

# Understanding UWC USA Masterplan Study: A post-study summary

This memorandum summarizes the results of the recent studies commissioned by the UWC USA to understand the severity of the existing deferred maintenance situation and the potential redevelopment opportunity to create a campus that can better serve the community and the school mission.

## Overview

- Board received a masterplan report in 2019, which led to June 2019 board decision to pursue an 'Innovate for impact' (3B) option.
- 'Innovate for impact'(3B) addresses deferred maintenance and various renovations but also provides new academic buildings and at least one new residential building.
- 'Innovate for impact' (3B) is sequenced to be built over eight phases, in a time period out to 2035.
- Funding would occur over several campaigns, given the multi-phased approach to renovation and construction.

**Details for each option, including cost estimates and phasing strategy of the selected option, are explored in the memo below.**

## Background

UWC USA commissioned VFA, Inc to conduct a facilities condition survey in 2015 to understand the conditions of the facilities on campus. The survey identified deficiencies at 20 buildings across campus and recommended a schedule of work to be completed year by year from 2015-2035. The items belonged to categories like life safety, code compliance, reliability, etc. The total cost was \$35M in 2015 money and \$56M total escalated at 4.7% annually. Please note that the escalated value was not calculated based on a linear appreciation rate (4.7% annually) but based on sequencing of work identified and scheduled to happen within the time period.

At the end of 2017, UWC USA initiated a search for a design team to carry out a campus masterplan study. Atkin Olshin Schade Architects (Sante Fe) together with Surroundings and ARC were selected to perform the work. The final masterplan report was issued in June 2019.

## Masterplan recommendations

The masterplan report concluded with 4 options:

- A. Option 1. Maintaining the status quo
  - a. 2015 value: \$34.8M
  - b. Escalated: \$55.5M
- B. Option 2. Strengthening the foundation
  - a. 2018 value: \$54.7M
  - b. Escalated: \$77.5M
- C. Option 3A. Innovate for impact
  - a. 2018 value: \$62.5M (Lean) / \$70.9M (Full)\*\*
  - b. Escalated: \$80.5M (Lean) / \$90.4M (Full)\*\*
- D. Option 3B. Innovate for impact
  - a. 2018 value: \$61.2M (Lean) / \$69.9M (Full)\*\*
  - b. Escalated: \$81.9M (Lean) / \$92.5M (Full)\*\*

\*\* Two options provided: full and lean (full with more classrooms, 35 vs. 30, relocation of library, larger classrooms, labs, and other spaces).

Option	Cost \$Mio		Yr's	\$Mio/ Yr	Comment
	2018	Escalated			
1. VFA	38	56	20	1.75	No added space; just maintain
2. Foundation	55	77	20	2.5 soft	Deferred maintenance plus renovations (no new building)
3A: Improve	71	90	20	3.0+ soft	Residential split btw Upper & Lower Admin: 100% in OSH
3B: Redesign	70	93	20	3.0++ soft	Residential: 100% in Upper Academics: Quad/3 new buildings

**The Board voted to adopt Option 3B Innovate for impact during the June 2019 meeting.** See Board Action section below for details.

Also see below for details of the 4 options presented in the masterplan report and the phasing strategy for the selected Option 3B. All cost figures are escalated construction cost (2.5% annually) only.

## 1. Maintaining the status quo

- This is the option based onVFA’s recommendation and cost figures.
  - A. 2015-2025: \$31.25M on Life Safety, MEP, Exterior, Interior and Site Items
  - B. 2025-2035: \$23.75M on facilities renewal items.
- These numbers are for planning purposes and represent best practices. This would return to “like new condition” however a more detailed analysis would be needed to determine which costs are necessary versus recommended. Also, some of the items have been addressed since 2015.
- As noted, all work does not include any upgrades, remodels, ADA upgrades, or new space development.
- These costs are budgeted to be phased through 2035 and include escalation.
- These costs are construction costs. An additional 12% is recommended for professional fees, furnishings, and other owner costs.

## 2. Strengthening the foundation

- Addressed in this option are several items including deferred maintenance and a number of intensive renovation projects so buildings can better serve the campus. It does not include any additions or new buildings.
  - A. Facilities renewal: \$44.6M on academic, residential, administrative, portable and other facilities on campus.
  - B. Programmatic renovation: \$32.4M on academic, residential and administrative facilities on campus
- All facilities renewal (deferred maintenance) numbers are from the VFA Study from 2015. These numbers are for planning purposes and represent best practices.
- As noted, work includes intensive renovations to the Castle (vacant areas), Old Stone Hotel, Lower Dorms, Zeinal-Zade Science Center, and Geier Center.
- Portable Classrooms required to allow work to happen in any order.
- These costs are budgeted to be phased through 2035 and include escalation.
- These costs are construction costs. An additional 18% is recommended for professional fees, furnishings, and other owner costs.

## 3. Innovate for impact (3A)

- Innovate for Impact (3A) not only addresses deferred maintenance and various renovations but also provides new academic buildings. Renovations include consolidation of administrative uses.
  - A. Facilities renewal: \$28.7M on academic, residential, administrative and other facilities on campus.
  - B. Programmatic renovation/ New construction: \$51.8M (Lean)/ \$61.7M (Full) on academic, residential, administrative facilities, site and demolition on campus
- All facilities renewal (deferred maintenance) numbers are from the VFA Study from 2015. These numbers are for planning purposes and represent best practices.
- As noted, work includes intensive renovations to the Castle, Old Stone Hotel, and Lower Dorms.
- Three new academic buildings to be added.
- Street relocation required on lower campus.
- Entire option to be phased so new space provided for each use before demolition of old.
- These costs are budgeted to be phased through 2035 and include escalation.

- These costs are construction costs. An additional 25% is recommended for professional fees, furnishings, and other owner costs.

#### 4. Innovate for impact (3B)

- In this strategy deferred maintenance, renovations, new academic, and residential buildings are included. Uses are consolidated, including academic, administration, and residential.
  - A. Facilities renewal: \$26.8M on academic, residential, administrative and other facilities on campus, including:
    - i. old stone hotel: 18,055 SF
    - ii. Kluge Auditorium: 17,821 SF
    - iii. Castle: 97,602 SF (128 bed + 7 RT/aRT apartments)
  - B. Programmatic renovation/ New construction: \$55.1M (Lean)/ \$65.7M (Full) on academic, residential, administrative facilities, site and demolition on campus
    - i. Academic buildings: 54,000 SF (Lean)/ 81,000 SF (Full)
    - ii. Dormitory: 40,000 SF/128 bed + 8 RT/aRT apartments (52,000 SF/160 beds + 10 RT apartments with an additional dorm)
- All facilities renewal (deferred maintenance) numbers are from the VFA Study from 2015. These numbers are for planning purposes and represent best practices.
- As noted, work includes intensive renovations to the Castle and Old Stone Hotel.
- Three new academic buildings and one residential building to be added (second for later expansion).
- Street relocation recommended on lower campus.
- Entire option to be phased so new space provided for each use before demo of old.
- These costs are budgeted to be phased through 2035 and include escalation.
- These costs are construction costs. **An additional 25% is recommended for professional fees, furnishings, and other owner costs.**

#### Phasing Strategy for Innovate for impact (3B)

The masterplan recommends to implement Option 3B Innovate for Impact through 8 individual phases with careful sequencing so that the functionality of the campus is minimally impacted during construction. The configuration of new buildings has been calibrated to enable outdated facilities to remain operational until their replacement is available. For example, the new science building cannot be constructed in the same location as the existing science building, otherwise temporary facilities would be required. Please see below for phasing description extracted from the masterplan report.

## 1. Phase 1

2018 value: \$8.4M

This first phase includes renovating the vacant areas of the Castle into residential dormitory spaces. Currently, this space is being used for storage. However, this phase cannot completely replace one of the dormitories which means either fewer students being admitted or utilization of guest rooms temporarily to maintain the student population. Following this work, several buildings could be demolished, including B5 Faculty Residence and B1 Mont Blanc Dormitory. The last dorm cannot be moved until the new academic spaces are built to move them from the Castle.

## 2. Phase 2

2018 value: \$10.0M (Full)

2018 value: \$5.8M (Lean)

Phase 2 features several projects, including the building of A1, one of the new academic spaces to include Bartos Institute, IT, and Language classes. Built on the site of B1 Mont Blanc Dormitory, spacing will need to be provided to the adjacent building, B2 Chumolungma Dormitory. This new building would feature a lobby facing towards Kluge Auditorium. In the "full" version, it would also include the relocation and integration of the library. Following the construction of A1, the structure of G16 and the tennis courts will need to be removed with these functions to be located elsewhere. In addition, over the summer, work to remove partitions in existing residential dormitory areas could be completed should there be a desire to create four bedroom rooms.

## 3. Phase 3

2018 value: \$15.3M

Following the completion of Phase 2, a new landscape circulation path between the new academic building and upper campus could be added. During this phase, the major work would include building the 2018 value: \$15.3M new residential building R1. This would add 128 beds to the campus, allowing for the demolition of B3 Kilimanjaro Dormitory and B4 Denali Dormitory at the conclusion of this phase. In addition, Building C, the Geier Center, could be removed. This phase would begin the process of adding the new street between Old Stone Hotel / President's Residence and the private residences. The old route would not be taken out until later in the process but use could be restricted.

## 4. Phase 4

2018 value: \$10.3M (Full)

2018 value: \$7.8M (Lean)

This phase features the building of the new academic building A3 to include the social sciences and music programs. It would feature a lobby facing towards Kluge Auditorium. A3 would be located at the former area of B3 Kilimanjaro Dormitory and B4 Denali Dormitory. There would be no demolition as part of this phase.

## 5. Phase 5

2018 value: \$3.9M

Phase 5 would feature the build out of the rest of the Castle currently used for academic or administrative usages. All of the Castle would become residential student dormitories. Work would include improvements to the courtyard of the Castle. Following the completion of this work, B2 Chumolungma Dormitory would be demolished. At this stage, all residential projects would be completed.

## 6. Phase 6

2018 value: \$10.4M (Full)

2018 value: \$8.4M (Lean)

Included in this phase is the building of the new academic building A2 which would contain the math and science spaces. This building would be located where B2 Chumolungma Dormitory currently is situated. It would allow the academic quad to be completed with needed landscaping. A2 would front this quad and provide an axial connection to Kluge Auditorium. Following the completion of this work, building D, Zeinal-Zade Science Center would be demolished. Building L, the Anixter-Poole Recreational Pool and the adjacent greenhouse would be removed.

## 7. Phase 7

2018 value: \$6.9M

This stage would feature the renovation of Old Stone Hotel as administrative space. The work could be broken up between this phase and the final one by floor in order to allow continual usage. Work would require adding an elevator and other accessibility improvements should be made. Further study is required. Landscape work could be completed with the renovation work and would include adding parking in the area currently bisecting campus with a street. This former street, along with the areas vacated by Building C Geier Center and Building D Zeinal-Zade Science Center, would also be appropriately landscaped with water-conscious vegetation to rejoin the campus together. At the end of this phase, the music wing of Building I Kluge Auditorium would be removed.

## 8. Phase 8

2018 value: \$4.6M

Phase 8, the final phase, would include any remaining work for the Old Stone Hotel to make the building fully administrative. It would include the building of the lobby addition where the former music wing stood for Kluge Auditorium. The landscape spine would be built to integrate with the landscape circulation work from a prior phase. It would feature an outdoor amphitheater and other outdoor classroom space opportunities. The lobby for the auditorium would face towards this spine, creating a clear axial relationship with the academic quad. The landscape spine would connect between the historic Turf Oval and the upper campus Castle, creating an outdoor nexus for the campus.

## Board action

The study was presented during June 2019 Board meeting. Extended discussion followed. The Board voted to adopt Option 3B Innovate for impact as an aspirational direction, pending other factors including funding availability, phasing study, detail program analysis, etc.

Key reasons for adopting Option 3B include:

1. It is the most mission-aligned;
2. It brings the community together in cohesive and collaborative residential and academic environments;
3. It creates more environmentally sustainable facilities.

The board also noted that all options had the common first step of building-out of the Castle for increased and improved dormitory space and to free up real estate for subsequent work.

Please note that further, more detailed studies on each phasing and building are required as next steps once the Board decides to initiate the masterplan implementation.

## Facilities committee recommendations

The current school annual budget includes \$1M for capital projects. The fund is to be used for facilities and infrastructure maintenance, renovation, equipment purchase, etc, and to address the list of deferred maintenance items from the VFA study.

While the final masterplan report presented the VFA study recommendation as an option (Maintaining the status quo), **it is the Facilities Committee's opinion that addressing the deferred maintenance is not optional.** (Note that the other 3 options also have facilities renewal integrated into their cost estimates.) While the Board has voted to adopt Option 3B Innovate for impact, we can not forgo regular facilities upkeep and we can not stop addressing the deferred maintenance items, since it could well be years before the school implement any of the masterplan items. It is also the Facilities Committee's recommendation that items of life safety, code compliance, infrastructure reliability and accessibility be given priority in funding allocation so they can be addressed first in order to minimize any risk of interference of normal campus operations.

The masterplan option selected involves renovation and new construction of up to 240,000 SF of space with 8 individual phases. The first phase involves the renovation of the vacant areas of the Castle into residential dormitory spaces. There are many items, such as funding availability, programs, student population, etc, that need to be figured out ahead of the project. When the school is eventually ready, the Facilities Committee recommends soliciting the help of a professional architectural design team via a RFP process to carry out the design of the project.