

## WHAT IS A FACILITY PLAN?

Facility planning is an emerging field with confusing terminology. How does a “master plan” differ from a “strategic master plan?” Is a campus plan part of a master plan or something else?

Every architect, consultant, and builder defines these terms differently. This article untangles the semantics so a leader knows what to ask for.

The two kinds of facility plans are the Master Plan and the Strategic Facility Plan, but both answer the primary planning question, “*What building or buildings do we need to support our strategic goals?*”

### Master Plan

A Master Plan (or “facility master plan” or “campus master plan”) is a long-term schedule of projects based only on assumptions provided by executives.

A Master Plan can have very different levels of detail and usually includes some or all of these space use analyses:

- Assessment of zoning, regulations, covenants
- Description of space standards / benchmarks
- Program of space use
- Workflow analyses
- Engineering assessment and plan
- Block, fit, or stacking plans
- Concept site plan or campus plan
- Architectural image concepts
- Long-term maintenance plan
- Construction estimates
- Phasing plan (the sequence of projects)

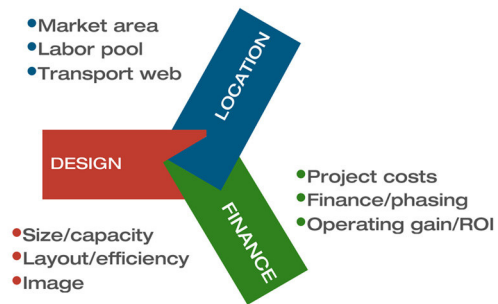
The Master Plan can be summarized as a colored site drawing or a timeline of projects. Sometimes the drawing itself is referred to as the Master Plan.

### Strategic Facility Plan

A Strategic Facility Plan builds on a Master Plan by adding “strategic” analyses of what is driving the projects. It does not depend only on the managers’ assumptions. These analyses might be of:

- Market, labor, and transport geographies
- Operations and logistics
- Brand assessment
- IT plan
- Organizational structure plan

A good Strategic Facility Plan integrates *all* the issues of design, location, and finance (see diagram).



### Extra credit: completing the business case

The most thorough Strategic Facility Plan adds two other ingredients to provide the complete business case: proof that the facilities support the organization’s core mission and strategy and proof that they yield the highest return at the lowest risk. The tools for these last two critical tasks are:

- Statement of facility objectives
- Sources and uses of funds
- Operating expenses analysis
- ROI analysis
- Cost/benefit Scorecard of alternatives

There will be other supporting schedules, but, it is the one-page Scorecard the Board will make their decision from. *Everything hinges on the fifteen minutes in which the leader presents the recommendation.*

### Specialty studies

Organizations often need to study specific facility issues like those listed below. Some of these can be studied independently, but most need the whole context provided by a Strategic Facility Plan.

- Feasibility analysis
- Lease vs. own analysis
- Consolidation study
- Decentralization study
- Merger/acquisition facility study
- Analysis of highest and best use
- Space optimization plan
- Project estimating and scheduling
- Stay/go analysis (also buy/build/renovate)

### Fifteen minutes with the Board

Planning is not just about the analyses; good planners know who to include, when to include them, what information is essential, how to brief the staff and—ultimately—win enthusiastic Board approval.