



A comprehensive master plan forms the basis of short and long term facility planning, and assists facility managers and building owners with capital planning decisions.

HOW OFCC CAN ASSIST YOU

OFCC can assist clients in evaluating current needs and goals and determining the type of planning approach for your specific project.

ELEMENTS OF A MASTER PLAN

A comprehensive planning effort will not only evaluate facilities to determine short and long-term needs, but develop goals for the agency's and institution's operations and programmatic mission.

WHY DEVELOP A MASTER/ CAPITAL PLAN?

A comprehensive master plan forms the basis of short and long term facility planning, and assists facility managers and building owners with capital planning decisions. The action items and goals developed through master planning are used to support strategic and long range plans, develop capital and operational priorities to address deficiencies, and can be a catalyst to gain support for capital funding and participation in program development.

A master plan process has been an integral part of the OFCC's Classroom Facilities Assistance Program since the program's inception and is used by K-12 school districts and the OFCC to develop the facilities program for funding approval and development. State agencies and state supported institutions of higher education that submit capital appropriation requests for the State of Ohio's biennial capital budget are required to submit a 6-year capital improvement plan with their request.

HOW TO DETERMINE IF A MASTER PLAN IS NEEDED

While there are statutory and provisional requirements for planning related to capital requests and appropriations, the need for and extent of planning should be determined in advance of any specific request for capital funds. Consider the following on whether a master or capital plan should be completed for a facility or organization:

- Are repairs and replacements to existing facilities increasing in scope and cost beyond historic norms?
- Are operational and program needs requiring modifications to facilities beyond what had been requested under the last capital plan?
- Has a master plan been completed for the facility / agency over 10 years ago, or has it been updated over 5 years ago?
- Has a facilities assessment (review of physical conditions) been completed over 7 years ago?

Other conditions, such as changes to program, staff, and legislation, may trigger the need to consider a master plan of existing facilities to determine a course of action for future needs.

ELEMENTS OF A MASTER PLAN

Master planning is a combination of several processes and activities working together. The scope and extent of master planning varies between agencies and institutions, and even within institutions. A comprehensive planning effort will not only evaluate facilities to determine short and long-term needs, but develop goals for the agency's and institution's operations and programmatic mission. The focus of planning can include:

- Strategic goals
- Current and future programmatic goals
- Operational needs and changes
- Demographic change and predictions
- Staffing changes and needs
- Legislative directives and codes

The planning process can include the following elements:

- Market and demographic studies
- Facilities assessments
- Visioning and goal setting sessions
- Programming studies
- Prioritization reports
- Facilities database

THE MASTER PLAN PROCESS

While the level of planning can vary, consider the following steps for a successful planning process:

- Establish a decision structure and level of participation to guide the planning process, review and evaluate the data, and prioritize the recommendations into action plans.
- Participate in visioning sessions to establish goals and life span for the master plan, process for plan administration, and timeline for completion.
- Determine levels and types of resources necessary for plan completion. Procure consultants and advisors through internal process or through OFCC Consultant List.

- Complete assessments and data collection of facility conditions, operations, organization, and other relevant data to support the plan.
- Review assessment and data, develop recommendations and prioritize into an action plan.
- Finalize action plan and prepare final master plan.
- Develop action plans into capital plan recommendations.

WHAT DOES OFCC DO?

- Assists clients in evaluating current needs and goals and determining the type of planning approach.
- Establishes schedules and budgets to complete the planning process, to include consultant support if needed and other outside resources.
- Facilitates fact-finding and goal-setting meetings to develop the structure and outcome of the planning process.
- Develops procurement documents including scope of work for consultant selection.
- Manages consultants and resources through the planning and assessment process, ensuring consistency and compliance with expected standards and level of care.
- Assists clients in prioritizing the planning study recommendations and developing action plans for the "next steps".
- Assists clients in developing capital request submissions, including narratives, budget reviews and project development.

ABOUT OFCC

OFCC is responsible for guiding capital projects for state agencies, state-supported universities and community colleges, including Ohio's comprehensive public K-12 school construction and renovation program. The Commission also manages grant programs for cultural facilities, school security, community school classroom facilities, and lead plumbing fixture replacement in schools.