

PLANNING AND MANAGEMENT OF BUILDINGS COURSE CURRICULUM

DAY ONE

Module 1: Building condition assessment

Contact Hours: 45 minutes (10:00-10:45)

Learning Objectives

- Participants will know how to assess the current condition of their building.

Agenda

10:00 Introductions

10:15 Building assessment

- Condition assessment
- Development of maintenance schedule

Group Exercise:

- Develop list of tasks in facility assessment

Module 2: Maintenance /operation practices and budgeting for maintenance

Contact Hours: 1 hour and 15 minutes (10:45-noon, one 15-minute break)

Learning Objectives

- Participants will know how to develop a list of building maintenance and operation practices.
- Participants will know how to develop a schedule for ongoing maintenance.
- Participants will examine different models for budgeting for building maintenance.
- Participants will know how to monitor performance of maintenance personnel.

Agenda

10:45 Tasks in building maintenance

- Develop list of required tasks
- Schedule frequency of tasks
- Performance evaluation

11:15 Break

11:30 Budget models for maintenance

12:00 Lunch

Group Exercise:

- Develop a list of maintenance tasks and develop frequency schedule
- Discuss participants experience with different maintenance budgeting models

Module 3: Capital and facility development plans

Contact Hours: 2 hours (1:00-3:00, 1 break of 15 minutes)

Learning Objectives:

- Participants will know how to assess their facility needs in supporting the organization's goals and objectives.
- Participants will know how to link the library's building improvement project to the library's strategic planning priorities.
- Participants will know how to conduct a gap analysis to determine facility needs.
- Participants will know how to present planning documents to funding authorities.

Agenda:

- 1:00 Aligning facility assessment with library priorities and differentiating between short term and long term goals.
- 1:15 Defining objectives as facility needs
 - Number of People Served
 - Hours of service
- 1:30 Planning steps: Who will be involved, Gap analysis
- 2:00 Break
- 2:15 RFP's, evaluating bids and funding options
 - Local Funds Appropriation
 - Bonds
 - Grants
 - Fund-Raising

Case Study: Tree County Public Library Facility Planning Process

Group Activities: Evaluate library branch floorplan for service priorities
Design planning team

Module 4: Communicating with stakeholders about facilities projects

Contact Hours: one hour and thirty (3:30-5:00)

Learning Objectives:

- Participants will know how to gather opinions and information for project
- Participants will know how to develop a communications plan to keep stakeholders informed throughout a building project

- 3:30 Developing a communications plan
 - Gathering information and opinions
 - Defining plans and gaining approvals
 - Internal communications
 - Communicating with users
- 4:45 General questions/Review today's topics and tell them what we'll be covering tomorrow
- 5:00 Adjourn

Case Study: Tree County Public Library Facility Planning Process

Group Activities:

- Develop communications plan: who needs communication and how to deliver it

DAY TWO

Module 5: Building programs, building committees and hiring professionals

Contact Hours: 3 hours and 30 minutes (8:30-12:00; 1 15-minutes break)

Learning Objectives:

- Participants will be able to list key components in a building program.
- Participants will know how to conduct a formal facility needs assessment.
- Participants will know how to establish and manage a planning committee.
- Participants will know the procedures in employing architectural, engineering and consultant assistance in assessing or improving their building.
- Participants will know how to list technology planning needs and associated building requirements.

Agenda:

- 8:30 Building Programs
 - Purpose of a building program
 - Elements of a building program
 - Projecting your space needs from strategic planning documents (review)

- 9:30 Technology Planning
 - Assembling the technology planning team

- 10:00 Library Building Committees
 - Who should participate
 - Addressing and negotiating conflict
 - Creative problem solving

- 10:30 Break

- 10:45 Using Building Professionals
 - RFP design and distribution
 - Architect selection
 - Contract documents
 - Building specifications
 - Schematic designs, floorplans, elevations and sections

- 11:30 Site selection
 - Access issues
 - Local priorities

Case Study: Tree County Public Library Facility Planning Process

Group Activities:

- Service Contingencies Bubble Diagram

CPLA

- Turn objectives from Tree County Plan to number of workstations required and chart space needs
- Determine professional assistance requirements for case study

12:00 Lunch

Module 6: Managing the construction process for new and remodeled buildings and life and safety issues in building planning

Contact Hours: 1 hour and thirty minutes (1:00-2:30, 1 15 minute break)

Learning Objectives

- Participants will know how the library team participates in design development
- Participants will know how to integrate safety needs into their plans
- Participants will be familiar with how to work with construction contractors and project oversight.
- Participants will know how to create a preliminary plan for their library's project.

Agenda:

- 1:00 Design development
- Elements to review
 - the library team's role
 - life safety needs
 - HVAC, acoustics and electrical needs
 - Remain onsite during construction or operate temporary quarters
- 1:30 Construction meetings, Communications planning
- 1:45 Action Plan template
- Where is your library in cycle of development?
 - What are your 1 month, 3 month and 6 month goals?
 - Whose involvement is necessary?
 - What information is necessary?
- 2:15 Break

Case Study: Tree County Public Library Facility Planning Process

Group Exercise: Design a communications plan for the building project

Introduce individual homework exercise: Develop an action plan for your library's facility project

Module 7: Opening and post occupancy evaluation

Contact Hours: 2 hours (2:30-4:30)

Learning Objectives

- Participants will be familiar with different models to manage the moving process.
- Participants will know the elements of opening a new service or building

- Participants will know how to conduct a post occupancy evaluation

Agenda:

- 2:30 Occupancy permits and moving in
- 3:00 Planning the opening
 - Who speaks?
 - Who's invited?
- 3:20 Post occupancy evaluation
- 4:15 Questions, Review and Evaluation
- 4:30 Adjourn