

What's the Mission? Where's the Money? Planning in Service of the Mission

2011 North Atlantic Regional Conference

MARCH 16–18, 2011 | THE UNIVERSITY OF MASSACHUSETTS AMHERST AND THE FIVE COLLEGES | AMHERST, MA (USA)

Welcome to the 26th Annual SCUP North Atlantic Regional Conference!

In the SCUP North Atlantic Region's 26-year tradition of exploring current themes and challenges in higher education planning, the Spring 2011 conference tackles the recent economic downturn that has forced a re-thinking in every aspect of higher education to prioritize, share, and optimize resources to do more with less OR less with less. If planning is about making informed choices to serve the institutional mission, then dealing with this "new economic reality" will have a transformative impact on higher education in North America, and its relationship with the rest of the world.

This year, we're at The University of Massachusetts Amherst and the Five Colleges area of western Massachusetts. The program includes dynamic plenary sessions, and an extraordinary variety of concurrent sessions to enrich you with ideas and information to support your planning initiatives, and to provide opportunities to share thoughts and strategies to support planning in the service of institutional missions. The optional Workshop on Wednesday afternoon will be held on the Amherst College campus. We have built in time to connect with colleagues, old and new, at receptions on Wednesday at 5:30 PM in the Campus Center Marriott Room and Thursday at 5:30 PM in the Integrated Sciences Building Atrium, both on the University of Massachusetts Amherst campus. Plan to talk with old friends and colleagues and meet new friends and colleagues at the receptions.

Optional tours are organized to UMass Amherst, Mount Holyoke College, and Smith College on Friday afternoon. If you haven't signed up for one of the tours on Friday afternoon, stop by the registration desk.

Welcome to this exciting conference! We hope that at the end of the conference, you will go back home replenished with new ideas on how to optimize resources to meet institutional goals. Enjoy all that UMass Amherst, the Five Colleges, and the Pioneer Valley have to offer!

Minakshi Mani Amundsen

Cornell University
Conference Co-Chair

Robert C. Hicks

Symmes Maini & McKee
Conference Co-Chair

Debi L. McDonald

Cannon Design
Conference Co-Chair

Thomas P. Huf

University of Massachusetts Amherst
Local Host Chair

Trina Mace Learned

Northfield Mount Hermon School
Regional Representative

WEDNESDAY, MARCH 16

NOTE: Paino Room and Room 100 are located in the Earth Sciences and Natural History Museum Building at Amherst College.

10:00 AM–2:00 PM | REGISTRATION IN PAINO
PRE-FUNCTION

NOON–1:30 PM | WORKSHOP LUNCH IN ROOM 100

INVITED PRECONFERENCE WORKSHOP

1:30 PM–4:30 PM | Paino Room (Room 107)

(N11W01) Facilities Stewardship: Prioritizing Needs in Support of Institutional Mission

Presented by: Trina Mace Learned, Director of Facilities, Northfield Mount Hermon School; Peter D. Zuraw, Assistant Vice President, Facilities Management & Planning, Wellesley College

Convened by: Robert C. Hicks, Senior Project Manager, Symmes Maini & McKee Associates

Without facilities stewardship, your institutional mission is vulnerable. It may be undermined by non-supporting, inadequate facilities or poor landscaping may portray a non-caring campus. Facilities' problems may expose financial difficulties central to the administration of your institution and facilities caused program interruptions could prompt every student to call home. No one has abundant funds to fix everything, all the time. How do you decide where and when to spend scarce resources to keep your campus safe, viable, and worthy of investment?

LEARNING OUTCOMES:

1. Acquire one method for collecting and categorizing facilities needs.
2. Translate institutional mission goals to a facilities renewal plan.
3. Develop strategies to appropriately "defer" work and clarify why.
4. Learn the language of the finance people to give credibility to your plan.

AIA 2.5 units, CM 3.0 units

3:00 PM–5:30 PM | REGISTRATION IN CAMPUS CENTER
MARRIOTT ROOM PRE-FUNCTION,
11TH FLOOR, UNIVERSITY OF
MASSACHUSETTS AMHERST

5:30 PM–7:30 PM | OPENING RECEPTION IN
CAMPUS CENTER MARRIOTT ROOM,
UNIVERSITY OF MASSACHUSETTS
AMHERST

THURSDAY, MARCH 17

NOTE: All events at University of Massachusetts Amherst

7:30 AM–9:00 AM | CONTINENTAL BREAKFAST IN
INTEGRATED SCIENCES BUILDING
ATRIUM

7:30 AM–5:00 PM | REGISTRATION IN
INTEGRATED SCIENCES BUILDING
ATRIUM

OPENING PLENARY SESSION

9:00 AM–10:00 AM | Integrated Sciences Building 135

(N11P03) The Challenges Beyond 2011; A Higher Ed Journalist's View

Presented by: Doug Lederman, Inside Higher Ed

Convened by: Minakshi Mani Amundsen, University Planner, Cornell University

America's constellation of colleges and universities is under unprecedented pressure to turn out more educated young people and adults—at a time when the money available to them, from public and other sources, is flattening if not falling outright. That collision of factors is forcing campus leaders, faculty and staff to consider short- and long-term changes in how their institutions operate—not only at an administrative and operational level, but in core areas such as instruction. Doug Lederman, who, as a journalist, has been covering higher education for 25 years, will address some of the following questions: Are higher education's business models broken? Must colleges and universities narrow their missions? Is productivity a four-letter word?

CONCURRENT SESSIONS

10:15 AM–11:15 AM | Skinner Hall 106

(N11C11) Integrating Academic, Financial, Capital and Physical Planning for the Four Connecticut State Universities

Presented by: Keith Epstein, Assistant Vice Chancellor for Planning and Technical Services, Connecticut State University System; Mark J. Zarrillo, Principal, Symmes Maini & McKee Associates

Convened by: Jean A. Stark, Principal, JMZ Architects and Planners, PC

The presentation will focus on how the strategic plan for each of the four state universities integrated their academic, financial, and capital improvements into a physical plan update. The presentation will include development strategies that accomplish the mostx for each campus within legislative fiscal constraints and cuts in available funding due the state of the current economy. The completion of the master plan updates for the four institutions provided a mechanism that allows the universities' plans to work cohesively within a system to maintain, adapt, plan, and continue to build important campus programs and buildings.

LEARNING OUTCOMES:

1. Determine how the academic foci of multiple universities integrate into the university system.
2. Identify strategies for creating a multiple-campus physical plan update that benefits all campuses' growth.
3. Select options for current and future funding opportunities.
4. Align program capacity, special purposes, and infrastructure projects needs.

AIA 1.0 unit, CM 1.0 unit

10:15 AM–11:15 AM | Integrated Sciences Building 329

(N11C12) Vital University Technology: Update Data Centers Economically for Skyrocketing Needs

Presented by: Paul Dietel, Assistant Director/Design & Construction, Brown University; Jason Iacovelli, Construction Project Manager, Gilbane Construction; Paul Kelleher, Director, Data Center, Brown University; Robert J. Stein, Principal, Integrated Design Group, Inc.
Convened by: Richard E. Rice, Engineer, M/E Engineering

Brown University faced a situation similar to many other institutions of higher education—its primary data center, built in the 1980s, was challenged by the rapid growth of high-end digital users, primarily within research and instruction. Replacing a facility with a new one is costly, and in the present climate the funds are often not available. How could evolving needs be met within budget and operational constraints? The presenters will describe how they creatively achieved their ambitious goal.

LEARNING OUTCOMES:

1. Determine ways to define and evaluate growth to accommodate rapidly expanding information technology needs.
2. Devise a plan that provides modular and scalable information technology expansion, currently and for the future.
3. Identify a strategy for controlling implementation cost over time.
4. Review the steps for completing a highly complex construction process, in an operating facility, economically and without operational interruptions.

AIA 1.0 unit, CM 1.0 unit

10:15 AM–11:15 AM | Skinner Hall 112

(N11C22) Taking Stock: Repurposing Buildings as Part of an Institution's Strategic Vision

Presented by: Mark Gonthier, Associate Dean, Tufts University; Mary S. Nardone, Associate Vice President, Capital Planning & Construction, Boston College; Robert H. Quigley, Principal, ARC/Architectural Resources Cambridge; David W. Varone, University Architect, Johnson & Wales University

Convened by: David Zenk, Senior Associate, Gund Partnership

Implementing a master plan in the wake of a new strategic vision is an important decision for any institution. When it's made within the context of a challenging economy, the decision is that much bolder. Using three examples—Boston College, Tufts Dental School and Johnson & Wales University—the presenters will describe how each owner reviewed their existing building stock, evaluated the intrinsic value of these assets, and embarked on a major repurposing project that solved immediate space planning needs, while also laying the foundation for the implementation of future projects.

LEARNING OUTCOMES:

1. Assess the potential of what you already have in your existing building stock.
2. Explain the financial, functional, sustainability, and emotional factors associated with repurposing an existing building.
3. Discuss how repurposing buildings can help achieve an institution's planning objectives.
4. Recognize opportunities for re-envisioning and/or strengthening an institution through a major repurposing project.

AIA 1.0 unit, CM 1.0 unit

10:15 AM–11:15 AM | Skinner Hall 201

(N11C27) Found In Space: Observational Evidence for Informal Gathering Spots

Presented by: Donald H. Clemmenson, Student Body President, Architecture Student, Keene State College; Jay V. Kahn, Vice President of Finance and Planning, Keene State College; Gordon B. King, Senior Director, Facilities Planning & Management, Suffolk University; Aislynn E. Sherry, Architecture Student, Keene State College; Heather Taylor, Principal & Project Executive, EYP Architecture & Engineering
Convened by: Scott Payette, Principal, Fletcher-Thompson

For several years campus design has emphasized informal, serendipitous spaces where students and faculty gather for casual, interactive, learning and socializing. But how do we measure these spaces' effectiveness? Speakers representing a New England liberal arts college and an urban university will share observational and empirical evidence and a planning/architecture student will divulge outcomes of a directly relevant proprietary research project. An interactive portion will allow critique and discussion of what makes or breaks the value of informal campus spaces.

LEARNING OUTCOMES:

1. Compare a diversity of institutional types, building types and individual perspectives on what works and what does not in learning space design.
2. Examine data from institutional research on the impact informal space has on culture, student success and enrollment goals for specific programs.
3. Dissect outcomes of Keene architecture school project that tests the most and least effective study and gathering spaces—from student and faculty perspectives.
4. Participate in interactive round tables to glean ideas that can be applied back on home campuses.

AIA 1.0 unit, CM 1.0 unit

10:15 AM–11:15 AM | Integrated Sciences Building 221

(N11C32) Breaking Boundaries, Making Connections: Optimizing Resource Planning Beyond the Campus

Presented by: Benjamin M. Carlson, Associate, Goody, Clancy & Associates; David Dixon, Principal, Planning & Urban Design, Goody, Clancy & Associates; Robert Francis, Vice President, University Facilities, Drexel University

Convened by: David H. Barkin, Principal, JCI Architecture

An urban campus' neighborhood context increasingly plays many important mission-serving roles—attracting key faculty, connecting to broader learning and entrepreneurship opportunities, and hosting service, research, and educational outreach. This session examines four universities' approaches—Drexel, University of Washington, and Ohio

State—to planning cooperatively beyond the campus edge to seize unprecedented opportunities to access transit, amenities, key workforce and students. This session explores how universities can work with communities toward effective, efficient, sustainable ways to invest in shared goals.

LEARNING OUTCOMES:

1. Cooperate effectively with neighbors and municipalities in planning for areas of campus/community overlap.
2. Prioritize university investments (for land, buildings, outreach, etc.) in neighborhood contexts according to their shared value to campus and community.
3. Recognize the growing benefits urban neighborhoods can offer a campus—such as amenities and attracting and retaining top faculty, staff, and students.
4. Discover the economic, environmental, and social benefits possible through the emerging concept of eco-districts.

AIA 1.0 unit, CM 1.0 unit

PLENARY SESSION

11:30 AM–12:30 PM | Integrated Sciences Building 135

(N11P01) The UMass Amherst Strategic Plan: A Roadmap for Education, Research, and Growth

Presented by: Robert C. Holub, Chancellor, University of Massachusetts Amherst

Convened by: Thomas P. Huf, Senior Education Facilities Planner, University of Massachusetts

Developing a strategic plan is one of the most important tasks for any campus. Perhaps most important in undertaking planning is striking the appropriate balance between too much detail and micromanaging, on the one hand, or vagueness of goals and empty platitudes, on the other. I chose to proceed in a manner I had not seen in my two previous experiences with strategic planning. With the help of the senior staff, I composed a high-level “framework” document with appropriate goals and benchmarks, had it vetted by various groups (deans, faculty senate, trustees), and then asked units on campus to do their own strategic plans to meet general campus goals. The jury is still out on effectiveness, but I believe it has engaged the campus in the planning process and caused many people in various areas to become aware of what the campus needs to do in order to make progress.

12:30 PM—1:45 PM | LUNCH IN

CAMPUS CENTER AUDITORIUM

CONCURRENT SESSIONS

2:00 PM–3:00 PM | Integrated Sciences Building 221

(N11C07) How the UMass Strategic Plan Changed Science Planning: Transdisciplinary Science Clusters

Presented by: James E. Cahill, Director, Facilities & Campus Planning, University of Massachusetts; Steven D. Goodwin, Dean, College of Natural Sciences, University of Massachusetts; William F. Wilson, Principal, Wilson Architects, Inc.

Convened by: Thomas P. Huf, Senior Education Facilities Planner, University of Massachusetts

“The University of Massachusetts-Amherst must be more than a regional power; it should aspire to be among the top public

research universities in the country.” This mission statement was the core of the chancellor’s strategic plan in early 2008. Less than three years later, UMass Amherst has made great strides toward addressing this challenge—in part, through redirecting the science facilities master planning process. A deliberate departure was made from traditional planning and assessment standards, resulting in a reorganization of the sciences to a trans-disciplinary focus on research excellence.

LEARNING OUTCOMES:

1. Discover how a facilities planning and building design process can be retooled while in progress to respond to changes in the institution’s mission and the limits in funding.
2. Describe one approach to linking facilities assessment, user needs in sciences, and reduction in deferred maintenance costs, through implementation of new sustainable facilities.
3. Assess the applicability of alternative processes to capital projects and renovations, such as the UMass Cluster RFP Process for selecting occupants of new buildings.
4. Determine whether approaches like the UMass integrated science plan and RFP process can be adapted to work on your campus to link facilities needs and academic mission.

AIA 1.0 unit, CM 1.0 unit

2:00 PM–3:00 PM | Skinner Hall 012

(N11C15) Planning and Building Through the Great Recession: The Boston Conservatory

Presented by: Curtis Kemeny, President, Boston Residential Group, Head, Building Committee, Board of Directors, The Boston Conservatory; D. B. Middleton, Partner, Handel Architects; Richard Ortner, President, The Boston Conservatory

Convened by: Gary L. Brewer, Partner, Robert A.M. Stern Architects

The Boston Conservatory’s mission is “educating exceptional performing artists.” When they embarked on planning, design, and construction on the Hemenway Project (a 40,000 s.f. multi-disciplinary performance and classroom building) they faced the same issues as many urban institutions: limited space, proximate neighbors, and pricey real estate. While working within the drama of an acute recession, it stayed true to its mission by devising creative financing strategies and choosing a flexible design strategy. This allowed the project to open on time and on budget.

LEARNING OUTCOMES:

1. Determine ways for a small endowment, tuition-based school to leverage its assets to achieve its vision.
2. Identify methods for defining programmatic needs early and measure them against the long-term institutional goals.
3. Identify financing strategies and their influence on design decisions.
4. List ways in which a project team can remain nimble in the face of a rapidly changing building and financing environment.

AIA 1.0 unit, CM 1.0 unit

2:00 PM–3:00 PM | Skinner Hall 112

(N11C25) Transforming Modernist Liabilities Into Sustainable Assets

Presented by: Salvatore G. Filardi, Associate Vice Chancellor, Administrative Services, University of Massachusetts - Dartmouth; Catherine Fortier-Barnes, Assistant Dean of Library Services, University of Massachusetts - Dartmouth; Neil J. McElroy, Dean of Libraries & Information Technology Services & Special Assistant to the President for Information Technology Strategies, Lafayette College; Robert J. Miklos, President, designLAB architects

Convened by: Steven Hugo, Principal, HOLT Architects, P.C.

The renovations at the University of Massachusetts - Dartmouth and Lafayette College illustrate two strategies for how outmoded modernist libraries can be re-conceived to meet the changing programmatic, institutional, and sustainability needs of contemporary academic libraries. The projects have contrasting approaches, but common planning goals. First, the institutions sought to minimize project costs by re-use of as much existing infrastructure as possible (despite its many shortcomings). Second, the institutions sought to fundamentally change the library from a repository for books, to a center for social engagement.

LEARNING OUTCOMES:

1. Utilize re-programming to increase the value of renovation projects.
2. Improve energy efficiency in underperforming buildings.
3. Optimize the inherent value of existing space.
4. Provide identity branding through place-making.

AIA/HSW/SD 1.0 unit, CM 1.0 unit

2:00 PM–3:00 PM | Integrated Sciences Building 329

(N11C30) Outparcel Integration: The Depot Campus—Academic, Financial, Capital and Physical Planning Strategies to Maintain, Adapt, Plan and Build for the Highest and Best Future Use

Presented by: Frances M. Gast, Planner, University of Connecticut; Mark J. Zarrillo, Principal, Symmes Maini & McKee Associates
Convened by: Ned A. Collier, Principal, Cannon Design

The Depot Campus at the University of Connecticut (UConn) is unique. As an out parcel from the main campus, it has characteristics and issues very different from those of the primary college campus. The opportunity to develop the master plan for UCONN's Depot Campus provided an opportunity to work with the faculty and administrative staff, all of whom recognize the campus' potential and desire to see it transformed for its highest and best use. The buy-in of these groups put the program development and planning into unique perspective for assessing academic, financial, and physical planning connections to the main campus. The master plan for the Depot Campus is a guide for phased growth that establishes needs, priorities, and schedules, and proposes cost effective solutions.

LEARNING OUTCOMES:

1. Evaluate strategies for planning affordable renovations that make the most of existing resources.
2. Interpret program, capacity, special purpose, and infrastructure projects needs.
3. Formulate current and future expansion opportunities.
4. Organize the physical plan update that benefits integration.

AIA 1.0 unit, CM 1.0 unit

2:00 PM–3:00 PM | Skinner Hall 106

(N11C31) Doing More With Less—Marrying the Budget and the Plan

Presented by: Emily Dibble, Executive Dean, Institutional Effectiveness, Bunker Hill Community College; Jay W. Vogt, President, Peoplesworth
Convened by: Debbie Crooke, Director, Client Services, Thompson Consultants, Inc.

Participants will learn about the planning and budgeting process that has driven the transformation of Bunker Hill Community College over the last decade. The college's organizational development consultant will share the planning process steps that have proven to be inclusive and results-oriented. The college's institutional effectiveness officer will share the budgeting process steps that have engaged community members in planning, funding, and implementing action plans to achieve college goals. Each will help you apply these steps to your home institution.

LEARNING OUTCOMES:

1. Assess the steps in a planning process designed for engaging the diverse stakeholders of a college community in setting long range goals, rapidly, and collaboratively.
2. Apply these planning process steps to your institution.
3. Identify budgeting process steps for empowering college community members in planning, funding, and implementing action steps that achieve college goals.
4. Practice applying these budgeting process steps to your institution.

AIA 1.0 unit

TOOLKIT SESSIONS

3:15 PM–3:45 PM | Skinner Hall 112

Building Code Requirements for Existing Buildings

Presented by: Kevin Sullivan, Principal, R.W. Sullivan
Convened by: Lisa Reindorf, Principal, Goldman Reindorf Architects

We will review the major requirements of the International Existing Building Code, which has been adopted by many states as the primary code for existing building renovations. This code includes a number of different compliance options that will be explored. Additional code requirements related to energy conservation and accessibility in existing buildings will also be covered.

LEARNING OUTCOMES:

1. Identify the correct, applicable codes for a renovation project.
2. Develop understanding of the major code thresholds for existing building renovations.
3. Incorporate code requirements into planning for future renovation projects.
4. Improve ability to communication with local authorities having jurisdiction on existing building code issues.

Integrative Master Plan Programming

Presented by: Ludmilla Pavlova-Gillham, Senior Facilities Planner, University of Massachusetts - Amherst; Pamela Rooney, Assistant Director, Space & Asset Management, University of Massachusetts; Alexander Stepanov, GIS Analyst, University of Massachusetts

Convened by: Paula Schumann, Principal, R. E. Dinneen Architects & Planners, Inc.

Space allocation planning is a complex problem that requires the integration of multiple parameters—functional programs and their relationships, space utilization and needs assessment, and building condition analysis and capital planning. This session will report on the University of Massachusetts master plan program methodology and how our team is leveraging enterprise information systems (space, building and human resource data) and technologies (AutoCAD, MS Excel, MS Access, and GIS) to develop formulaic theoretical sizing for departmental space utilization and needs assessment.

LEARNING OUTCOMES:

1. Evaluate strategies for integrating data from multiple sources and managing large data sets for campus-wide space needs assessment and planning.
2. Determine how to develop credible data, apply space standards, and create dynamic documentation that will serve your institution today and in the future.
3. Discover how the use of Geographic Information Systems (GIS) can be applied to the study and optimization of space allocation.
4. Weigh alternative methods for visualizing facilities inventory, condition, and occupancy information that make the most of your information technology investments.

Planning to Present your Plan? Tips for Effective Presentations

Presented by: Trina M. Learned, Director of Facilities, Northfield Mount Hermon School

Convened by: Kim Kingston, Director, Business Development, HSH/Howard Stein-Hudson Associates

As a planner, presenting your process, progress, and findings is often the critical link between your work and its successful implementation. Many planners are good listeners, practiced data collectors, capable information synthesizers, and clear writers; few are good presenters. This quick session will provide you with insiders' tips and techniques for effective presentations. I will guide you on structuring your materials—what you need to say, when you should say it, and what not to say, presenting yourself, and presenting your facts and figures to support, not confuse, your message. I will also discuss various methods of illustrating your presentation—including handouts, flip charts, and Powerpoint—and the applicability and effectiveness of each.

LEARNING OUTCOMES:

1. Recognize strategies for effective presentations.
2. Acquire a tool-kit for organizing your ideas and presenting them to decision-makers.
3. Evaluate and support colleagues' presentations and make improvements for better effect.
4. Overcome fears and shortcomings in your own public-speaking.

CONCURRENT SESSIONS

(N11C10) Williams College Comprehensive Energy Management Strategy

Presented by: Mary E. House, Vice President, Energy Efficiency and Sustainability, Woodard & Curran; Diana E. Prideaux-Brune, Associate Vice President, Facilities, Williams College

Convened by: John R. Benson, Senior Program Manager, Massachusetts Division of Capital Asset Management

Instituting a comprehensive energy management strategy was an opportunity for Williams College to reduce greenhouse gas emissions, save energy and money, and drive behavioral changes. Williams' program integrates energy procurement, energy conservation, load management, renewable and alternative energy, and enhanced on-campus awareness by examining all aspects of energy consumption holistically. A proactive approach to energy procurement was developed and achieved real cost savings. Technical and behavioral conservation measures identified resulted in an energy reduction goal to complement the existing greenhouse gas reduction goal.

LEARNING OUTCOMES:

1. Review a strategic, comprehensive, energy management strategy to reduce greenhouse gas emissions, save energy and money, and drive behavioral change.
2. Integrate sustainability objectives within a larger energy management framework.
3. Analyze a range of energy procurement options within a school's tolerance for risk.
4. Identify technical and behavioral energy conservation measures.

AIA/HSW/SD 1.0 unit, CM 1.0 unit

(N11C23) Mock-Up, Mock-Down Planning

Presented by: Carl Jay, Project Manager, Shawmut Design and Construction; Kevin Sullivan, Vice President, Shawmut Design and Construction; Gary Tondorf-Dick, Projects Program Manager, MIT; William Vitkosky, Senior Project Manager, MIT

Convened by: John Shreve Arbuttle, Business Development Manager, Hoffmann Architects, Inc.

What factors need to be considered when a university determines how to manage the aging windows in their 100-year old core buildings, while balancing its need for sustainability with its available resources? The Massachusetts Institute of Technology has been involved in multiple planning studies over the past decade to solve this problem. When they developed a transformational pilot program to examine the windows in *situ*, with a full mock down/mock up process, they finally could objectively evaluate the real cost/benefit of various strategies for restoration, replacement, or renovation.

LEARNING OUTCOMES:

1. Identify the steps in a transformational planning process for critical decision-making on whether to restore, replace, or renovate aging windows.
2. Describe ways for doing more with less to maintain the existing physical plant.
3. Determine steps for studying complex, historic, buildings to maximize their sustainability.
4. Combine planning with action-focused and discovery-rich mock ups and mock downs.

AIA/HSW/SD 1.0 unit, CM 1.0 unit

4:00 PM–5:00 PM | Integrated Sciences Building 321

(N11C28) Putting the Partner in Public/Private Partnerships: A Healthcare Training Collaboration

Presented by: Todd Drake, Associate Principal, Ballinger; Thomas S. Riles, Frank C. Spencer Professor of Surgery and Associate Dean for Medical Education and Technology, New York University-Medical Center; Dana Sunshine, Senior Project Manager, Public/Private Partnerships, City University of New York

Convened by: Kathy McMahon, Director, Marketing & Business Development, CBT Architects

Post-9/11, City University of New York (CUNY) envisioned creating a major, state-of-the-art training center for simulated emergency response and related health care training. With the recession's onset, CUNY focused on leveraging capital commitments to secure operational funding requirements for the technology-driven center. The session will elaborate on the benefits and challenges generated by the resulting public/private partnership between CUNY and New York University Medical Center, and the collaborative development of a center which will support the 21st century curricular agendas of both institutions.

LEARNING OUTCOMES:

1. Leverage existing funding to address long-term economic uncertainties, while meeting program goals.
2. Identify key requirements for successful public/private partnerships.
3. Develop collaborative processes across institutions and across disciplines to create new learning environments.
4. Identify benefits of investing in strategically planned, flexible, efficient, simulation training space that accommodates progressive technologies.

AIA 1.0 unit, CM 1.0 unit

4:00 PM–5:00 PM | Skinner Hall 112

(N11C35) Integrated Climate Action Planning on a Budget

Presented by: Steve Burdic, Sustainability Coordinator, University of Missouri; Linda Eastley, Principal, Sasaki Associates, Inc.; Meredith Elbaum, Director of Sustainable Design, Sasaki Associates, Inc.

Convened by: Jennifer L. Kelley, Marketing Manager - Institutions, VHB/Vanasse Hangen Brustlin, Inc.

Of the close to 700 signatories of the American College and University Presidents Climate Commitment (ACUPCC), fewer than half have completed their Climate Action Plans. Those that have submitted plans differ significantly in terms of scope, process, and costs to complete them. This session will outline the various approaches to developing these plans and then present in detail an innovative, cost effective approach

to climate action planning implemented by the University of Missouri with Sasaki, by integrating the plan with the campus master plan.

LEARNING OUTCOMES:

1. Recognize varied approaches to climate action planning.
2. Create a realistic schedule and assemble the right team for developing a climate action plan.
3. Evaluate a master plan for integrated sustainability.
4. Identify key components of an integrated climate action plan.

AIA/HSW/SD 1.0 unit, CM 1.0 unit

4:00 PM–5:00 PM | Integrated Sciences Building 329

(N11C37) Project Delivery Methods: Choices and Construction Management in Lean Times.

Presented by: Scott Odell, The Whiting-Turner Contracting Company; Jeffrey G. Quackenbush, Lead Capital Project Manager, University of Massachusetts Amherst; Katie Wisienwski, The Whiting-Turner Contracting Company

Convened by: Lisa Hellmuth, Director of Marketing, Wilson Architects, Inc.

The bidding and construction phase of capital projects is a complex array of management challenges that require particular attention to integrated planning of schedules, construction budgets and administrative adherence to all regulatory and legal requirements. While the legal framework for bidding and construction varies from state to state, the basic options available to Universities and Colleges through the construction management process are similar across the North Atlantic region. We will review four types of construction management methods for project delivery and present the UMass New Laboratory Science building as a case study in the Construction Management at Risk method of project delivery.

LEARNING OUTCOMES:

1. Discuss the pros and cons to the owner and design team of each delivery method.
2. Select a project we are currently working as CM and describe what the work involved with the pre-construction and construction phases.
3. Discuss BIM/VDC and their uses in a project during pre-construction and construction.

5:30 PM–7:30 PM | RECEPTION IN

**INTEGRATED SCIENCES BUILDING
ATRIUM**

FRIDAY, MARCH 18

NOTE: All events at University of Massachusetts Amherst

**7:30 AM–2:00 PM | REGISTRATION IN
INTEGRATED SCIENCES BUILDING
ATRIUM**

**8:00 AM–9:00 AM | BREAKFAST BUFFET IN
INTEGRATED SCIENCES BUILDING
ATRIUM**

CONCURRENT SESSIONS

9:00 AM–10:00 AM | Integrated Sciences Building 329

(N11C16) UMass Amherst Green Building Guidelines

Presented by: Ludmilla Pavlova-Gillham, Senior Facilities Planner, University of Massachusetts - Amherst; Jeff Quackenbush, Capital Project Manager, University of Massachusetts; Josh Stoffel, Sustainability Coordinator, University of Massachusetts Amherst
Convened by: Lonny Rossman, Principal, API Partners, LLC

Meeting the American College and University President's Climate Commitment requires a multi-disciplinary approach to a multifaceted problem. This presentation will focus on how the University of Massachusetts-Amherst Sustainability Council's Green Building Committee developed a set of design guidelines that document green building priorities in light of the environmental realities and mission of the University. The process depended upon the leadership of facilities professionals and the participation of many academic, administrative, and student stakeholders. The process delivered a comprehensive and dynamic product that will serve as a resource on green building design for the entire campus community.

LEARNING OUTCOMES:

1. Recognize the critical role played by organizational leaders in advancing sustainability.
2. Explain how green building standards contribute to carbon reduction targets.
3. Identify integrative building design strategies and how they apply to the triple bottom line.
4. Demonstrate how to apply the LEED Rating System to meet institutional goals.

AIA/HSW/SD 1.0 unit, CM 1.0 unit

9:00 AM–10:00 AM | Integrated Sciences Building 321

(N11C38) Facilities Stewardship: Prioritizing Needs in Support of Institutional Mission

Presented by: Trina Mace Learned, Director of Facilities, Northfield Mount Hermon School; Robert C. Hicks, Senior Project Manager, Symmes Maini & McKee Associates

Without facilities stewardship, your institutional mission is vulnerable. It may be undermined by non-supporting, inadequate facilities or poor landscaping may portray a non-caring campus. Facilities' problems may expose financial difficulties central to the administration of your institution and facilities caused program interruptions could prompt every student to call home. No one has abundant funds to fix everything, all the time. How do you decide where and when

to spend scarce resources to keep your campus safe, viable, and worthy of investment?

LEARNING OUTCOMES:

1. Acquire one method for collecting and categorizing facilities needs.
2. Translate institutional mission goals to a facilities renewal plan.
3. Develop strategies to appropriately "defer" work and clarify why.
4. Learn the language of the finance people to give credibility to your plan.

9:00 AM–11:15 AM | Skinner Hall 201

(N11C14) Lean Thinking: A Proven Approach to Tackle Institutional Planning Challenges

NOTE: This is a two-hour concurrent session from 9:00 AM to 11:15 AM.

Presented by: Karl Kowitz, Smith College; Kelly C. Meade, Manager of Client Value, Haley & Aldrich, Inc.; Joel Mooney, Senior Vice President, General Manager – Real Estate, Haley & Aldrich

Convened by: Liz Fennessy, Business Development Leader, Haley & Aldrich

"Lean" is a proven approach commonly used in manufacturing to increase customer value and reduce waste. Innovative institutions, planners, and design professionals who seek new approaches to effective collaboration and consensus building are now applying this results-oriented approach. In this session, the audience will participate in portions of a simulated "Kaizen" (rapid improvement event) to learn and practice applying lean principles and tools to find better ways to tackle a common planning challenge faced by Smith College.

LEARNING OUTCOMES:

1. Recognize the benefits of using lean principles from manufacturing on campuses. In particular, the concept of identifying "value vs. waste" in campus planning can be universally applied to strategy, planning, and implementation challenges at any level of a system.
2. Discover and begin using a new approach for effectively engaging stakeholders in seeing the "big picture" as a way to build consensus and support for planning programs.
3. List the ways in which Value Stream Mapping (a lean tool) can be used to help all stakeholders with systems thinking and the identification of underlying issues.
4. Solve a challenge in real-time through collaboration with other participants.

AIA 2.0 units, CM 2.0 units

Join SCUP's North Atlantic LinkedIn Group!

[HTTP://HT.LY/46DJR](http://ht.ly/46DJR)

10:15 AM–11:15 AM | Skinner Hall 106

(N11C29) Integrated Planning Strategies to Manage Campus Facilities in Difficult Economic Times

Presented by: Joyce M. Hatch, Vice Chancellor, Administration & Finance, University of Massachusetts; James Kadamus, Vice President, Sightlines

Convened by: Renee Driscoll, Senior Business Development Associate, Rolf Jensen & Associates, Inc.

In an ever changing and volatile financial environment, having valid and reliable information and knowledge on how to invest capital and manage facility operations is critical if campuses want to make their case for resources. Learn how the University of Massachusetts - Amherst, a large public university, is using an integrated facilities planning strategy to make their case within the institution and to the state government, and to measure the impact of capital investments over time.

LEARNING OUTCOMES:

1. Identify the steps in creating a diverse set of stakeholders for an integrated facilities planning process.
2. Use a common vocabulary, performance measurement, and benchmarking tools to plan capital and facility operations in a holistic way.
3. Apply the strategies and performance metrics used at the University of Massachusetts - Amherst to a campus.
4. Create a planning framework to deal with difficult economic circumstances.

AIA 1.0 unit, CM 1.0 unit

10:15 AM–11:15 AM | Integrated Sciences Building 221

(N11C34) Aligning Mission, Resources, and Vision: A Community Conversation with Town, Gown, and Non-Profits

Presented by: E. Thomas Dowling, President, Greater Keene Chamber of Commerce; James B. Draper, Special Projects Liason Director of Purchasing and Contract Services, Keene State College; Kenneth A. Schwartz, Principal, Corporate Planning Practice Leader, Vanasse Hangen Brustlin, Inc.

Convened by: Graham S. Wyatt, Partner, Robert A.M. Stern Architects, LLP

Building on earlier city-wide goal setting and visioning, a partnership came together in 2010 to participate in a community process that sought to define an integrated approach to the future revitalization of Gilbo Avenue, a significant street in the center of Keene, New Hampshire. The partnership consisted of a cross-section of the community and included, the City of Keene, Keene State College, Antioch University-New England, Keene Chamber of Commerce Foundation and Arts Alive!. Representatives of the partnership will present the process through which the broader community was engaged, while highlighting the respective mission(s) and shared objectives of the partnership.

LEARNING OUTCOMES:

1. Examine the goals and objectives of various stakeholders engaged in a community-based planning process and learn to identify where both different and shared interests lie.
2. Recognize how the varied mission and program/project objectives of key stakeholders—the city, institutions, and non-profits—may be translated into programmatic activities that reflect a broad-based consensus.
3. Illustrate the interactive planning process by which the community has been engaged through effective outreach, communications, and participatory activities.
4. Assess how discrete projects within the project area may be influenced relative to use, program, function, and funding as a result of specific outcomes of the planning process.

AIA 1.0 unit, CM 1.0 unit

CLOSING PLENARY SESSION AND LUNCH

11:30 AM–1:00 PM | Campus Center Marriott Room

(N11P02) What's the Mission? Where's the Money? Four CFOs Offer Insights and Strategies, both Distinct and Collaborative

Presented by: Ruth Constantine, Vice President/Finance & Administration, Smith College; Joyce M. Hatch, Vice Chancellor, Administration & Finance, University of Massachusetts; Mary Jo Maydew, Vice President, Finance & Administration, Mount Holyoke College; Peter Shea, Treasurer, Amherst College

Panel Moderator: Alisa J. Kahn, Associate, Director of Marketing, ARC/ Architectural Resources Cambridge

In 1965, four private, liberal arts colleges and the Amherst campus of the state university established one of the nation's oldest academic consortia, Five Colleges, Inc. Reflecting on the benefits of their collaboration as well as the distinctions of their respective institutions, this panel of Principal Business Officers from Amherst, Mount Holyoke and Smith Colleges, and the University of Massachusetts at Amherst will share their ideas, successes and challenges in response to recent economic conditions, resource limitations, sustainability, facilities re-investment and the Five College Consortium.

CAMPUS TOURS

1:30 PM–4:30 PM

(N11T01) UMass Amherst Southwest Concourse Tour: Retrofitting a Campus Landscape

The Southwest Concourse is a comprehensive landscape and utility revitalization of a five-acre pedestrian core on the University of Massachusetts-Amherst campus. As the largest residence complex at the university (5,000 students), the design strategy offers a new model for retrofitting an historic campus landscape through innovative stormwater management and state of the art technology. The project involves the remediation of hazardous materials and implements a matrix of bioswales, rainwater gardens, permeable pavement, recycled materials, and a native plant palette that reflect the character and unique ecology of the Connecticut River Valley. Currently in construction, this project is a living laboratory for on-campus education and a case study for schools and universities facing similar revitalization projects.

LEARNING OUTCOMES:

1. Recognize the significance of landscape in increasing the sustainability of a campus.
2. Identify the range of options for revitalizing a landscape to increase its educational and sustainable features.
3. Evaluate the use of storm water management, bioswales, native plantings, rainwater gardens, and permeable pavement in preserving and enhancing an historic campus landscape.
4. Describe the role of technology in enabling the creation of sustainable landscape features.

Separate registration required.

1:30 PM–4:30 PM

(N11T02) Mount Holyoke College Tour

This tour includes the Kendade Science Center and the Blanchard Campus Center. Kendade is a four-story, 40,000-square-foot building that serves as the heart of a unified science center, connecting the existing Carr and Clapp laboratories and Shattuck and Cleveland halls. Kendade houses classrooms, faculty offices, and laboratories, including labs dedicated to molecular biology and genetics, advanced physics, and optics. Completed in 2003, the \$36-million science center provides 116,000 gross square feet of new and renovated space and is home to eight departments: biological sciences, biochemistry, chemistry, physics, mathematics, astronomy, earth and environment, and computer science. The Blanchard Campus Center is a wonderful meld of modern appointments and the warm heritage of Mount Holyoke College. Renovated and expanded in 2003, Blanchard Campus Center is a meeting place for the entire Mount Holyoke community.

LEARNING OUTCOMES:

1. Recognize the key features of a facility that enhance its use as a unified science center.
2. Review the differing requirements for student and faculty laboratories in multiple scientific disciplines.
3. Evaluate the options for renovating student centers that increase their centrality to campus life.
4. Compare the design decisions involved in creating an interdisciplinary science facility that includes both renovated and new space.

AIA 2.0 units

Separate registration required.

1:30 PM–4:30 PM

(N11T03) Smith College Tour - Ford Hall

Capitalizing on a four-decade legacy of leadership and innovation in science education, Smith College has built a science and engineering facility that will intentionally blur the boundaries between traditional disciplines, creating an optimum environment for students and faculty to address key scientific and technological developments of our time. Both a structure and a symbol, the new home for the Picker Engineering Program, computer science, chemistry, biochemistry and molecular biology, will be a compelling, visible statement of Smith's public identity as the women's college with the strongest programs in science and engineering. Ford Hall is named in honor of the lead donor to the project, the Ford Motor Company Fund. Through its Advanced Education Program, the Ford Fund supports programs that emphasize diversity in engineering and business and link classroom learning with real-world projects and issues. In addition to its symbol as a scientific beacon, it is also a significant sustainability project. The final recycling report for the Ford Hall project notes that 96 percent of the waste generated by the project, including the buildings that were removed to clear the site, was recycled. This is an extraordinary accomplishment for a building of Ford's scope and scale.

LEARNING OUTCOMES:

1. Recognize the range of funding possibilities for science buildings that serve students under-represented in science and engineering disciplines.
2. Recognize the key features of a facility that enhance its use as an interdisciplinary science and engineering center.
3. Evaluate strategies for recycling and reuse when a new building is being erected. Strategies in this project allowed 96 percent of the waste to be recycled.
4. Review the requirements for a building that allows optimal use for both student and faculty research.

AIA 1.0 unit

Separate registration required.

For all North Atlantic Region Information:

WWW.SCUP.ORG/REGIONS/NA

Thank you to our volunteers for their hard work and dedication.

NORTH ATLANTIC REGIONAL COUNCIL

Chair

Trina Mace Learned
Northfield Mouth Hermon School

2011 Spring Conference Co-Chair

Minakshi Mani Amundsen
Cornell University

2011 Spring Conference Co-Chair

Robert C. Hicks
Symmes Maini & McKee Associates

2011 Spring Conference Co-Chair

Debi Lacey McDonald
Cannon Design

Community College

Representative

Lenell Kittlitz
Connecticut Community Colleges

Communications Chair

Frances M. Gast
University of Connecticut

Membership Chair

Robert J. Joy
JMZ Architects and Planners, PC

Sponsorship Chair

Charles N. Tseckares
CBT/Childs Bertman Tseckares, Inc.

Volunteer Chair

John R. Benson
Massachusetts Division of Capital
Asset Management

At-Large

Elizabeth J. Anderson
Yale University

At-Large

John Shreve Arbuckle
Hoffmann Architects, Inc.

At-Large

Pamela Palmer Delphenich
Massachusetts Institute of
Technology

At-Large

William P. Flynn
Saucier + Flynn Landscape
Architects

At-Large

Roland Proulx
University of Montreal

At-Large

Thomas M. Rathbone
State University of New York
College at Oneonta

At-Large

Alexandria Roe
University of Connecticut

At-Large

Linda E. Seavey
University of Vermont

At-Large

William R. Tibbs
Boston College

At-Large

Maria I. Wilpon
BL Companies

*Thank you to our local host volunteers at University
of Massachusetts Amherst and Amherst College.*

Steve Ball

ISB Building Manager

James D. Brassord

Director of Facilities,
Amherst College

Yvonne Kielb

Project Manager and Operations
Coordinator, Facilities

Darcy Lohr

Clerk, Facilities

Ludmilla D. Pavlova-Gillham

Senior Facilities Planner, Campus
Planning

Steve Pielock

Manager, AIMS Classroom
Tech Support, Information
Technologies

Tom Shaw

Assistant Director of Design and
Construction, Facilities

Janice Webster

Clerk, Facilities



**INTEGRATED SOLUTIONS
HOW & NOW**



JOIN US AT SCUP-46!

July 23-27, 2011
Gaylord National Hotel & Convention Center
National Harbor, MD, USA
(Just outside of Washington, DC, and Alexandria, VA)

Learn | Connect | Exhibit | Share | Advertise | Experience

Learn more at www.scup.org/annualconf/46

BRING SCUP'S PLANNING INSTITUTE TO YOUR CAMPUS

*"...this workshop allowed us to
create a sense of campus buy-in
that is priceless!"*

—Terisa Remelius, Vice President, Student Affairs,
Texas A & M University-Kingsville

Learn how the process of integrated planning can change your institution.
Soon you'll be agreeing with campuses that reported learning:

- how to create collaboration and teamwork
- more wholistic planning
- how to implement change

Find out how your institution can benefit from the planning institute!

Contact Phyllis Grummon at phyllis.grummon@scup.org.

Please be sure to thank our sponsors!

GOLD COLLEAGUE

Daniel O'Connell's Sons

www.oconnells.com

Haley & Aldrich, Inc.

www.haleyaldrich.com

Langan Engineering & Environmental Services

www.langan.com

Structure Tone

www.structuretone.com

Symmes Maini & McKee Associates, Inc.

www.smma.com

The Whiting-Turner Contracting Company

www.whiting-turner.com

VHB/Vanasse Hangen Brustlin, Inc. ★

www.vhb.com/education

SILVER COLLEAGUE

ARC/Architectural Resources Cambridge

www.arcusa.com

BL Companies

www.blcompanies.com

Bohler Engineering

www.bohlerengineering.com

Cosentini Associates

www.cosentini.com

Cube 3 Studio Architects

www.cube3studio.com

Hill International, Inc.

www.hillintl.com

Lutron Electronics Co., Inc.

www.lutron.com

Newman Architects, LLC

www.newmanarchitects.com

Nitsch Engineering, Inc.

www.nitscheng.com

URS Corporation

www.urscorp.com

Windover Construction

www.windoverdevelopment.com

BRONZE COLLEAGUE

Columbia Construction Company

www.columbiacc.com

Erland Construction, Inc.

www.erland.com

GZA Geoenvironmental, Inc.

www.gza.com

Herman Miller, Inc.

www.hermanmiller.com

Howard/Stein-Hudson Associates, Inc.

www.hshassoc.com

Shepley Bulfinch

www.sbra.com

The Care of Trees, Tree Preservation + Land Restoration

www.thecareoftrees.com

Timberline Construction Corporation

www.timberlineconstruction.com

★★ Grand SCUP Supporter

★ Major SCUP Supporter