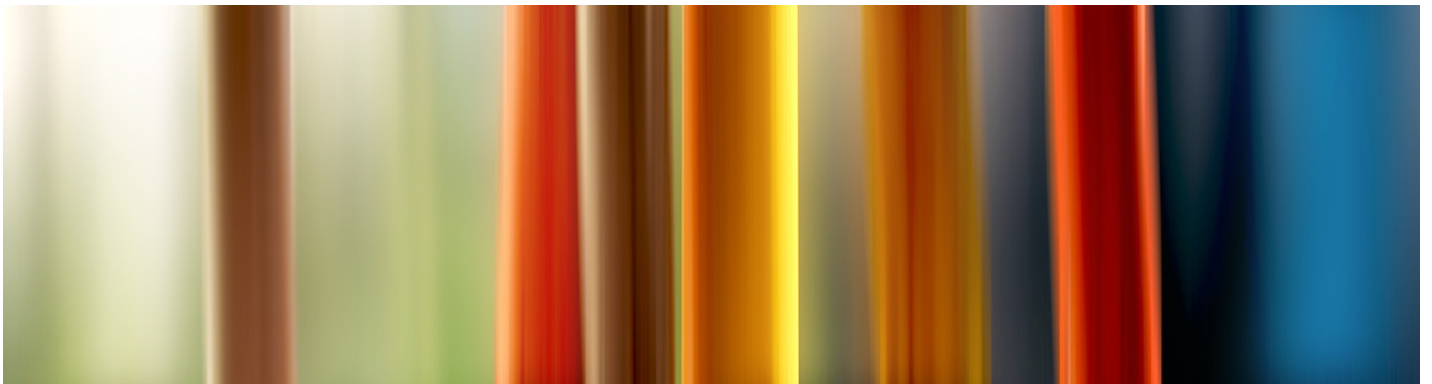




Society for College and University Planning

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# SCUP Academy Council: Report on Trends in Higher Education Planning



INSTITUTIONAL DIRECTION PLANNING ACADEMY

ACADEMIC PLANNING ACADEMY

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# Society for College and University Planning SCUP Academy Council: Report on Trends in Higher Education Planning 2013

## Introduction

This report synthesizes the trends observed by more than 90 members of SCUP's planning academies through the 2012 fall concurrent session proposal review process for SCUP's 2013 annual conference.

This document is 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 the academy members who participated as reviewers for the SCUP-48 concurrent proposal selection process, and of those who want to contribute to SCUP's body of knowledge through their program submission.

## Background

In 2010, the SCUP Board of Directors established the Academy Council, a 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. The board asked the academies to expand their proposal review focus for the annual conference 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.**

## Method

A total of 219 concurrent session proposals were submitted for SCUP-48 consideration. All 107 members of SCUP's four planning academies contributed their expertise during the review and evaluation process.

After the review process, more than 90 academy members contributed to SCUP's knowledge by participating in this year's broader scanning initiative. They either participated in one of 15 follow-up conference call interviews with an academy convener, or a 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 they saw less of?
- What they struggle with—what presented their biggest concern/fear?

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

\* For detail on the concurrent session proposal review process for the annual conference, visit: <https://www.scup.org/page/leadership/academies/annual-conf-review>

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## 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 topics discovered or mentioned during the SCUP-48 proposal review process and during interviews with academy members. Each theme area includes a final section, titled "*Opportunities for Conversation*," which are comments made by academy members on current issues that invite continuing discussion, or developing concepts and ideas that will demand our attention in the future.

### 1. Disruptive Change

- Forces of Change
- Pace of Change
- Experiment/Adapt
- Resilience
- Enterprise Risk Management
- *Opportunities for Conversation*

### 2. Institutional/Educational Effectiveness

- Increased Levels of Accountability
- Strategic Planning
- Assessment and Planning
- Need for Good Data to Support Decision-Making
- Time to Completion
- Accreditation, Certification, and Licensure
- Academic Program Review and Planning
- *Opportunities for Conversation*

### 3. A Focus on the Student

- Access to Higher Education
- Relevance
- Enhancing All Aspects of the Student Experience (space, teaching, technology, global citizenry and events, housing, student life)
- *Opportunities for Conversation*

### 4. Stewardship of Resources

#### A. Space

- Effective Utilization of Space
- Transformation/Repurposing of Facilities
- Managing Deferred Maintenance
- Transformation of the Libraries
- Risk-sharing and Tightening Access to Capital Driving Alternative Project Delivery Approaches

## Key Theme Areas (continued)

### B. Managing in Our New Financial Realities

- Focus on Enrollment Management
- Continuing Drop in Funding Levels/Impact on Operating Budgets
- Focus on New Revenue Sources
- *Opportunities for Conversation*

### 5. Engagement and Inclusiveness in the Planning Process

- Collaboration & Partnership Proliferations
- Community Colleges—Partnerships Around Degree Programs
- *Opportunities for Conversation*

### 6. IT and the Classroom

- Technology
- Pedagogy & Teaching Models
- Impact on the Learning Space
- *Opportunities for Conversation*

### 7. Environmental Sustainability

- Sustainability Prominent, Becoming Ubiquitous
- Net Zero—The New LEED?
- Emphasis on Building Performance
- *Opportunities for Conversation*

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# Society for College and University Planning SCUP Academy Council: Report on Trends in Higher Education Planning 2013

## 1. Disruptive Change

The reality of competition in the marketplace and the overall economy has forced higher education to re-examine its position and adapt. Perhaps the mood is better on the economic front, but there's been no room to relax. Alternative (and free) educational delivery platforms, new ventures and players, dramatically decreased governmental support, greater accountability, and increasing regulations have challenged the traditional higher education model. The paradigm shift among higher education institutions is recognizing the need to change while also recognizing the need to maintain as much of the traditional higher education model as possible. The multiple drivers of disruption have prompted the reimagining and reshaping of higher education.

### Forces of Change

- Continued loss of public financial support for higher education—while at the same time being asked to reduce cost and simultaneously educate more students to a higher standard
- Major shifts in college and university operational environments—more political influence, huge enrollment demands, and questions about how colleges and universities are measuring their value
- Changing leadership models: senior leaders come and go quickly, and desire to leave a legacy in the short term; planners work within the framework of constant management change
- Fear that one's institution lacks a clear path forward, lack of institutional confidence for making long-term decisions, lack of responsibility, or the innovative capacity to chart a course—resulting in a long-term state of financial stress and underperformance, or inability to hold or reduce the cost of higher education
- Ongoing budget reductions, staff reductions—lowered staff morale, compounded by increasing work loads
- Not enough work to support the AE (architectural engineering) community; unemployment remains higher in the AEC world than elsewhere. Graduating students are forced into other industries and may never return
- Increased costs of producing a high-quality education in an environment of anytime, anyplace, and *free* online learning; colleges and universities no longer have a monopoly on higher education
- For-profits have taken a chunk out of a large segment of the market that traditionally may have been ignored

- States are using tools at their disposal to push institutions to achieve their desired outcomes (tuition-increase ceilings, approval for capital, funding formulas, state financial aid), as well as increased regulation; legislators are thinking about funding away from traditional methods (e.g., use of formulas) to incentive funding
- Politicians may not understand the value of an institution's particular mission, resulting in cutting research or other areas critical to an institution's framework and mission

### Pace of Change

- The management of change; how do you address ALL of the initiatives/changes that are on your plate at the same time: reaffirmation, budget cuts, enrollment challenges (enrollment *growth* as well as enrollment decline)
- Struggles to keep up with innovation and how fast things are changing; always behind in the information gathering and sharing with the people here on campus
- Rapid changes in university governance structures; addressing resistance by some generations of faculty to reconsider what learning will look like

### Experiment/Adapt

- Significant investment of effort to discover different and more creative ways to get things done on campus—doing more with less; trying to be smarter with what we have; borrowing corporate tools/approaches to help with change
- Not business as usual—every building project now has a change management component in it, frequently helping occupants adjust to a different kind of work environment
- Institutions are trying to backfill a drop in applications and tuition loss with more foreign students; there are 125,000 well-prepared students coming from China alone each year
- Staff preparation for campus change on a broad scale with change management training and techniques
- Finding creative ways to fund non-revenue generating projects on campuses
- Refining planning and management tools to be more assertive, efficient, and competitive in the educational market; plus new directions in the technology sectors that address space planning, facilities design, and campus and community planning have applications to campus planning effectiveness
- Many small institutions have no investment for any type of construction and must rely on what they have—regardless how bad it is
- Institutions hunkering down to find solutions themselves before the legislature or other group tells them how to do it

- Escalating interest in the internationalization of higher education, ranging from increasing the global perspectives and exposure of students, to exporting academic offerings beyond the home country
- Setting up of substantive offshore operations, to deliver on education and research objectives; continue to effectively plan in an environment of continual financial cuts and uncertainty
- Architecture firms are changing to respond to the storminess of the funding side of institutions

## Resilience

- Given the groundswell of concern several years ago about the economy, the level of anxiety is not as high
- It's not all about monetizing everything about higher education; we are also talking about return on investment and how we all contribute to the larger university
- Continued focus on working smarter not harder
- Short-term pain generated by change management has been an underestimated challenge; things will get better, but in the short term it's hard
- Recognition that the American higher education system is a valuable brand, and we underestimate its value on the world market (especially as the demographic shift and the echo boom search tails off)
- Facility utilization focuses on making do with what we have as opposed to building more
- Campus master plans have a shorter time horizon and are more focused
- Enrollments are declining, but the good news is that the economy is picking up

## Enterprise Risk Management

- New focus on the whole area of enterprise risk management, to develop plans to assess and manage risk; increase accountability
- Many new threats to network and information security
- New focus on the need for contingency planning and crisis response: campus violence, building security/ safety has become a front-burner subject; with national gun-control debates, expect to see significant facility and operational discussion on building security/safety
- Katrina, Hurricane Sandy, and other disasters impact multiple institutions on a vast scale; institutions challenged to keep plans and strategies used for catastrophes alive so they are ready to be employed during the time of need

- Risk-adverse management is an emerging trend to shift responsibility over to the development community
- Campus balancing acts: public access to campus vs. security/safety issues; confidentiality of privacy vs. pervasiveness of communications

### *Opportunities for Conversation*

- Crystal ball: what's ahead in the next 10 to 20 years for higher education?
- What are the implications as the world market develops and robust higher education systems begin in other countries?
- What will online education do to the financial sustainability of the institution?
- How will online programs that are not credit-based impact the social value of credentials at some point?
- How do you deal with cultural issues when culture hits the barrier of the increasing need to change quickly?
- Recovery from natural disasters—what private and public partnerships were formed; how were funds secured through the federal government to get them back to a place where they're stronger than where they were? Was there consideration on whether to reopen at all?
- What is the impact of international disasters on higher education, e.g., Japan's tsunami?



## 2. Institutional/Educational Effectiveness

Accreditation and legislatures have used institutional effectiveness as an umbrella for many causes. How one defines effectiveness may have more to do with the metrics available than their relationship to learning and student success. For example, 6-year, first-time student, graduation rates don't begin to define student success based on students' goals. Nevertheless, some measures of effectiveness—whether completion rates, value added, or lowest debt per graduate—exist for most institutions, around the world. Analytics may help, but beware that politicians hijack good measures for their purposes. The National Student Clearing House has done a service by helping aggregate student outcomes across institutions, but will it be enough to show that students do graduate...just not where they started.

### Increased Levels of Accountability

- Accountability is being infused into all areas, including the teaching and learning components; coming not only from state legislature but also the coordinating board in our own systems, driving institutions to be more strategic, effective, efficient, and sophisticated
- Legislative talk is about outcomes and the evidence. It's all evidence-based and lesser on inputs
- Benchmarking (e.g., National Community College Benchmark Project, academic analytics, the Delaware Study) employed as a tool for assessment, improvement, and accountability
- Accountability to control cost from a planning aspect evident on many fronts: from productivity of the researcher through grants to stay in their labs, to metering buildings so you know who is using the most electricity for potential charge-backs; employing multiple strategies to control costs
- Higher accountability for administrative decisions relating to capital projects and operations; roles are changing and being better defined

### Strategic Planning

- Recognition of the importance of strategic and integrated planning processes for affecting change
- Institutions are taking an interdisciplinary approach to planning as problems are becoming more complex; observing greater sophistication in strategic planning
- Greater engagement of people with different backgrounds and levels of experience on planning teams
  - Much broader internal and external stakeholder consultation
  - Increasing role for trustees and faculty in strategic planning
  - IT is becoming a greater partner in strategic planning and the development of institutional strategies

- Institutions doing a better job promoting the strategic plan and the core elements of that strategic plan to the entire campus; messaging back out for transparency and accountability of what is being done
- Getting real buy-in on planning is becoming more difficult, especially at the highest organizational levels; replacing this has been a significant increase in the use of analytics to inform decision-making
  - Faculty may not embrace initiatives such as strategic planning or assessment, but when they understand the value to it, they can become assessment champions and a voice for the institute with other faculty
  - Communicating the institution's difficult position is not going down well to those who have always has the resources they wanted
- Change management strategies are aligning people and culture
- Presidents leading strategic planning
- New innovation in planning techniques using social media; watch for more as experimentation with the fluidity of communications is harnessed by planners and their institutions
- Strategic plans are touching on how to ensure that the institutional mission is reflected in design elements, assessment, or other aspects of the institution
- Many approaches to finding a permanent home for integrated planning on campus—where can it be really effective? Decision is very much contextual to the campus, because in order to be done effectively, you need a champion with some authority to make people become transparent
- Greater inclusiveness also in the master planning process

## Assessment and Planning

- Observing a maturing and sophistication of assessment thinking; moving from the micro/'in the weeds'/testing orientation toward more macro/institutional focus
- Institutions working collegially to identify common measures or common means of assessment within their own system schools, so they can have some comfortable level of accountability, while at the same time allowing them to have their own freedom of assessing and providing results for their own campuses
- Institutionalization of assessment of student learning and institutional effectiveness (compliance to commitment); the onus of assessment as an add-on, not related to the work of the academy, has gradually shifted as meaningful results and use of results have been demonstrated
- Moving away from input-based assessment to outcome-based; accountability measures are more long-term (success measured by completion rates) vs. short term (retention of freshman class)

## Need for Good Data to Support Decision-Making

- Increased ability to harness and use big data for strategic purposes much easier than just a few years ago, so the expectations for having more concrete measures are higher
- Development of labor market research designed to align institutional programs and services more closely to the labor market; data used to develop new programs and services, while at the same time shedding outdated, low-use programs and services
- New academic programs are being developed and launched in ways that remain driven by faculty, but are guided by market research
- With more regulation, ability to capture vast amounts of documentation, and greater needs for accountability—workloads are increasing
- Emergence of 21st century analytics; data are available to us everywhere, often in ordinary transactions our students and others make. While processing of voluminous datasets has been around for some time, the key is how the techniques could be used in areas that have been traditionally considered to be difficult or impossible to analyze
- Repositioning of technology as a fundamental strategic tool for the institution; teaching people who are not in technology to think about technology as an institutional tool for strategic planning
  - Lots of need from an IT perspective in management of big data for storage, transport, manipulation, and access—it requires a different kind of environment, infrastructure, financing, security, etc.
- Institutional researchers are receiving a proliferation of questions and surveys from foundations and others; many requests to respond to outside agencies to interpret data for others
  - Enormous amounts of institutional data being produced, but there is frequent inadequate interpretation of its meaning that can be succinctly communicated to: anybody who could finance them, to parents, or to students themselves
- Data visualization—the graphic visualization of data may advance campus planning efforts; increasing topic of discussion
- Traditional retention studies focused on persistence—now instead embracing a full understanding of student academic progress and increasingly multi-institutional enrollment patterns

## Time to Completion

- Immense pressure to speed up student completion due to the cost of education
- Much stronger focus on retention and completion; institutions facing performance-based funding

- Three-year bachelors degree
  - The impact on community colleges is yet to be seen; how long do you stay in a community college to do that?
  - Many students are carrying more advanced placement “AP” credits—which translates to their only needing to attend closer to three years, rather than the traditional four years; lots of interesting ramifications to community colleges and four-year institutions

### **Accreditation, Certification, and Licensure**

- Higher inclusiveness by some accrediting bodies to engage colleges and universities effectively and substantively in pilot programs that could transform future reaccreditation
- Broad academic and administrative collaboration in the creation of an interdisciplinary curricular approach to learning, guided by their reaffirmation of accreditation requirement to develop a quality enhancement plan (initiative called Integrated Interdisciplinary Intentional Learning)
- Increasing impact of government demands, which drives standardization through accrediting bodies and potentially forces small institutions to get on board rather than encouraging their own approaches, which may be just as valid
- Institutional effectiveness processes to measure performance against mission receiving tremendous focus from accreditors, along with quality assurance and depth in education

### **Academic Program Review and Planning**

- Institutions continue to focus on the prioritization of existing resources in times of economic downturn as well as in time of growth
- Taking annual plans and integrating them into a program review process to consolidate processes, making the report more formative than summative

### ***Opportunities for Conversation***

- The challenges that minority-serving institutions have in today's environment
- Ways to link overall strategic, academic, facility, and finance planning—throughout schools, departments, and the overall institutional plan. More generalization and key strategies, and discussion on how to interpret plans
- Succession planning in higher education, and the trustee’s role in strategic planning
- Ways to link planning and budgeting, performance indicators, and measurements
- Discussions on how higher education must be used to make society more inclusive, the transformative power of education to bring minorities into the mainstream of society, and how education can remake the life of an impoverished person

- What are the issues and dynamics that surface in an academic prioritization process?
- Impact of outcomes-based funding that tie to statewide goals
- Techniques used for change management, in particular overcoming resistance, influencing mindsets, and dealing with politics
- How are senior leaders thinking about international, global developments?
- Do we need to redefine the value of a degree?
- What does a comprehensive plan look like?
- How do we keep a plan as a living document—more dynamic, and actually more changeable over time and still relevant?
- Not all planners have the luxury of the stars aligning in their planning process. How do you plan “on the fly?”
- How do you achieve your plans and stay relevant when you are fiscally strapped? What kinds of techniques are being used?
- How do colleges and universities effectively differentiate themselves?
- Shifting foundation of face-to-face learning to the proliferation of MOOCs and other distributed learning; how do you apply credit and how can that learning be assessed and measured?
- Address the enterprise and business of learning and what’s needed to support it
- How will President Obama’s community college initiative impact the graduation of students?
- The move to develop research relationships and collaborations with universities in countries where costs for researchers are less—as those countries develop their own higher education systems, what does that mean for our system and how do we respond?
- More focus on relevant content and substance of institutional plans, and the external and internal dynamics which plans must respond to; less focus on process
- What are the ways that data can inform decisions on tuition pricing, affordability, student debt, limitations of aid strategies, etc.

### 3. A Focus on the Student

Student needs are driving the current rapid pace and direction of the higher education reform. Their increased use of MOOCs and online universities are causing institutions to rethink their offerings—what kinds of degrees should be offered and how to credit online courses. Students' attention to social media and interactive hardware (cellphones, iPads) has driven course design and revolutionized the approach to course materials.

#### Access to Higher Education

- Increasing student discontent with high costs of education; students are carrying more of the burden through their tuition
- Early messaging to students down into the K12 pipeline so that they understand the probability of employment given this track, that track of learning
- Creating seamless transfers from community colleges to four-year schools
- Potential movement toward only enrolling students who have shown they can be successful (either through high school, community college, etc.)
- Levels of student financial obligation upon degree completion as a way of designing appropriate pricing/aid/advising strategies for students
- With reduced support from the government, students are leaving institutions heavily in debt or delaying and stringing out their education over longer periods of time to avoid/reduce the debt load

#### Relevance

- Continuing need for higher education to be seen as relevant—defined as graduating students in a timely manner and with minimal debt, and giving them a first-rate education that will help them become a competitive part of the workforce when they graduate
- Higher education also forced to prove its value; tuition cannot constantly be increased in the future without students realizing some adequate return on tuition investment
  - Students are evaluating various degree programs in relation to whether they can get jobs once they graduate with that degree
- Campuses feeling more economic pressure; students are actively resisting tuition hikes on some campuses, setting the planning process back, and impacting financial plans
- Still high recognition of the value of our higher education system through the eyes of prospective overseas students

## **Enhancing All Aspects of the Student Experience (space, teaching, technology, global citizenry and events, housing, student life)**

- Greater use of learning analytics: creating strategies and action plans that inform counselors and students themselves on ways to improve student success and completion
- Centralization of services has improved service to students; greater recognition of the importance of customer service
  - Improving the on-campus experience with better student service centers, learning resources, convenient parking structures, and technology
- Finding ways to be more attractive to students physically, academically, and socially; responding to student demand for leading edge, responsive, adaptive physical spaces and technology
  - Growing focus on the special needs of commuter and transfer students
  - Urbanization of campuses and downtown campuses offers more support services to increasing numbers of non-traditional students
  - Insuring that campus and institutional planning fosters inclusion for a diverse student base
- Building flexibility in degree requirements, allowing students to earn degrees while attending more than one institution, and often within the same semester period
- New residential living arrangements de-cocoon students and maximize their social/education opportunities
- Increasing discussion about ways to re-enforce the collegial experience for all students; creating some real durability in the experience of the student

### ***Opportunities for Conversation***

- What is the value of higher education if there is no reliability that there will be a job afterwards?
- If we only receive funding for students we graduate, what will this do to remedial education—will public access be in jeopardy?
- How do we accommodate bright, new international students whose language is not yet proficient for English-speaking classrooms?
- Will online courses create a divide between those seeking higher education—between those on a physical campus versus those who attend via a virtual campus?

## 4. Stewardship of Resources

As limited resources become increasingly scrutinized in higher education, the need for innovative and insightful resource prioritization and stewardship has never been more important. Increasingly, departments are receiving the tools to better understand cost drivers and what must happen to make their operations more efficient.

Space prioritization and facility stewardship issues range from repurposing of existing space, to the transformation of libraries from physical to digital collections. New financial realities have created important financial resource and stewardship issues such as increased focus on enrollment management, and managing difficult decisions between investments, ROI, and costs to balance and create sustainable institutional budgets. Collaboration carries over to stewardship as project development risks are shared, and groups are trying to work closer with each other to ensure projects are very successful.

### A. Space

#### Effective Utilization of Space

- Increasing use of room scheduling software creating efficiency in assignment of classrooms to professors, based on their historical enrollments
- Changes in pedagogy have changed how space is being used, yet we still apply outdated metrics for the amount of space a student needs; how do we change that discussion at a higher level (with state and federal agencies) so they realize that we can't replace or add appropriate facilities using the same metrics that we have used in the past; instead of 12 square feet per student, flexible space goes up to 25 and 30 square foot per student
- Increasing research in change management as it relates to space utilization and classroom assignments scheduling
- Institutions researching corporate models for managing space
- Space utilization targets focused on maximizing density of spaces, from classrooms to social spaces to other academic or administrative spaces, ensuring they are being used and not sitting empty; space charging is an incentive to compress
- Increasing involvement and engagement of faculty to help them manage scarce resources to optimize learning; maximizing faculty office space remains an issue
- Classroom flexibility seems to be disappearing—more flexibility within the classroom itself, but no flexibility within the schedule
- New approaches to space and resource utilization as part of the strategic plan, even when these components often only look out 5-10 years
- With the recent focus on creating collaborative learning space, a survey in 2012 showed that independence and study-alone time are the things student want most from their campus



- Continued struggles with room management: governance over space, IT support, classroom scheduling, policies over who has control, what it takes to support good management
- Increased resources needed as space utilization is intensified: generates needs for different configurations and levels of service
- Institutions are considering the economic impact of managing and maintaining very expensive laboratory and performance space, and how they allocate this space in the future or present

## **Transformation/Repurposing of Facilities**

- Building renewal projects are surpassing new construction and are expected to continue to grow due to the fact that 95 percent of the existing building stock is sub-par relative to energy efficiency
- Reuse/repurposing of buildings built in the '60s and '70s; more reallocations of space or re-interpretations of the facility types we are used to seeing
- Looking at infield development to preserve green space, squeezing buildings onto spaces or applications or onto sites that they wouldn't have built on before to preserve some of the better green space they have on campus
- Faster delivery of projects with a greater use of prefabrication
- Strong trend in flexibility in lab design and renovations
  - Incorporation of technology in lab design
  - Challenges of renovating lab buildings from the late 60's
- Combine classroom activity within the lab environment; reflects a broader trend to use even specialized spaces to fulfill more than one educational purpose; the shifting emphasis is/will be on labs or specialized equipment that learners cannot obtain on-line
- Construction of big, single-use buildings is on the wane; now more hybrid and mixed-use facilities
- Campus transformations are incorporating their mission with a focus on teaching and learning in design features for new construction and renewal; institutions are looking to their physical environment to reflect and influence the culture of their organizations
- Traditional, dedicated classrooms are being replaced by active-learning spaces
- Large numbers of new, completely different kinds of resident student housing being developed: living/learning environments and global villages, plus single-family housing for faculty
- Concept for living/learning centers has changed; there are more academic spaces as well as more serendipitous spaces for students

- Solving long-term master plan and campus growth demands through intensified space utilization and furniture changes, rather than new construction

## **Managing Deferred Maintenance**

- Lack of attention to operations planning during capital planning and underfunded operations have led to deferred maintenance issues; reinvestment can offset problems
- Institutions will have to be more creative in prioritizing and funding deferred maintenance
- A growing recognition that investments in deferred maintenance and maintenance can enhance the financial sustainability of the institution has led to the coining of the term “asset reinvestment”; as energy costs rise so will the realization that investing in improving existing building performance can have a significant impact on the bottom line
- Deferred maintenance projects expand to include re-fitting spaces to better serve today's (and tomorrow's) pedagogies and learning styles, rather than just renovating based on the existing layout and use of space
- Traditional critical maintenance projects, which continue to receive routine funding, will increasingly be seen as opportunities for transformation rather than just “fixer uppers”
- Mid-century modernism being thought of as campus heritage
- More consideration being given to decommissioning buildings that may not be functioning; more of a critical look at existing space use, and potentially removing buildings instead of renovating or replacing them

## **Transformation of the Libraries**

- The library is back as the focus on campus; it's a huge evolution
- Library facilities are moving away from the generic learning commons, to better understanding of how our libraries can become the knowledge centers on campus again, and a 24/7 learning environment
- Libraries returning to some aspects discarded 10 years ago: students want the classic reading room and they want the quiet study space; current struggles to ensure that there's enough quiet study space that hasn't been taken over by group study rooms, meeting rooms, open media centers
- Libraries and similar campus buildings are being renovated to achieve long-term master plan goals without physically expanding the facility by better use of space, better furniture, storing fewer volumes, smaller collections
- Traditional library design is gone; new design is much more open, much more user-friendly, much more adaptable to different learning styles; an environment that builds anticipation, is engaging, and facilitates the work of the student

- Library transformation includes increased technology—but technology as an element within it, rather than technology driving it
- New mergers of library and information technology services (some push-back from faculty and others who do not see the library changing from a traditional model)

### **Risk-sharing and Tightening Access to Capital Driving Alternative Project Delivery Approaches**

- Experimentation with alternative and Integrated Project Delivery (IPD) methods continue to emerge as institutions search for ways to streamline the design/construction process and improve results; traditional design and construction phases are morphing to reflect changing delivery methods
- Out-sourcing: smaller institutions continue to turn to third parties to manage facilities operations and construction
- Public Private Partnerships (P3)—involving at-risk developers who lease land from the institution, and operate a for-profit facility (e.g. residence hall, parking garage) for a fixed period of time is not new, but appear to be gaining steam in the US as a means of satisfying facility needs with less out of pocket funding.
  - Campuses beginning to understand their value and benefit in solving facility issues as the high first cost of new facilities continues to stress the borrowing capacity at HE institutions.
- More design-build agreements due to the speed from start to finish and a growing desire to manage risk
- More higher education clients are reverting back to hard bid project delivery in lieu of design-build (DB) or Integrated Project Delivery (IPD), in hope of minimizing fees and soft costs directing more project dollars to bricks and mortar. However, many higher education clients recognize the hidden costs associated with the contentious relationships between owner/architect/builder that hard bid contracts can foster
- Various forms of design-build: architects, engineers and contractors working together under a single contract to the owner
- Although three-party contracts are currently rare in the construction industry a growing recognition of the value of team collaboration between architect/client/contractor is driving team members to explore ways to share the risks and rewards of the construction process encouraging continued development of the three-party document
- Expectations for design have grown and competition among design firms intensified; ability to use early design concepts for fund-raising and the opportunity to engage donors in the design process have contributed to this
- Business models for architecture firms are changing as owners search for alternative ways to fund or advance projects requiring design consultants to be nimble and adaptable with their practices

- Master planning is in a rut, creating an opportunity to move to a new paradigm; moving from the very broad and long term (20+years) to becoming much more specific and near sighted (5-10 years); almost a cross between the building design and campus planning
- Technology is impacting how the design profession practices and what clients expect; clients want to not only see physical models of buildings but to be able to walk through their building virtually; design-build competitions and fund raising demands increase the need to delineate designs earlier in the process using models, walk-throughs, BIM models and physical models
- Business as usual for architects (selling buildings, design services, master plans) is suffering in the new economy and the profession needs to redefine the value they offer to the higher education community
- Building Information Modeling (BIM) is increasingly required by higher education clients although the “after market” value of the models (linking design, construction and facilities management through the BIM database) has yet to be fully understood or realized
- BIM is expected to improve coordination, reducing changes during construction, which can negatively impact budget and schedule. However, the presence of this new technology is driving a trend towards building with tighter tolerances increasing the risk of error
- “Lean” processes are being adopted by institutions and consultants to minimize redundancy and reduce cost of services and construction with a growing emphasis on delivering value not merely low cost
  - These techniques are delivering dramatic positive results from deferred/PM, to small project management

## **B. Managing in Our New Financial Realities**

### **Focus on Enrollment Management**

- Major fluctuations in the student body from year to year for various reasons: (poor performance, financing concerns, price concerns, issues recruiting, and 'poaching' by other institutions) have added difficulty in maintaining a predictable, stable student body
- Without knowing the student population, or at least having a good predictive model, it becomes difficult to place resources where they can best utilized
- Will real enrollments shrink while online enrollments grow; how will our current system be changed?
- Campuses increasing their international and out-of-state student enrollment for the higher tuition dollars in this finally strapped time
- Caution about federal government legislation that impacts how costs and tuition are managed

- Possible financial aid changes on enrollment, if federal financing-aid funding is part of the federal deficit reduction

## Continuing Drop in Funding Levels/Impact on Operating Budgets

- Recognition of the need to do things differently in an era of limited resources; there is a finite amount of resources to go around; we must balance ambitions and expectations with strong planning
  - Planners need to develop another level of sophistication around planning: integrating multiple kinds of planning, and being wise stewards of our resources
- Formula funding based on outcomes is an emerging trend; past formulas have focused on input, now funding come for student success; requires a new mindset of some in in many departments across the campus
- “Bending the curve of the cost” disease, (i.e., reaching the limits of pricing/aid/discount strategies to increase net tuition revenue and finally having to grapple with cost reduction in academic programs and administrative overhead)
- Colleges and universities analyzing the profitability or financial contribution of each academic department/program; working with departments to map out strategies to get them to contribute more to the bottom line. Departments have to understand the cost drivers and what must happen to make them efficient
- Creative approaches to solving the financing of a student's education: alternative sources, life-long commitments, corporate/education partnerships, etc.
- Balancing acts between budget restrictions and investments
- Increasing investments toward resource optimization
- In disaster zones (like Hurricane Sandy) the state and county are already overburdened with the costs of disaster relief—a difficult situation for higher education is made worse for institutions in those counties
- Project and service management viewed as organizational disciplines
- For management and cost considerations, campuses are “re-centralizing” or consolidating, as opposed to the de-centralization of the past
- Centralization of business activities, e.g., purchasing activity for several colleges as opposed to each college signing contracts for purchase or procurement of goods or services
- Single purpose buildings have become unaffordable for many institutions; disciplines merge into multi-disciplinary buildings (putting more than one department and/or discipline within a single building) for better facilities and integration across disciplines
- Employing efficiencies by outsourcing some operations

## Focus on New Revenue Sources

- Without funding for traditional academic spaces, institutions are adding those spaces to facilities that are funded by auxiliaries (anything that has a revenue stream: student housing, student centers, parking garages) e.g., there are parking garages with classrooms in them now; called “mixed use projects,” but the parking revenue has to pay for the classrooms
- Slowing in mission creep—although there continues to be an increase in the number of community colleges offering baccalaureate programs, the increase is slowing
- Surplus campus land is being used to generate revenue
- Research funding and space: takes more funding now to support the same square footage of space that faculty occupy; also funding is proportionately less; may take more applications to get funding
- If we don’t manage resources effectively, the impact could effect the success of the capital campaign we are contemplating
- Looking for prospective donors
  - Institutions don’t take spending their money lightly and are even waiting for pretty large donations to even renovate these days
  - What are the connections between alumni support for the campus and building preservation; how strong can their interests and funding support be to buildings that may be torn down?

## Opportunities for Conversation

- In respect to integrated planning structure, discuss other aspects that are becoming much more relevant to planning, including resource planning
- Address basic space management for first year planners
- How do you design spaces that really enhance medical education, allied health education?
- Expand architectural training (too focused on the buildings and to a lesser extent on the spaces in between); build more understanding of the context around higher education
- Talk more about evidence-based design employed in physical building projects
- Revisit past plans from recipients of Excellence in Planning Awards or results of previous design work—what happened? How did it turn out? Honest appraisal of the lessons learned from planning that was implemented over time; were the expected results achieved, and why or why not?
- Provide a retrospective of major plans and their outcome after many years. It is one thing to develop a plan but how do you go about determining whether that plan has been successful; what does the outcome look like? How do you assess the effectiveness of your plan? Lots to learn in the post mortem

- How are people approaching building when there's no money coming? How do you secure alternate financing? Data/information on project funding/financing, etc.
- As budgets continue to tighten, how does an institution make funding cuts or reallocate resources? Do less with less?
- How do you address diversity in the master planning process?
- Discuss process improvement techniques that speak to the whole issue of everyone having to do more with less. How do they 'mine' their own business practices for the resources they need to really move ahead?
- Follow-up session addressing issues from SCUP's Campus Heritage Symposium
- How can you give deans and others a sense of ownership when they share a multi-disciplinary building? How might the opportunities this provides for collaboration be an advantage and not seen as a disadvantage?
- Discuss projects with private investment for public institutions
- Sessions on the economy and financial environment and how to work within it; how does it impact the employment outlook for students?
- Dramatic changes to campus master planning, campus buildings, and changing curriculum change the methodology within the classroom—are some of those experiments working better than others? Where should we be going in our design work? What metrics are most effective?
- Explore issues in a more foundational way (e.g., the culture around space and how it impacts students' decisions)
- For libraries, offer material addressing academic vs. research library needs, especially regarding learning environments, infrastructure and amenities
- Examples of good retrofitting efforts on existing buildings
- More discussions regarding development of research parks and the perks needed to attract and retain top researchers

## 5. Engagement and Inclusiveness in the Planning Process

The theme of partnering and collaboration is echoed in a larger context this year. The proposals confirmed what the academy members were seeing in their own work: powerful development of true partnerships—programmatically, financially, and in the curriculum. The level of collaboration to find solutions and to share best practices is higher than ever, and cuts across institutions and programs to include both planners and stakeholders. There is a broad recognition of the need to do things differently in an era of limited resources and economic downturn.

### Collaboration & Partnership Proliferations

- Colleges/universities are becoming agents for collaboration, both locally within their cities and also regionally; state institutions and community colleges have a huge role in this
- Observing better end results by involving all of the stakeholders in the decision making process—top to bottom. Everyone likes the recognition and feeling that they are/were an integral part of the success, no matter how big or small
- Exploring and engaging in online learning partnerships with external entities, perhaps supported by venture capitalists, like Coursera
- Broader integration of shared governance, incorporating faculty with the understanding that integrated planning is many things, and doesn't necessarily always have to be comprehensive
- Much more student engagement in selection of architects for student facilities on campuses, including YouTube videos of architect presentations that allow students to vote
- More direct communications between the institution and industries and community groups
- In academics and programming, an increase in interdisciplinary education more commonly referred to as interprofessional education creating exciting new partnerships (e.g., fire-science training in conjunction with the fire station on campus)
- Town-gown relationships has economic and social impact; striving for win-win approach between college and community, however there is continuing need for more community involvement in planning as it relates to noise, traffic, construction and employment
- “Community benefit agreements” growing as a formal negotiation between a college/university and the community on specific projects—they come to agreement on a list of benefits that could specify minority employment, traffic signals, etc.
- More collaboration between the system schools; they share similar issues and seek to find solutions within their own schools



- New term: democratized integrated planning—a process that will enable participants to see firsthand how innovated solutions can come from diverse stakeholders
- Public, private partnerships are creating residence hall/mixed use developments—figuring out ways to use other people’s money to create capital projects
- Growing number of partnerships either between institutions, or between institutions and municipalities or other organizations; growth of international collaborations
- Increase in collaborative physical planning to help a whole group in the room feel ownership, and to follow through in a responsible way
- Heavy focus on relationships that address financial needs, especially for public universities

### **Community Colleges—Partnerships Around Degree Programs**

- Greater collaboration between four-year/two-year colleges; four-year schools have been putting offices in community colleges and building transfer agreements
- Focus on precollege: working more closely with local K-12 school districts in partnering programs to improve student readiness; if they have to focus on student completion, then students need to be ready for them when they arrive
- An increasing workforce focus in community colleges, working closely with local companies for program development, more short-term and certificate programs, and stackable credentials that someone can build toward a degree

### ***Opportunities for Conversation***

- More observation and analysis that extends beyond a single example to a more even-handed look at several institutions with good examples of community development or institutional partnering, coordinated with neighborhood or regional partnering
- What are the key principles that make partnerships successful?

## 6. IT and the Classroom

Strains on the current cost model for delivery of higher education has opened up experimentation of other methods that incorporate greater use of technology. A sustainable business model is still in question, but early triumphs and stumbles will help show the way for a successful balance of online and traditional learning.

Technology and its explosion of learning innovations make real and purposeful learning available anytime and anywhere. Learning spaces are being evaluated for how users perceive them and how they impact student academic performance. Experimentation with new instructional models is changing the classroom experience, and professors are moving toward a more collaborative, interactive model—a co-pilot in student learning.

### Technology

- Rapid advancement and use of cloud computing, high-performance computing, mobile computing, collaborative/shared systems, service management, 100gbps networking, increasing use of social media in the workplace, IPTV, and MOOCs—with wide impacts on space, campus design, teaching methodology, student demands, and services
- Institutions analyzing how new technology-enhanced, active-learning studios are being used, how users perceive them, and how they impact student academic performance.
- Exploring the geospatial portal concept, or a one-stop shop for technology use for the campus community
- Emerging conversations about Section 508 Amendment to the Rehabilitation Act of 1973, which specifies making electronic and information technology accessible to people with disabilities; institutions grappling with how far they will go with their level of compliance
- More needs analysis is focused on e-learning and hybrid learning than there is on traditional face-to-face learning
- Increasing emphasis on MOOCs and stackable credentials without a universal understanding of what these are
- Increasing explorations and partnerships with MOOC courses on Coursera, for both domestic markets and for reaching out to a non-traditional markets in Asia; studying the effectiveness of this mode of delivery/pedagogy as well as to understand the incentives for faculty involvement
- Multiple expectations from both faculty and students about the functionality of learning spaces, increasing focus on distance education and hybrid courses, intentional design to improve/increase student engagement with faculty, and peers
- Integrated IT planning—involving campus constituents in IT strategic plans and service delivery evaluation

- Jury's still out on the impact of social media as a panacea for reaching people from the interest and intensity of a couple of years ago; people adding new filters for their communication; anticipate new modes for communication
- Individuals experiencing electronic information overload
- Developing new research on network theory as it applies to how complex adaptive network systems work. Cities are an outcome of these networks and universities are a very important part of the network in terms of creative and innovative output

## **Pedagogy & Teaching Models**

- Everything is questioned as educational delivery adapts into a highly technical world: role of the teacher, classrooms and campus itself in the learning process, length of programs, 'subjects' as the basic unit of learning, modules, pace, etc.
- Moving away from faculty-prepared lectures
  - Faculty/administrators acknowledging the need for new teaching and learning models; increasing emphasis on active learning, blended learning, online learning, MOOCs, and 'flipped' learning—where lecture content is delivered on-line at the pace students want with more use of 'lab' time for group instruction
- More online degrees and more online courses in general
  - Growing focus on modules available on line with sections led by adjuncts or tutors using the exact same materials
- Faculty need to stay on top of latest trends while still making sure that the fundamental truths behind a discipline are the same; challenges remain in changing their teaching methods to new student methods of learning

## **Impact on the Learning Space**

- Mobile technology is freeing up how space is used, making it less expensive and less encumbered; technology has been a blessing to facility design
- Teaching is untethered, all you need now is a really good room
- Today's students are digital natives who grew up with technology and are questioning the role of the physical campus
- Increasing assessment on the impact of space to the enrichment of the undergraduate experience; building understanding of the pedagogy of learning spaces and how learning space contributes to student learning
- Campus design has not adjusted quickly to these pedagogical aspirations, but the growth of distance education/technology use has not substantially impacted campus space needs so far
- Increasing discussion on how the use of smart devices impacts classrooms, placemaking, institutional branding; more emphasis on connecting campus design to the needs of a digital native student

- Innovative, integrated ways and processes to engage stakeholders in addressing new and emerging typologies and technologies
- With the push for more collaborative space, it's still hard to try and change the hierarchical models of learning spaces
- Significant interest about living/learning environments: combines master planning, strategic planning at the university level, and programming; robust processes are being dedicated to it

### *Opportunities for Conversation*

- How do hybrid and e-learning courses change how we need to build or plan? Will we need fewer classrooms; will there be fewer students on campus?
- What will the classroom of the future look like with technology? How does a MOOC environment and physical campus work together?
- How do we continue to engage students with technology on campus in the classroom of the future?
- With so many different types of learning going on, is there a risk that facilities become purpose built again, could there be a problem of obsolescence as different styles of learning develop?
- What if the physical campus does not play a predominant role in student engagement and learning in the age of MOOCs?
- How do campuses and their environments influence student outcomes?
- How do you manage the space needs of senior faculty who don't get as much funding?
- Are we spending too much time talking about the next technology facilitated classroom as opposed to going back and assessing which of those has worked really well? Not learning from what we've done, as opposed to simply innovating all the time?
- What is the impact of telecommuting administrators on space needs?
- How is the business model of a MOOC defined?
- How can we enhance the non-classroom experience? What studies can inform this?
- What are the social implications to students who learn in a digital environment? Is there an impact on character building or formative development? How does their education change?
- Consider collaborative conference with EDUCAUSE to bring a stronger focus on technology, alert us to new developments, and help traditional planners think outside the box

## 7. Environmental Sustainability

Conversations about environmental sustainability are deeper and focused on a higher level of strategies. Institutions are genuinely engaged and expect performance-based systems with payback. While clearly in early stages, we are finally beginning to see some movement toward reporting on the ultimate outcomes of net zero and sustainable buildings, not just the planning of them. Campus awareness and environmentally friendly policies have prompted new levels of energy efficiency and carbon reduction strategies. Students now largely take sustainability for granted, and often lead an institution's efforts. Institutions are starting to work with local and regional agencies to coordinate transportation and other consumptive practices.

### **Sustainability Prominent, Becoming Ubiquitous**

- Maturing of the sustainability office; becoming more mainstream, less and less specialized so it becomes an integral part of the campus planning process
- Responsiveness to regional constituents, especially in community colleges, where it's an important, mission-based, activity. However, many times institutions rush to 'build it' and 'they do not come.' Critical discussion of determining factors in academic planning is important
- LEED gold is where LEED certified was a couple years ago. Now it's LEED platinum, Living Building Challenge, net zero. Everyone expects platinum these days
- Continued design to the LEED standards, building green, but many do not pursue LEED status due to additional cost or other reason
- Institutions also seek recognition for sustainability initiatives through the AASHE "Stars" program; another avenue for measuring success of sustainability initiatives
- Driving behavioral change
  - Ongoing building performance data is educating users, encouraging behavioral change and raising social, environmental and economic awareness with respect to sustainable design on campus.
  - Local zoning changes now discourage building parking spaces, with the idea that minimal parking encourages deeper use of alternative means of transportation
- Conversion of structures to green spaces, e.g., aging parking lot into green space for urban farming
- Sustainability extended beyond building to lighting, water use conservation, etc.

### **Net Zero—The New LEED?**

- Campuses are more seriously looking at reducing their energy footprints, setting ambitious goals—for example, West Point wants to become a net zero by 2020
- Environmental/sustainability aspects are changing; more focus on zero net energy; moving to a higher performance level

## Emphasis on Building Performance

- More on post-occupancy type of evaluations; more actual data and metrics related to building performance: “here is what the building is telling us”
- Building emphasis extends beyond design aspirations to how the building is performing; did what we aspire to achieve from an energy savings or sustainability standpoint prove out once the building was in operation for a year?
- New term: backcasting—a planning method for sustainability with performance goals, with origins in The Natural Step (a non-profit sustainability organization founded in Sweden)
- LEED will be eclipsed by stretch codes that will push the built environment to new heights of energy efficiency

## Opportunities for Conversation

- Discuss the common interests around the environment that join the campus and the community
- What is the status of the American College & University Presidents’ Climate Commitment (ACUPCC)?
- Address the narrative, critical thought, and systems that forward the sustainability movement
- When was *not building* the best solution for a college or university?
- Report results from previous facility design efforts that were net zero buildings, sustainable design efforts, new technology, etc.; were the desired and projected results achieved?



## To Create A Dialog

It is hoped that this document adds to the 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.

### Comments from academy members during the production of this report:

*A president's leadership challenge from a public institution: "apply a filter on all of our leads and risks and planning decisions. Ask yourself—what's the added value to the student and learning as we make our hard choices?"*

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"From a for-profit perspective, every element is examined and that's okay; tuition is competitive and students are performing outstandingly. But that forces us to be very cognizant of everything that we do and all the messages that we transmit, and every element of the process of educating students. A lot of institutions are going to have to do the same things, going forward."

"Our provincial government actually put out a thought-paper basically telling all the universities and colleges in Ontario to submit a "strategic mandate agreement" of where they're going in the future, and they specifically said you need to stop thinking about cutting costs. Change your way of thinking to be innovative in your solutions for higher education going forward. Connect the digital technology piece. Think about accessibility and affordability, but don't do it in the way that you've always done it and thought about it in the past."

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"With big changes in an expanding and prosperous world, you have to think differently and ask yourself, it's not about how can I do what I've been doing better, it's recognizing that I may have a completely new set of partners—so who are those partners, and how can I grow in my usefulness to others? We give up some control as we all roll in the same direction and hope that others will use their strengths to help get us there."

# Society for College and University Planning SCUP Academy Council: Report on Trends in Higher Education Planning 2013

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## SCUP Mission

The Society for College and University Planning is a community that provides its members with the knowledge and resources to establish and achieve institutional planning goals within the context of best practices and emerging trends.