



POLICY STATEMENT 23 CAMPUS FACILITY AND SITE PLANNING

POLICY DIGEST

Monitoring Unit: Office of Facility & Property Oversight
Initially Issued: December 1, 1975
Last Revised: July 3, 2019

I. PURPOSE

This policy provides for:

- A. an integrated approach through thoughtful planning and design toward creating and maintaining a physical environment throughout the extent of the campus boundaries consistent with LSU's status as the state's Flagship university and in keeping with Approved Planning Documents, Approved Project Documents, and Design Guidelines and Standards;
- B. the long term stewardship of LSU's facilities, environment, and space resources in support of the academic and strategic objectives of the university and in keeping with its unique, established, and nationally recognized aesthetic heritage; and
- C. establishment of the Campus Planning Oversight Committee (CPOC).

II. DEFINITIONS

Approved Planning Documents: any and all physical campus planning documents which have fully and appropriately been approved by CPOC and the Board of Supervisors and/or President as required by the Bylaws & Regulations and inclusive of the latest Campus Master Planning document and any approved updates, the latest South Campus Master Planning Documents and any approved updates, as well as any other fully approved district and area planning documents.

Approved Project Documents: any and all project documents for which schematic design and siting have been fully and appropriately approved. Signifies approval of the schematic design of the project, not approval of the project itself.

Design Guidelines and Standards: any and all campus design guidelines or standards that have been fully and appropriately approved; full approval of design guidelines requires approval by CPOC and the Board of Supervisors and/or President as required by the Bylaws & Regulations. Minor modifications of design guidelines and standards, as determined by LSU Planning, Design & Construction staff, do not require approval by CPOC or the Board of Supervisors.

Facilities: any building or portion thereof.

Facility Developments: any proposed new building, improvements, or modifications to any existing building or portion thereof, site, street, park or open space, or other tangible and relatively permanent feature under LSU's ownership or control.

Preliminary Feasibility Assessment: early stage (prior to proposal of a Facility Development design) exploration of programming needs, alternative concepts, and potential funding sources, including fundraising for the costs of such assessment activity.

Site: area, street, park or open space, or other tangible and relatively permanent feature under LSU's control. (See PS 70)

Strategic Capital Plan: a comprehensive, prioritized plan for all intended facility improvements on the LSU campus, regardless of funding source or contracting entity. The State Capital Outlay priorities are part of the Strategic Capital Plan.

III. GENERAL POLICY

This policy establishes a direction for campus facility planning and development and is to be comprehensive of all development within the boundaries of LSU property, inclusive of all Facility Developments, whether contracted by the university, its affiliated support organizations, Greek organizations, or other third parties. It functions to ensure that the campus environment is a place where students, faculty, staff, and the community at large can live, learn, work, and play safely in a setting that is aesthetically pleasing and supportive of the academic and core mission of the university. The policy represents a commitment to the protection of those architectural, functional, and aesthetic qualities that have distinguished the LSU campus since its inception. The policy affirms that the decision-making process with regard to space and facilities should emphasize public safety, efficiency, and the promotion of human comfort and environmental health.

Furthermore, the intent is to move toward a campus whose physical design promotes pedestrian mobility throughout campus in a manner that encourages positive interactions, enhances learning opportunities, and helps foster a memorable campus experience.

Prior approval by the President is required for all facility development initiatives. This includes engaging designers and communication with donors for fund-raising efforts involving Facility Developments (See Sec II. Definitions).

IV. PROCEDURES

- A. Administration and Planning Structure: The university coordinates the overall campus physical planning effort through the following administrative structure and functions:
 - 1. President: Provides final campus level authorization, in consultation with senior administration, for all Facility Developments..
 - 2. Executive Vice President & Provost:
 - a. Assigns priorities to programs

- b. Coordinates the overall administrative planning activities
 - c. Chairs the University Planning Council
 - d. Coordinates the academic program planning and financial implications with the Executive Vice President for Finance & Administration and CFO
 - e. Oversees space management
 - f. Works in tandem with the Executive Vice President for Finance & Administration and CFO to determine capital project priorities and budgets
3. Executive Vice President for Finance & Administration and CFO:
- a. Coordinates and implements the financial planning activities associated with operational, maintenance, and capital construction budgets.
 - b. Works in tandem with the Executive Vice President & Provost to determine capital project priorities and budgets.
4. University Planning Council (UPC): A body of faculty, staff, and student representatives chaired by the Executive Vice President & Provost that serves in an advisory capacity to the President and the Executive Vice President & Provost regarding academic planning, including academic space. This standing committee is the successor body to previous university strategic planning committees.
5. Campus Planning Oversight Committee (CPOC): An advisory committee charged with monitoring and making recommendations regarding the physical development of the campus in accordance with Approved Planning Documents, Approved Project Documents, and Design Guidelines and Standards, as defined in Section II. This standing committee is the successor to the former Facilities Design & Development Committee (FDDC).
- a. Functions: The general functions of the committee are:
 - i. Review and make recommendations regarding the university's long-range facilities development plans. This includes review and recommendations to the current and updated Campus Master Plan documents.
 - ii. Review and approve policies, procedures, and facility and site development guidelines.
 - iii. Perform the oversight activities associated with a comprehensive facility and site planning effort consistent with steps outlined in Planning Process (Section IV.C.).
 - iv. Approve Planning Documents, Project Documents, and Design Guidelines and Standards with recommendation to the President and/or LSU Board of Supervisors for further approval, as required.
 - v. Communicates actions to the Office of Academic Affairs and the Office of Facility & Property Oversight.

- b. Membership - Specific terms are outlined below; there are otherwise no term limits. The membership of the committee includes:
 - i. The Director of Campus Planning, who serves as chair of the CPOC
 - ii. The University Architect, who serves as a permanent standing member
 - iii. One voting representative appointed by each of the following for a one-year term:
 - a) Faculty Senate Executive Committee
 - b) Staff Senate Executive Committee
 - c) Student Government
 - iv. One voting faculty member from each of the following professional areas who serve as subject matter experts for three year appointments:
 - a) School of Architecture
 - b) School of Landscape Architecture
 - c) Department of Civil & Environmental Engineering
 - v. One voting representative appointed by each of the following to serve at discretion of the individual executive listed below:
 - a) Executive Vice President & Provost
 - b) Executive Vice President for Finance & Administration and CFO
 - c) Vice President for Agriculture
 - d) Vice President for Strategic Communications
 - e) Vice President for Student Affairs
 - vi. One voting representative from the Office of Risk Management
 - vii. The following entities and officials, while not members of the CPOC, will be notified of all CPOC meetings and agenda items in order to keep abreast of facility and site planning issues:
 - a) LSU Foundation
 - b) LSU Real Estate and Facilities Foundation
 - c) Assistant Vice President for Planning, Design, and Construction
 - d) Director of Parking and Transportation Services
 - e) Chief of Police
 - f) Tiger Athletic Foundation
 - g) LSU Alumni Association
 - h) Each academic dean
 - i) University Registrar
 - j) University Laboratory School Superintendent
 - k) Athletic Director
 - l) Associate Vice President and Chief Technology Officer
 - m) Assistant Vice President for Auxiliary Services
 - n) Executive Director of Facility Services

- o) Director of Office of Disability Services
- p) Assistant Vice President for Residential Life
- q) Executive Director of Student Health Center
- r) Executive Director of University Recreation

Associated entities will be provided the opportunity to give input on projects with which they are involved.

6. Office of Planning Design and Construction (PDC), a division under the auspices of the Office of Facility & Property Oversight (FPO):

- a. Manages and coordinates the Facility Development and Planning Process defined in Section IV.C. and prepares submissions for agenda items, as well as the Strategic Capital Plan, with recommendation for review by CPOC and/or the President and the Board of Supervisors, as required.
- b. Conducts needs assessment studies to determine the short-term and long-term space needs of the university community.

Documents existing conditions (current programs and survey of existing physical resources) and analyzes and evaluates needs for program growth and/or change as well as technical innovations and trends.

- c. Devises a strategy and action plan to meet needs using planning principles and development concepts through the development of Approved Planning Documents, Approved Project Documents, and Design Guidelines and Standards.
- d. Manages day-to-day activities associated with processing and/or evaluating proposals for space requests, assignments, changes, allocations, etc., to assist the Office of Academic Affairs in effecting optimum utilization of existing space resources and ensuring that the immediate space needs of the university community are identified.
- e. Unit (i.e. college, department, etc.) responsibility
 - i. In order to maintain an up-to-date inventory of space allocation and utilization, all facilities are assigned to a unit based on budget code.
 - ii. It is the responsibility of each unit to update university records on a continual basis when utilization of their assigned space changes.
 - iii. Units are required to confirm the utilization of the space on an annual basis. Requests for additional space should be directed to the Office of Academic Affairs via the Request for Allocation of Space Form (See Appendix III).

7. Office of Facility & Property Oversight's University Architect:

- a. Identify and document campus design characteristics that define the architectural nomenclature of the historic architecture.
- b. Provide vision and leadership in the development of campus design guidelines.

- c. Work collaboratively with the Office of Planning, Design & Construction (PDC: a subsidiary of the Office of Facility Property & Oversight) and design consultants to ensure compliance with design guidelines and standards for all new campus buildings, renovations, and site infrastructure.
- d. Act as liaison with the Board of Supervisors and the President for all interpretations of design project compliance with design guidelines.
- e. Provide leadership in consultation with the Office of PDC on the selection of design professionals.

B. Facility Development and Planning Process: The facility development and planning processes are managed and coordinated by the Office of Facility & Property Oversight utilizing the following strategies and action plans:

1. Provide oversight of the facility planning process to ensure compliance with Approved Planning Documents, the approved planning process, and the long term goals of the institution.
2. Monitor the application of the Campus Design Guidelines and Standards to the new design projects.
3. Provide oversight of the evolution of the Design Guidelines and Standards as required to adapt to changing financial and physical environment.
4. Encourage the efficient use of current and planned space and facilities.
5. Encourage the regular investment of resources to preserve the quality, character, and condition of campus facilities.

The Detailed Approval Process (Appendix II) includes the detailed process to be followed for Facility Developments and planning efforts.

C. Procedures for Review of Facility Development Requests: There are established protocols and procedures for the review, development, and approval of potential facility developments. Outlined are procedures for the development and review of two types of requests (Minor and Major). In all instances, there must be considerable collaboration at all steps within the planning process with the Office of Facility & Property Oversight, and in particular, the Office of PDC, as defined in the Detailed Approval Process (Appendix II).

1. Strategic Capital Plan: The annual Strategic Capital Plan, inclusive of the annual Capital Outlay Request, shall be submitted to CPOC for review, with further recommendation by the Office of FPO to the President and/or LSU Board of Supervisors for further approval.
2. Minor Requests: Minor Request procedures are followed for minor alterations and/or renovations to existing facilities and minor site modifications. The Office of PDC will review the minor requests and ensure there are no issues that warrant the use of the major request process. Minor requests would not require review by CPOC. All projects will be managed

and coordinated by the Office of PDC. A Project Initiation Form may be required for preliminary consideration of a project.

3. Major Requests: Major request procedures are followed when the proposal involves considerable renovations or alterations to the visual character of a facility, major alterations to the exterior environment, alterations to permanent sculpture and works of art, and/or requests that involve new construction or capital outlay funding. Considerable alterations to the exterior of an existing facility or a major site development must follow the major request procedure.

Most Major Requests move through various administrative levels and committees for review and/or approval prior to review by the President and approval as a potential project. This process ensures appropriate input from campus stakeholders, that requests are consistent with Approved Planning Documents, and that the planning process outlined above is followed (Section IV.C). Complex Major Requests (i.e. new facilities and major site developments or otherwise required by the Chair) will move through the CPOC a minimum of two instances.

The Dean (or equivalent) of the campus unit pursuing a Preliminary Feasibility Assessment shall notify the Office of PDC prior to initiating such activity; CPOC review is not required.

- a. Concept Phase CPOC Review: A major facility development request will consist of a general development outline and a preliminary program, cost-range, proposed site location, and a contextual analysis. Design solutions are not presented at this time. The CPOC reviews the request, ensures the request adheres to the Approved Planning Documents, and then makes a recommendation. A site decision for the specific request is determined as part of this review.
- b. Documentation Requirements for CPOC submission at the concept phases for Major Requests:
 - i. Development Outline
 - ii. Preliminary Program: a description of the project, space requirements and general scope of the project to meet the programmatic need.
 - iii. Cost Range
 - iv. Site Location
 - v. Contextual Analysis
- c. Schematic Design Phase CPOC Review - Once the Project has been fully developed conceptually, prior to full completion and acceptance of the Schematic Design Phase, the project request is reviewed a second time by the CPOC. (See Appendix I for requirements for schematic design submittal.) The CPOC will make recommendations based on:
 - i. Congruence of the request with Approved Planning Documents and Design Guidelines and Standards

- ii. Conformity of the project with the approved concept phase.

The Office of FPO will provide a recommendation to the Executive Vice President for Finance & Administration and CFO for further approval by the President and/or LSU Board of Supervisors, as required; the resulting acceptance and approval constitutes an Approved Project Document.

- d. For complex projects, ad hoc Facility Design Review Advisory committees may be established at the discretion of the CPOC Chair. The ad hoc committees may include individuals who are not members of the CPOC and will normally include design professionals. The ad hoc Facility Design Review advisory committees make recommendations to the CPOC based on their reviews of the criteria appropriate to each project.
- e. On a semi-annual basis, these approved changes/projects will be posted on the University Master Plan website maintained by the Office of PDC.

- 4. Master Plans and Other Planning Documents: Development of new campus master plans or planning efforts that effectively modify the latest campus master plan shall be submitted to CPOC for review. Planning efforts shall be reviewed by the committee with further recommendation by the Office of FPO to the President and/or LSU Board of Supervisors, as required, to be fully Approved Planning Documents.

D. Campus Planning Oversight Committee (CPOC) Process: The following outlines the prescribed procedure by which items shall be added to the agenda and reviewed by the CPOC at the regularly scheduled meeting as determined by the Chair. Items that require deviation from this schedule due to extraordinary circumstances (failure to plan accordingly does not qualify) may constitute having a special meeting as determined by the chair.

- 1. Documents necessary for projects to be added to the CPOC agenda must be received by the Office of Planning, Design & Construction (PDC) at least two weeks prior to a regularly scheduled CPOC meeting. The Office of PDC may require modifications to the documents and resubmittal. Final documents, acceptable to the Office of PDC, must be received by the chair of the CPOC for distribution prior to the scheduled meeting.
- 2. Documents must include a brief summary of the project, as well as all applicable items identified by the *Requirements for Facility Development Presentations before the CPOC* (See Appendix I).
- 3. Requests received after the prescribed deadline will be considered for the agenda of the next regularly scheduled meeting of the CPOC.
- 4. The Office of PDC will monitor planned developments and planning activities on campus and work with the Chair to determine which items may need review by CPOC.
- 5. The Office of FPO will submit a proposed agenda, complete with draft presentation and recommendations, to the Office of Academic Affairs and copy to the Office of Finance & Administration for approval of the agenda prior to the scheduled meeting.

6. The Chair of the CPOC will consider potential agenda items, approve the agenda, and distribute the agenda electronically to members of the CPOC for advance reviewing.
7. Chair shall be responsible for:
 - i. Management of meeting
 - ii. Documentation of attendance
 - iii. Documentation of meeting minutes
 - iv. Communication of decisions to the Office of Academic Affairs and the Office of FPO
8. Distribution of meeting minutes to all committee members and stakeholders (as enumerated in Sec.IV.A.5.b), the Office of the President, the Office of Academic Affairs, and the Office of FPO shall be in a timely fashion.
9. Appeals of decisions made by the CPOC shall be made directly to the Office of Academic Affairs.
10. All voting requires a quorum. A quorum is defined as a simple majority of voting members present on the CPOC. Decisions and recommendations require a simple majority of votes cast.

V. APPENDICES

- I. Requirements for Facility Development Presentations before the CPOC
- II. Detailed Approval Process
- III. Request for Allocation of Space Form

Appendix I

Requirements for Facility Development Presentations before the CPOC

Schematic Design Phase:

1. **Detail Sheet** – Name of building, general programmatic requirements with square feet, preliminary budget estimate inclusive of hard and soft costs including cost per square foot, a design narrative (no limit as to length) that discusses the design opportunities and approach for the building design, the engineering criteria including sustainability concerns that are essential for the building's design, and a brief narrative for each the major consultant disciplines (structural and MEP at a minimum) concerning the approach to the project's design. A written summary of the project's relationship to the current master plan and how it is contributing to the plan's objectives.
2. **Campus Master Plan** – A side by side presentation of the current master and the existing campus plan with the new building located on the existing plan. Plans to be presented at the same scale.
3. **Sector plan** – Side by side presentation of the campus master plan for the immediate sector of campus and the existing sector with the new building located on the plan. The plan should display the building outline with main entry points, parking lots (existing and proposed), major walks (existing and proposed), street names, predominant campus features in the area, and the general site development for the project -- plantings, paving, outdoor areas, etc. The plan should indicate how the project relates to the existing buildings and future projects in the immediate area.
4. **Site plan** – Display adjacent buildings in the immediate area including buildings on the other side of the street, landscape design with walkways, exterior stairs, retaining walls, planting and outdoor areas (both hard and soft), trees (existing and proposed), parking lots (with stalls and count), etc.
5. **Ground Floor Plan** – Include surrounding landscape features (plazas, courtyards, entry courts, auto drop-off, service area, etc.), room names (service/support areas with a grey background).
6. **Upper level floor plans** – Display all plans at the same scale, provide room names (service/support areas with a grey background).
7. **Major Elevations** – Provide surrounding context for height and proportional relationships. Elevations should display material color, shade and shadows.
8. **Exterior perspective** – Provide a sense of context.
9. **Interior perspective** – Major space.

Appendix II

Detailed Approval Process

Following is the process to be coordinated by PDC for Facility Developments that result in Approved Project Documents. **Bold** items require written approval by PDC prior to proceeding to the next design step.

- Preliminary Project Review – scope definition and preliminary budget development
- **Designer selection for any and all phases of design including Programming**
- Program Development design phase
- Consideration of Approved Planning Documents and whether project conforms
- Potential development of zone master plan modification for project
- Initial approval by CPOC at concept phase for conformance with Approved Planning Documents or creation of a new Approved Planning Document for CPOC approval as defined by the Planning Efforts process below
- **Program Completion design phase**
- Lease approval by LSU Board of Supervisors (if required)
- **Schematic Design phase**
- Second approval by CPOC of schematic design phase
- Approval by LSU Board of Supervisors of schematic design, as required.
- **Design Development**
- **Construction Documents**
- **Bidding and Award**
- **Acceptance**

(Appendix II continued)

Planning Process

The following describes the process to be followed and coordinated by PDC for planning efforts that result in Approved Planning Documents. **Bold** items require written approval by PDC prior to proceeding to the next step.

- **Preliminary Project Review – scope definition and preliminary budget development**
- **Designer selection for any and all planning efforts**
- Approval by CPOC of planning documents (may be reviewed by CPOC intermittently for major planning efforts)
- **Approval by LSU Board of Supervisors**

Appendix III **Request for Allocation of Space Form Link**