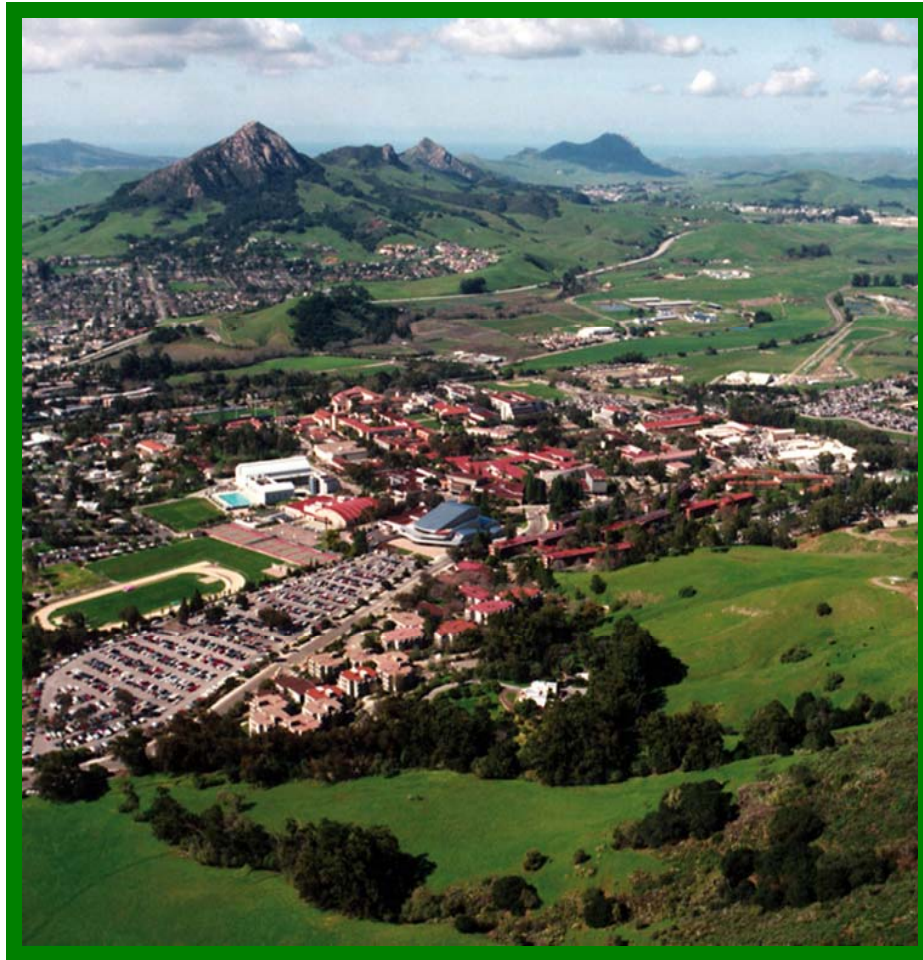


Managing User Expectations



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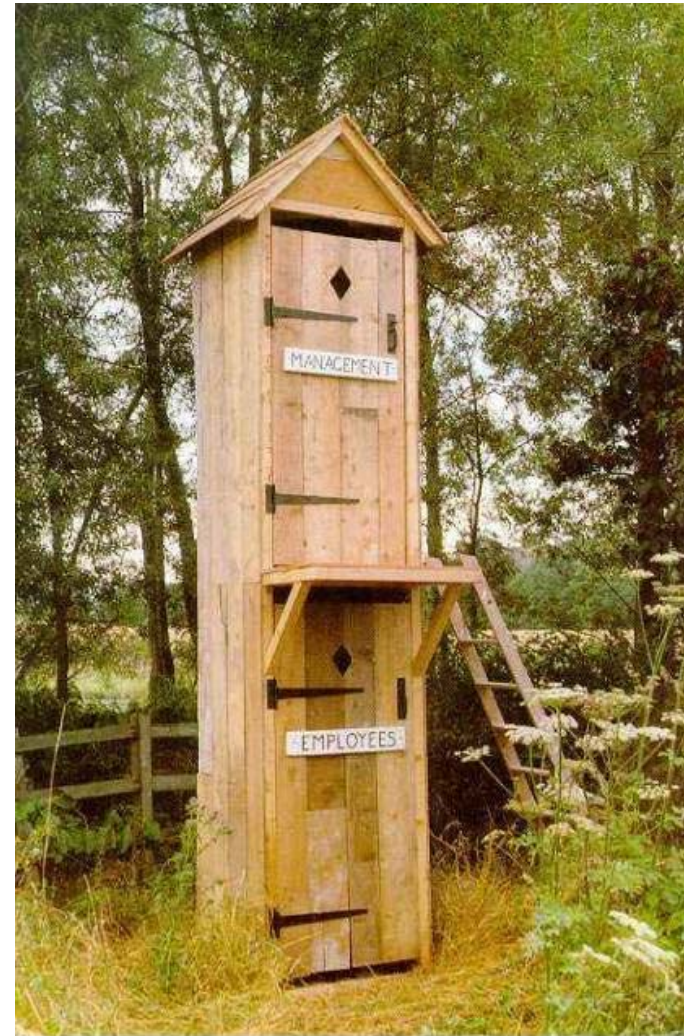
California Polytechnic State University, San Luis Obispo

Managing User Expectations

- I. Introduction
- II. Relational Management
- III. Managing Expectations
- IV. “Smoke & Mirrors”
- V. 24/7 Management
- VI. Communication Pipeline

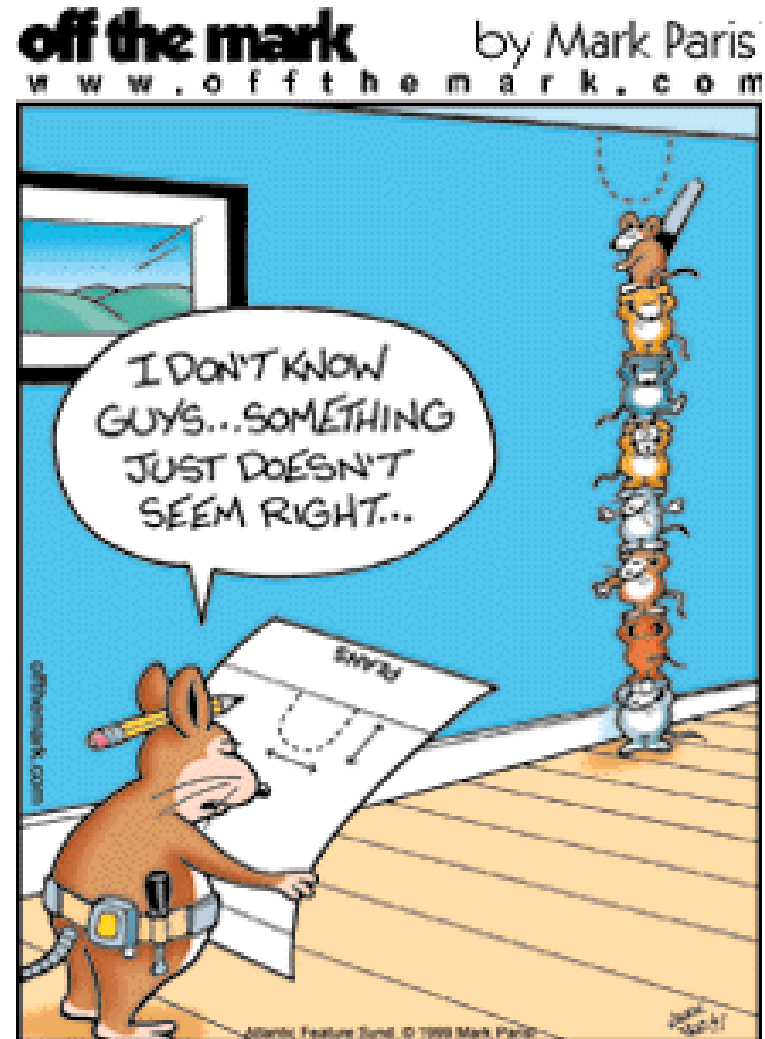
Introduction

So you thought your job is about putting up a building?



Relational Management

- In today's world, the product is about, for, and done with people
- Building relationships
- Building trust
- Start with guiding principles
 - Integrity
 - Commitment
 - Empowerment
 - Creativity
 - Collaboration
 - Equity



Managing Expectations

- The biggest obstacle to overcome on any project is meeting expectations
- Any project is 20% process and 80% relationship
- Programming – where expectations are created and set in concrete
- Design phase – avoiding the major changes to the program during design



It Can't be Done with "Smoke & Mirrors"

- Establishing a campus process & policies for decision-making
- Understanding the process
- Training your staff



Cal Poly

Major Capital Outlay Projects

Campus Implementation Process

Schematic Diagram of Present Practice

				Responsibilities			
	Steps		Items Covered	Planning	Review	Consultation	Endorsement and Approval
Policy Direction	I.	Project Concept and Scope	Consistency with the mission of the university, timeliness of the project, strategic planning, risk assessment.	Project Sponsor (Vice President, Dean or Head of Unit), Coordinating Team (established for the project)	Provost's Office, Administration and Finance Division	Ad hoc (varies with type of project)	President, Executive Staff, CSU Board of Trustees
	II.	Master Plan Consistency	Compliance with the Campus Master Plan, its Elements and Area Plans for sections of the campus.	Facilities Planning and Capital Projects (FPCP), Executive Vice Provost/CPO, Coordinating Team, consultants as needed	Master Plan Committee, Project Sponsor	*	President, Executive Staff, Campus Planning Committee [all, if project and/or location not consistent with the Campus Master Plan and its Elements]
	IIIa.	Program, Business Plan and Preliminary Site Plan (general direction)	Building program, concept plan, financial feasibility, campus operational impacts analysis, including information technology; pre-construction budget and funding.	Coordinating Team, FPCP, Executive Vice Provost/CPO, Other committees and consultants as needed	Master Plan Committee, Project Sponsor, auxiliaries and support services (as appropriate to the project)	User Group (faculty, staff, students in programs served by the project); other affected groups or stakeholders (e.g., off-campus neighbors)	President, Executive Staff, Provost, VP Admin and Finance, Project Sponsor, CSU Board of Trustees [the latter, if public/private]
Design and Construction	IIIb.	Program, Business Plan and Preliminary Site Plan (detailed analysis and planning)	Site analysis, building program, concept plan, financial feasibility, campus operational impacts analysis.	FPCP, consultants as needed	Coordinating Team, Executive Vice Provost/CPO, Master Plan Committee, auxiliaries and support services (as appropriate to the project)	User Group (faculty, staff, students in programs served by the project)	President, Campus Planning Committee
	IV.	Schematic Design and Environmental Review	Schematic design, CEQA process, Board of Trustees approval process	FPCP, consultants as needed	Coordinating Team, Executive Vice Provost/CPO, Master Plan Committee, Landscape Advisory Committee, Biological Sciences Advisory Committee, auxiliaries and support services (as appropriate to the project)	User Group (faculty, staff, students in programs served by the project); other affected groups or stakeholders (e.g., off-campus neighbors); public comment on environmental documents	President, Campus Planning Committee, CSU Board of Trustees
	V.	Working Drawings and Construction Documents	Development of technical drawings and specifications for construction	FPCP, consultants as needed	Coordinating Team, auxiliaries and support services (as appropriate to the project)		Director, FPCP/Campus Deputy Building Official
	VI.	Construction	Site and building construction, approval of construction budget and funding	FPCP, consultants as needed	Coordinating Team, auxiliaries and support services (as appropriate to the project)		Director, FPCP/Campus Deputy Building Official

NOTES: Shaded steps involve conceptual development and policy review to establish project direction.

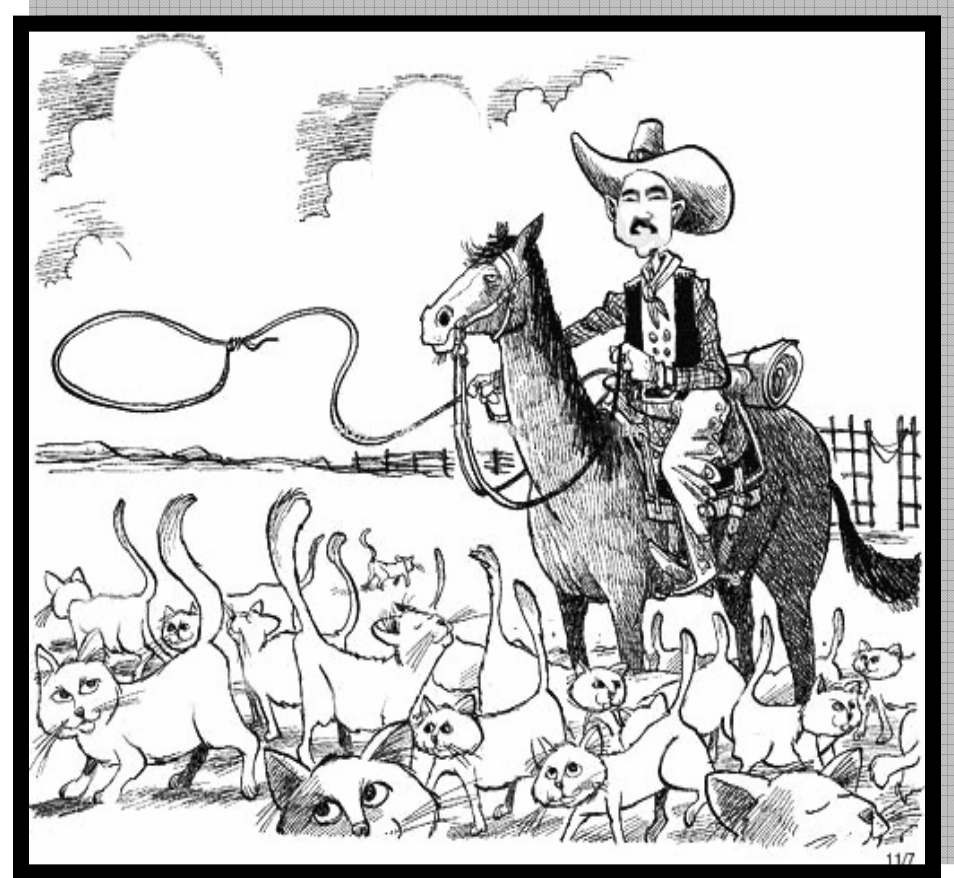
Steps generally progress in the order shown, but overlap in time.

Depth of involvement of the entities listed above may vary depending on the size and complexity of the project.

* Except for Master Plan development and major projects, such as Student Housing North, which have extensive involvement processes, consultation with faculty and students at the policy level has been accomplished primarily through their representation on the Campus Planning Committee, the Landscape Advisory Committee, Biological Sciences Advisory Committee and the Academic Senate Budget and Long-Range Planning Committee.

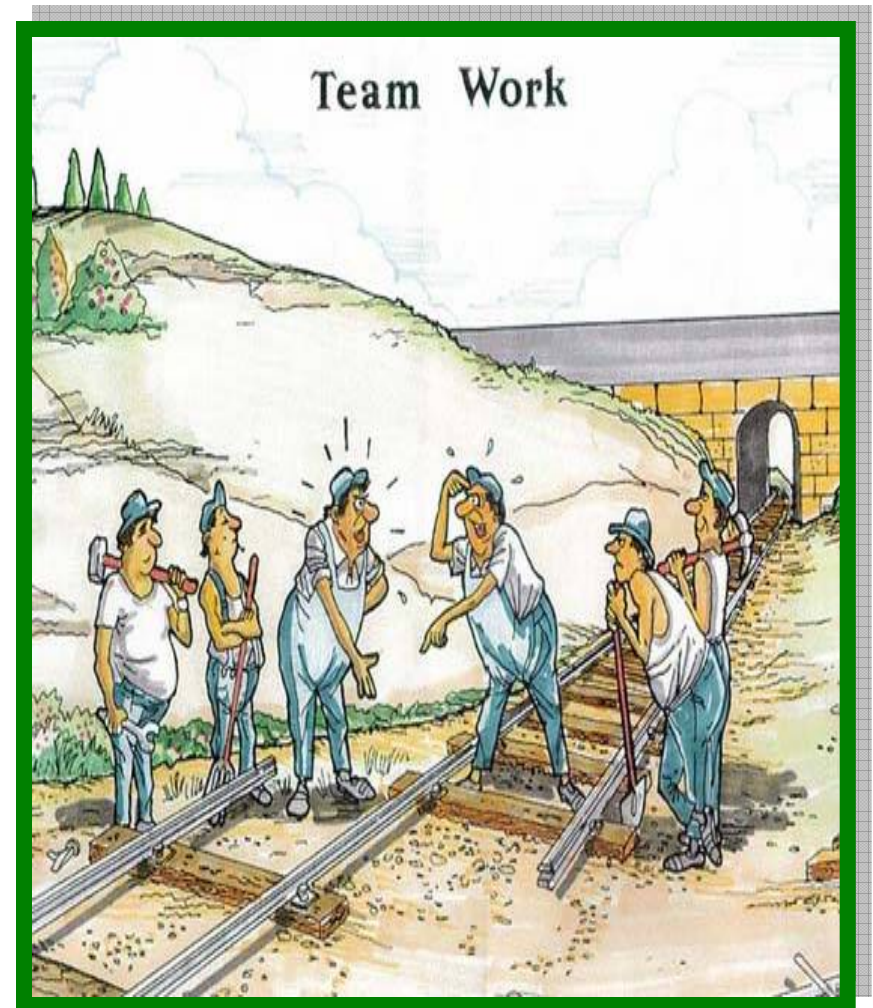
24/7 Management

- Commitment to the project
- Patience with people
- Creativity –
thinking outside the box

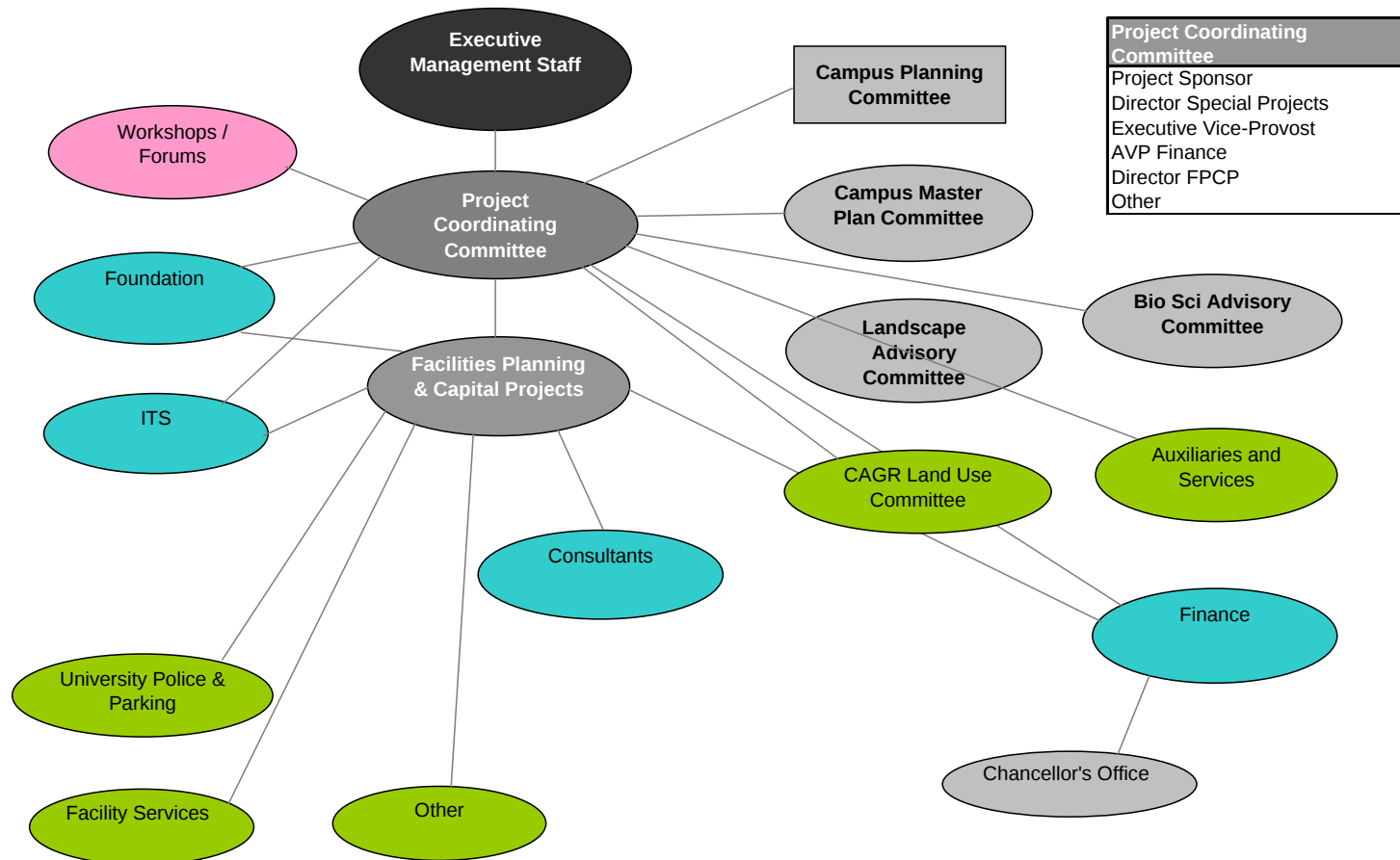


The Communication Pipeline is Always Open

- It's the key to relationship building
- The art of communicating – staying on the “high road”
- Listening for opportunities
- Communicating when there is nothing to say
- The Team Approach – A Cal Poly Model



Cal Poly Tech Park Project Organization Plan

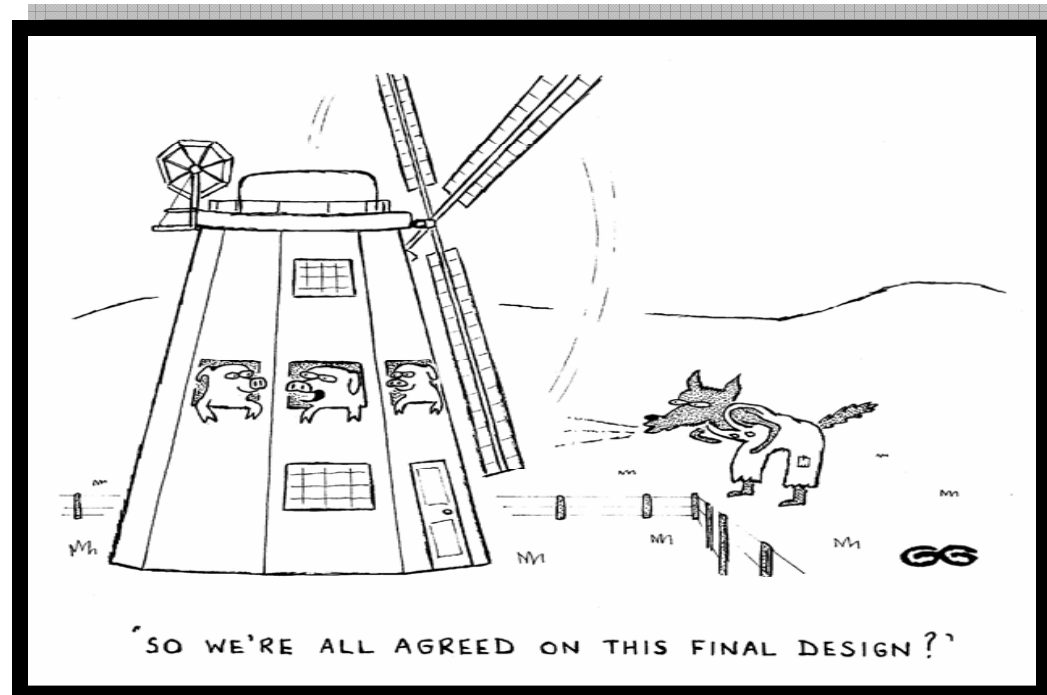




Facilities Planning & Capital Projects

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Focus Group Discussion



1. What are ways we can help to establish the correct expectations and maintain them?
2. What are ways you can integrate guiding principles into the day-to-day of managing projects?
3. What are ways you can improve communication and attitudes between users, consultants. and contractors?