1				
Item	Score	Actual Data	Room Type	Net Change in ASF in Project	Initial Cap/Load Ratio	Initial Cap Load Year	Applied Net ASF*
Enrollment Growth	31	8,347	Lecture	6,800	59%	2018	6,800
Existing Inventory	28	58.69%	Lab	0	216%	2018	0
ASF Change	47	Click for popup	Office	4,800	84%	2018	4,800
Local Contribution	50	\$8,007,080/ \$16,014,165	Library	6,500	43%	2018	6,500
Total	156		AV/TV	3,000	8%	2018	3,000
			Other	1,200	N/A	2018	0
			Total	22,300			21,100
			Contribution Percentage				95%
			Eligibility Points				47

* Calculate as follows: If the capacity/load ratio is > 100% or Net ASF < 0, use 0 else use Net ASF

Space Analysis (ASF):							
Type	Lecture	Lab	Office	Library	AV/TV	Other	Total
Primary	6,800	0	4,800	6,500	3,000	1,200	22,300
Secondary	0	0	0	0	0	0	0
Net	6,800	0	4,800	6,500	3,000	1,200	22,300
Beg. Cap/Load Ratios (2018)	58.7%	215.8%	84.3%	43.2%	8.0%	N/A	74.8%
End. Cap/Load Ratios (2021)	99.0%	172.4%	98.8%	97.6%	98.4%	N/A	106.0%

Cost				
Project Phase	Funding Date	State Funds Requested	Non State Funds	Project Cost
Land Acquisition				
Preliminary Plans	2018/2019	\$278,000	\$278,000	\$556,000
Working Drawings	2018/2019	\$277,000	\$277,000	\$554,000
Construction	2019/2020	\$7,060,000	\$7,060,000	\$14,120,000
Equipment	2019/2020	\$393,000	\$393,000	\$786,000
Totals		\$8,008,000	\$8,008,000	\$16,016,000

Initial Project Proposal (IPP)

EXAMPLE

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Category: B					
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Existing Inventory	28	58.69%			
ASF Change	47	Click for popup			
Local Contribution	50	\$8,007,080/ \$16,014,165			
Total	156				

Space Analysis (ASF):

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Net	6,800	0	4,800	6,500	3,000	1,200	22,300
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Key Strategies

Key Strategies

Timelines

- Coordinate planning timelines
- Maximize opportunities for linking efforts

Data

- Collect data to serve multiple efforts
- Use data to inform planning discussions

IPPs and FPPs

- Strategize, prioritize and be selective
- Engage key stakeholders

Funding Plans

- Develop realistic project budgets
- Escalate based on realistic timelines
- Include a contingency

Communication

- Broaden communication to build wide-spread support