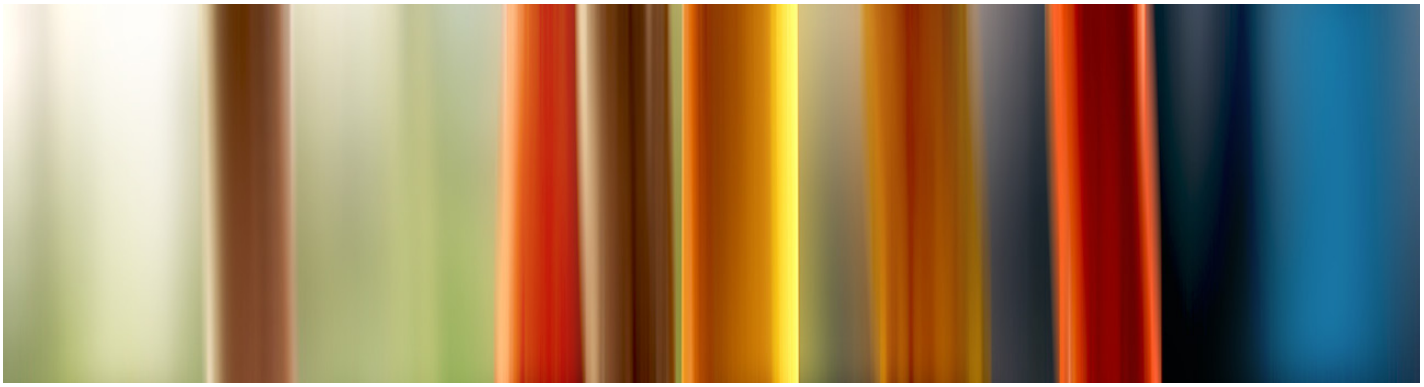
Society for College and University Planning
INTEGRATED PLANNING FOR HIGHER EDUCATION

Society for College and University Planning

Academy Council Report to the Board

JANUARY 2012



INSTITUTIONAL DIRECTION PLANNING ACADEMY

ACADEMIC PLANNING ACADEMY

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Academy Council Report 2012

Introduction

This report synthesizes the trends observed by participating members of SCUP's planning academies through the concurrent session proposal review process for SCUP's annual, international conference and idea marketplace.

In 2010, the SCUP Board of Directors established the Academy Council, a new standing committee comprised of the conveners and associate conveners from each of SCUP's four planning academies: institutional direction, academic, facilities, and resource and budget.

At the time the committee was established, the academy leadership's primary focus was the oversight of the review process for concurrent session submissions to the annual, international conference.

The board asked the academies to expand their existing focus to develop a way to harvest information about overarching themes, sector trends, and emerging issues that might be identified through the review process, so that it can be shared and used strategically by the board and SCUP's numerous working groups.

> **To share, in a coordinated and integrated manner, the wealth of knowledge, expertise, and information throughout each academy with the board, core committee structures, programs, and services of SCUP**.

This document is intended to be a flash report of the continuing and emerging issues of interest to SCUP. It's a reflection of what is resonating in the minds of academy members as they participated in the SCUP–47 proposal review process, and of those who want to contribute to SCUP's body of knowledge through their program submission. The report works to identify some of the shifts in thought that may prove important to those interested in integrated planning processes.

Methods

A total of 253 concurrent session proposals were submitted for consideration for SCUP–47. Each submission was read and assigned a topic sub-tag by the four academy conveners, who then came to a consensus on the topic assigned to each one.

All 91 members of SCUP's four planning academies participated in the review and evaluation process. Each member saw every proposal that was within their assigned topical areas, so they could identify emerging ideas and determine "best in class" for further proposal consideration.

Fifty-two academy members accepted the invitation to contribute to SCUP's knowledge beyond the reviews of concurrent session submissions by participating in this year's broader scanning initiative. They either participated in one of eight follow-up interviews with an academy convener, or a short survey that probed their observations in these areas:

- Continuing trends
- Emerging trends (innovations and advancements that they had not seen before)
- What they observed as an emerging trend in their own professional environment
- Fading trends—what are they seeing less of?
- What they struggle with—what presents their biggest concern/fear?

Their remarks, observations, and thoughts were synthesized by the academy council, who identified top trends or themes—essentially their "top seven" list. This information forms the basis of this year's first academy council report to the board.

SCUP–47 Key Theme Areas:

The seven theme areas represent the key topical groupings synthesized from concurrent session proposals submitted for review. The sub-headings below each theme area illustrate many of the topics discovered or mentioned through the SCUP–47 proposal review process and interviews with academy members. Each theme area includes a final section, entitled *"Additional Program Opportunities"*, which are current issues that invite continuing discussion or developing concepts and ideas that will demand our attention in the future.

1. Integrated Processes

An integrated process is a proactive approach to planning that supports decision-making and policy-formulation processes in holistic and systemic ways that cross functional and operational boundaries. It incorporates the tools, processes, and other initiatives that increase collaboration, coordination, and synergies across an institution to include academic plans and programs; operational improvements; fiscal and budget innovations; and organizational, structural, and leadership initiatives involving student life issues, human resources, space management, and information technology.

Strategic Integration

- Institutional planning—short- and long-term planning processes supported by gathering, analyzing, and converting data into useful information; new business models to maximize progression toward strategic goals
- Integrated program review
- Environmental sustainability planning that engages the entire campus and links renewal energy practices, physical plant, finance, curriculum, and budget planning into a feasible institutional strategy
- Integrating academic assessment (e.g., student learning outcomes assessment) with institutional planning efforts, budget, enrollment planning, and curricular planning
- Emergency/crisis/disaster planning and response on a campus-wide level; emphasis that the value of effective planning is most evident during times of upheaval and disruption

Tactical Integration

- Institutional pre-project planning and positioning specific building projects in alignment with long-term strategies and goals before engaging the design team.
- Facility planning and design (i.e., analyzing the operational impact of new construction at energy, curriculum, budget, and finance levels)
- Integrated processes—ranging from planning to project delivery, with focus on collaboration and broad engagement among departments and disciplines

Tools & Approaches

- Alternative approaches to creative problem-solving like "design thinking"
- Performance-driven space programming replacing functionally-driven approaches
- Analytical approaches to facility master planning
- Growing use of Building Information Modeling (BIM) in integrated design processes
- Benchmarking against other institutions (nationally and internationally) for validation and inspiration

Additional Program Opportunities

- Reality of integrated planning—the problems of actually doing it; use of case studies to extract lessons; need to see ideas and concepts of integrated planning that includes course and curriculum integration
- Greater understanding of what integrated planning is and how it works
- Need to address strategic planning in more depth to understand what it really is—how do we make it a living document? Who drives the strategic plan?
- Creating cultural changes on campus that facilitate the building of inclusive institutions; increasing diversity on campus
- Ways to orientate leaders to the merits of integrated planning and how to maintain a long-term strategy
- Identification of processes that accommodate "flexible customization" in the future
- Are there new, and perhaps even non-traditional, approaches toward strategic planning in organizations that can be incorporated in higher education?
- Facilitating large-scale change transformation

2. Academic Planning and Institutional Effectiveness

Faculty deliver an instructional mission of the institution and, as such, are a key part of the academic planning process. Colleges, units, departments, and the overall institution make decisions about which programs will be expanded, maintained, or diminished. Administrative program review is becoming as important as academic review in the overall assessment of institutional effectiveness.

Increasing Reliance on Data and Outcomes for Decision-Making

- Increasing government and public demand for accountability in higher education
- Increasing emphasis on assessment of student learning: focus on outcomes (e.g., graduation rates) vs. inputs (e.g., enrollments, 1st year retention)
- Continued importance of data-driven academic and administrative program review and prioritization for both assessment of effectiveness and for possible reduction/reallocation opportunities.
- Accreditation requirements

- Americans with Disabilities Act (ADA) regulations—hot topic because of new requirements; consider hearing or visual disabilities—by looking at that population subset, you can learn a whole lot about how your other systems function
- Linking academic planning to learning outcomes
- Creation of large, inclusive university databases for planning and accreditation purposes

Curriculum/Pedagogical Trends & Innovations

- Trend away from Socratic method and toward student engagement, especially with developing learning environments, which foster student engagement
- Interdisciplinary/inter-professional education
- What value does higher education add? (e.g., increases in skills such as critical thinking)
- Impact of space on human behavior ("psychology of space")
- Impact of classroom design on learning outcomes
- Student engagement and retention an ongoing concern
- Truly adopting a "culture of evidence" on campus—taking it from a regulatory requirement to everyday business practices

Additional Program Opportunities

- Use of data analysis and predictive analytics in decision-making; expanded need to share research
- How to include all students (not just those that can afford it, i.e., traditional students) in learning
- Novel and experimental ways of teaching and how that impacts space
- Innovative ways to build student success rate and completion
- Ways to create an inclusive learning culture across the institution
- Creating inclusive learning/living environments for international students
- Ways to improve the effectiveness of the academic mission: outcomes, assessment, space alignment, and the understanding of who our clients are and what do they want?
- Impact of distance education and hybrid courses on learning
- Remedial education for student readiness
- Ways to build opportunities for the mentoring of minority students, faculty, and administrators to nurture their professional development
- Methodologies for identifying priorities to ensure that money is invested in support of strategic objectives
- Research that examines how incorporating mannequins/simulations in training affects learning and work behavior
- The future of international education in difficult financial times
- Integrating international students into student life
- Employing process-mapping for efficiency

3. More With Less

The topic of "more with less" was the most commonly referenced theme throughout the SCUP–47 review process, reflecting the common institutional need to stretch scarce resources and to be increasingly more efficient in providing existing services. The state of the economy and the funding challenges facing both public and private institutions have challenged everyone to accomplish both their operational and learning goals with fewer resources. Higher education institutions will need to exercise innovation and creative thinking on the highest levels.

Resource Sharing

- Emphasis on sharing scarce infrastructure and physical assets
- Emphasis on focusing scarce resources on strategic objectives
- Sharing administrative resources across institutions as a way to reduce costs
- Public/private partnerships that address service issues (i.e., sharing of police force)

Management Processes

- Application of lean process improvement techniques to increase efficiency and reduce costs in institutional processes
- Increasing emphasis on building reuse/renovation vs. new construction for both monetary and sustainability reasons
- Application of principle-base planning: principles that are adaptable to an ever-changing landscape, and allow workplaces to be flexible and creative in their decision-making
- Doing more with less—this may devolve into doing less with less (becoming more focused) as the current economic condition becomes the new reality
- Renewal, sustainability techniques—how do you take care of existing buildings when you are charged with doing more with less? (example of innovative project in this area: applying lean techniques to squeeze waste out of an existing system to apply to preventive maintenance projects on their campus)
- Alternative project delivery (e.g., LEAN Construction, integrated project delivery, design build)

Additional Program Opportunities

- Lessons that draw upon multiple projects to reinforce an identified principle of good planning and management
- Where to find the funds to support education
- As you increase diversity on a campus, how, and from what source, do you reallocate resources to fund that initiative?
- Effective redeployment of resources based on strategic goals

4. Collaboration / Partnerships (External and Internal)

Public-private partnerships encourage flexibility in planning and growth, and create opportunities to build institutional infrastructure without leaving the funding burden solely on institutional budgets. Community engagement is part of many institutional missions to foster students' commitment to contribute to society and to educate them about the fundamentals of civic engagement. A growing educational focus is to improve higher education linkages with K-12 and industry that address college readiness issues and regional workforce talent needs.

Increased Community Engagement

- Greater involvement of the community in an institution's strategic planning, education, and use of resources
- Colleges aligning their priorities with local economic development strategies
- Integrating community and institutional master plans
- Forging more public/private partnerships, intra-agency partnerships, etc., towards fulfilling common community/state goals and interest
- Workforce development—partnerships between private-sector business and higher education to retrain
- Educational partnerships with the community, particularly in ways that improve and enhance the student's learning experience (e.g., partnering with museum or art gallery)
- Planning and design—how to take it from an insular process to a more inclusive one with students, community members, and across disciplines

Cross-disciplinary and Interdisplinary Initiatives

- Growth of cross-disciplinary and interdisciplinary academic units: programs, centers, institutes
- Collaboration among the owner, the contractor, and the design professionals
- Designing laboratories for the use of "core equipment" concept (reduce duplication of expensive scientific equipment)
- International collaborations
- Working across specialties and disciplines
- Bringing in the academic perspective; demonstrating intent to be inclusive
- Assessing impacts of outsourcing/concessioning non-academic activities
- Public-private partnerships that go beyond an alternative financing source for new construction
- Multi-disciplinary and cohort training—particularly in the health sciences, but also in science and engineering

Additional Program Opportunities

- Collaborations between community colleges and four-year institutions (some systems combine two- and four-year schools)
- Educational collaborations with industry for career pathways—collaborations that identify necessary skills for success, and re-engineer it back from college to high school, to ensure the talent pipeline for a knowledge-based market
- Increasing awareness of the foresight and planning necessary now to be competitive for Federal government grants, especially workforce grants (i.e., required collaboration across agencies; shrunk window for developing and writing)
- Increasing opportunities for student civic engagement in their communities
- Integration of internships and field experiences as part of the educational process
- How diverse cultures look at: space, learning, international study, and the value of higher education

5. Emerging Technologies and Their Impact on Teaching and Communication

Ever-expanding use of technology in higher education has gone beyond administrative purposes to systemically change the delivery of teaching and learning with lightening speed. Institutions face a myriad of challenges as they keep pace with technological innovation, weigh its impact on learning environments, and explore how to create a sense of place that merges physical and digital boundaries.

Technology and Learning

- Technology integration in the learning process (how to use and leverage technology in an affordable manner to improve learning outcomes)
- Use of technology to increase learning outcomes or increase administrative efficiencies vs. technology for the sake of technology
- Need for better methods of projecting the effects of virtual/online/hybrid learning pedagogies on future campus space needs, as well as on instructional effectiveness
- New applications for technology in the curriculum

Introduction of New Communications Technologies

- Continued development of flexible and accessible communications technologies
- Reality of 'bring your own device' and the need for ubiquitous wireless access with its associated security and cost issues

Additional Program Opportunities

- How will the wireless generation approach learning—what do we need to do to accommodate this?
- Impact and potential of "inside-out learning", enabling students to "discover" learning points for themselves, working at their own pace using outside instructional resources to augment a structured learning environment (e.g., Kahn Academy, Udacity, MITx, etc.)
- Technology integration in the learning process—how can we use and leverage technology in an affordable manner to improve experience and learning outcomes?
- Advent of student accountability through technology—its impact on attendance and engagement
- How can technology improve student readiness for college and improve access?
- Growth of online learning, and the implications on bricks and mortar; what do learners get from universities and colleges that are not available on-line?
- Hands-on training with new technologies that improve planning processes
- Social networking and privacy issues

6. Institutional Sustainability

The viability of a college or university relies on its ability to effectively lead change according to its strategic plan, use good data in its decision-making processes, and allocate resources accordingly to ensure the institution's performance and effectiveness meets its academic mission. Institutional leaders face increasing challenges to identify new revenue streams, manage the increasing influence of external stakeholders, answer the calls for greater accountability, and to seek innovative means to sustain the enterprise of education.

Strategic Stewardship

- Institutional risk management planning
- Developing strategic document management plans
- Completely rethinking the structure of higher education
- Considering the viability of some campuses for potential merging with other institutions or closing the campus
- Taking a more entrepreneurial approach to education
- Growing demonstrations and protest/unrest—need to keep our eyes on this since much of it is prompted by financial issues, also questioning the value of having a degree, especially graduating and not having a job
- Prioritization of programs; need for discussion at a more strategic level—redeployment of personnel and funds

Advances in Financial Management

- Planning that addresses a more "flexible organization" that is able to both shape and react to external environmental/ developments

Additional Program Opportunities

- Creative/compliant financial planning given the current and projected fiscal environment (e.g., 100 year bonds; new forms of external revenue generation)
- Avenues for funding strategic priorities
- Changing professorial model of class teaching times; tracking the cultural changes that are occurring and sharing the approach
- Employing new business processes (economic and service issues impact this) from management structures to sustainability
- Risk-driven vs. risk-aware institutions
- Planning for institutional change
- How do you build/maintain a culture on campus?

7. Use/Evaluation of Physical Space, Physical Plant

Colleges and universities are evaluating their physical infrastructure and how their campuses can meet the learning requirements, interests, and expectations of today's students, while facing the challenges of rapid technological innovation and change, the need to support new learning styles, demands of environmental sustainability, and the decline of funding levels. New construction has slowed on many campuses, and aging infrastructures are prompting renovation and re-purposing of buildings to better utilize available space.

There is recognition that student "learning" is not limited to the classroom and it takes place broadly across the physical environment, impacting learning behavior and peer-to-peer interactions. Cross-disciplinary collaborations are building demand for flexible spaces. Physical planners have adopted many integrative approaches to engage stakeholders in the design of contemporary learning environments.

Aging Infrastructures

- Disaster planning (with an aging infrastructure across our nation's higher education campuses—how do we plan for disasters without exposing ourselves for liable risk
- Value-added critical maintenance (renewal and replacement)
- Replacing/re-purposing 1960's "baby-boom" buildings
- Strategic re-purposing of existing facilities rather than new building; renovating abandoned buildings in urban areas or re-purposing land for educational use
- Rejuvenation of existing buildings

Continued Trend Toward Flexible Space

- Different disciplines sharing space in one building as opposed to having their own buildings (especially sharing expensive laboratory space)
- Workspace design that promotes and stimulates collaboration
- Learning environments that support teaching hybrid courses
- Ubiquitous work space (conducting college/university work anytime, anyplace)
- Shared, flexible space for conducting sponsored research
- Continued evolution of libraries to learning centers
- Continued evolution of distance/online learning (addressing the needs of the physical campus in a virtual and digital age)
- Facility management—how to manage flexible space effectively for maximum utilization (understanding the true cost of flexibility)

Increasing Demand for Assessment of Physical Space Toward Student Learning

- Planned vs. serendipitous student collaboration
- Effectiveness of collaborative spaces
- Increased understanding of space utilization rates by senior officials—system accountability and space charging
- Utilization of space: how to assess what you have to get a better utilization through compaction, densification, or integration of function—possibly to set the stage for a renovation project
- Space audits; making better use of space a common concern
- Redesigning student housing to accommodate learning and social needs of first year students (one measure... increased retention)
- Post-occupancy Evaluation (POE)—architect re-evaluation of the design after it's built
- Sustainability (beyond building more efficient buildings, identify the return on the investment and economic impact of the higher education enterprise and how updated/new buildings are a significant variable in the return)
- Tremendous investments in residential life programs (housing, dining, and programmatic spaces)
- Considering time value of campus space and how to value/price a space based on its demand
- Application of the new acoustic standard ANSI 12.60

Space Assessment

- International learning space benchmarking
- Utilization: so little money for new facilities, people are rethinking what they have and how they use it, particularly thinking about the next generation of students

Environmental Sustainability

- Urban farming, or farming on campus, and the connections it fosters between campus and community
- Net zero as a new direction for building standard; more focus on energy use; forward looking to the Living Building Challenge
- A sustainability re-focus: emphasis is on results of the initiatives and whether they have been successful or not, not whether we need it
- Results of sustainability planning now online after years of conceptual discussion; strong focus on energy reduction rather than broader implications for sustaining the planet
- Increased use of metrics and performance measurement before beginning design to optimize building performance
- Partnerships with third-parties like equipment manufacturers to achieve sustainability goals.

Community Space / Sense of Place

- Including landscape more in master planning, not as a backdrop to buildings but as spaces to delight and hold community in themselves
- Creating a sense of place beyond the physical environment, incorporating ever-changing physical and digital environments

Additional Program Opportunities

- Research on the sociology of space (what's effective; how it's perceived)
- Renewal from a sustainability standpoint
- Research that assesses new kinds of learning spaces—what is really working? How effective are these spaces?
- Hybrid learning—how does that affect the design of your learning spaces?
- How existing buildings are being rejuvenated
- How can colleges and universities lead in developing strong Minority Business Enterprises (MBE) and Women Business Enterprises (WBE) education and advisement to build stronger and more diversified participation in planning, design and construction?
- Post-occupancy evaluation assessment (crossing facilities, industry, and academic backgrounds)
- Evidence-based design—collect enough raw data to make conclusions
- Consolidation and reducing your footprint—what would a college or university do with the excess space?
- Functionality of the classroom: auditory, sensory—are we providing the best box for the learning process?
- An honest analysis of facilities that save energy, but fail as places for learning and living
- Space system reclassification to accommodate the emergence of collaborative spaces as an identifiable space type

- Ways to keep campus master plans alive to inform new facility decisions—and driven by real knowledge and metrics
- Re-emergence of residence hall design that encourage meeting other people; new advances in living/learning facility design
- Advances in water conservation and biomass (waste stream) management

To Create A Dialog

It is hoped that this document will add to a growing number of resources that contribute to the development of robust programming and resources for SCUP. This snapshot of observations from academy members is meant to create dialogue and foster further investigation by the readers. It also begins to record the shift in the topics of interest to SCUP members and affiliates.

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