

Site Selection Process

U N I V E R S I T Y O F I L L I N O I S



Chicago



Springfield



Urbana-Champaign

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Prepared by the University Office for Capital Programs and Real Estate Services

INTRODUCTION

A campus master plan is an ongoing process of interpreting the facility needs of the campus in terms of established objectives and guidelines intended to achieve the desired physical environment. The selection of a site for capital improvement or addition is (in part) a process of testing, reaffirming, and applying the guidelines established by the master plan. At the University of Illinois, the Site Selection Process is an important component in the Facilities Delivery Process. The following flow diagram overviews the process stages.

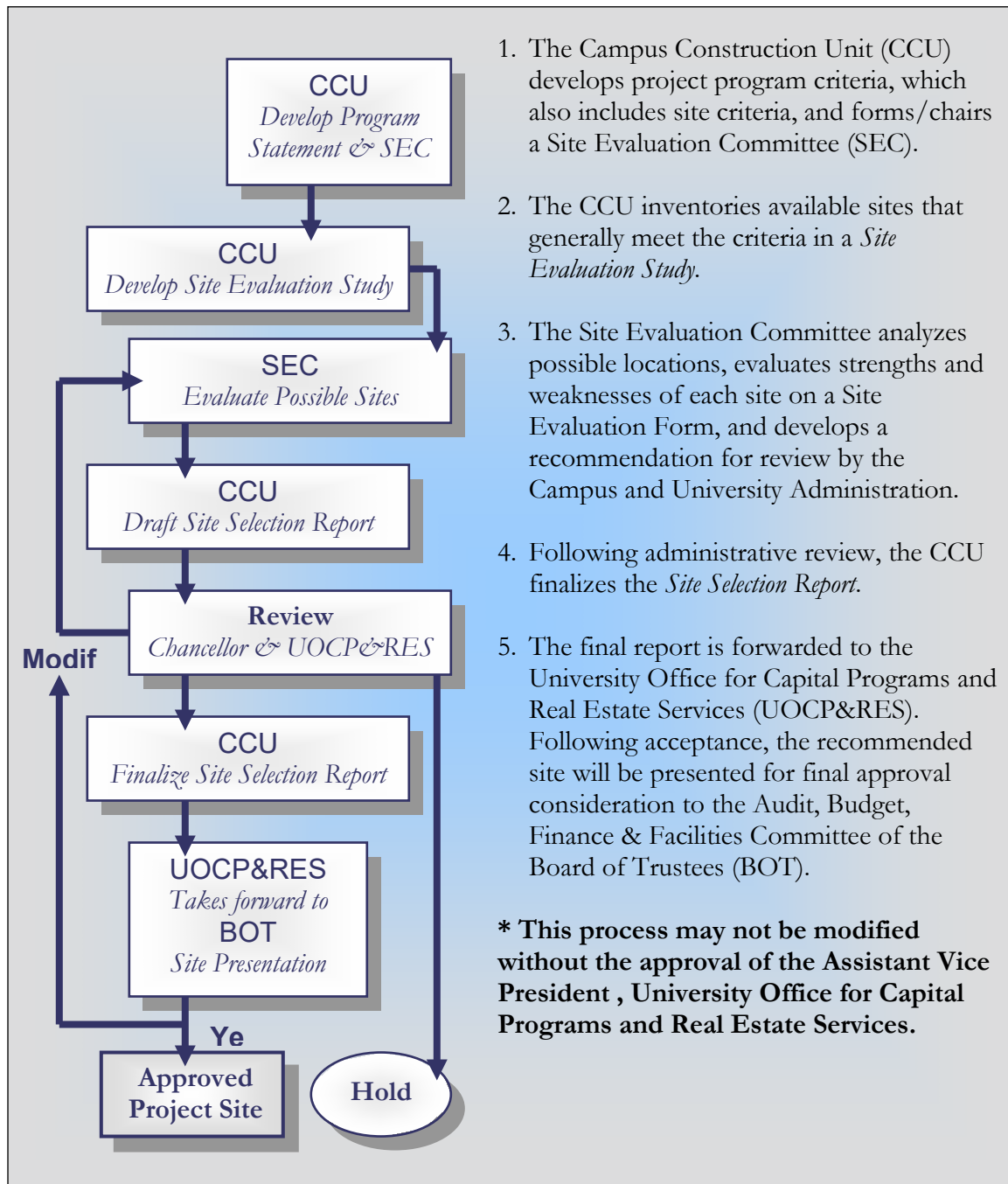


Exhibit 1: The Site Selection Process overview.

SITE SELECTION PROCESS

The Site Selection Process offers a consistent and efficient means to choose locations that accommodate new or relocating programs.

SITE EVALUATION COMMITTEE

Once the Site Selection Process has been initiated, it will require some standardized protocols in order to evaluate the possible sites for capital improvements. The first is establishing a Site Evaluation Committee to recommend a preferred site. A successful site evaluation effort should include the input of a number of professionals with a variety of expertise. The team should be selected on the basis of the particular needs of a given project. Therefore, the Site Evaluation Committee will be chosen by the Campus Construction Unit and will include a member from the University Office for Capital Programs and Real Estate Services. While it depends on the specific project, the evaluation team typically includes (3-6 individuals) a campus planner, a space planner, a physical plant representative, a University Office for Capital Programs and Real Estate Services (UOCP&RES) representative, a real estate representative, and a representative of the user agency (college, department, or division).

SITE EVALUATION STUDY

Identifying locations that merit consideration is the sole purpose of the *Site Evaluation Study*. This list should not be too narrow as to risk eliminating those sites that may be less obvious; yet, it should not be so large that it becomes unwieldy. General guidelines used in compiling the list include:

- A size approximating what is required;
- A reasonable location for the program under consideration; and
- University ownership (or reasonable acquisition availability).

Experience suggests the list of sites compiled for consideration may be as few as three or upwards of ten. Those preparing the study must use their best judgment in developing the list of sites; however, a good rule of thumb is that if there is a question of whether or not to include a particular site, it should be included.

The detailed *Site Evaluation Study* of potential site locations should be prepared by the Campus Construction Unit staff or with the assistance of a professional consultant. Utilization of Architect/Engineer (A/E) consulting services for a *Site Evaluation Study* may well be the first step in a professional services contract that carries the project through design, construction documents, bidding, and construction.

A practicable *Site Evaluation Study* should include:

- **Cover** page showing the name of the project, campus identification, and the date of the Site Selection Committee meetings.
- **Summary** page from the Committee Chair explaining basic site program needs, the project's background and vision, and any pre-meeting instructions to the committee.
- **Site Evaluation Committee List** page including names, titles, the office each member represents, and any relevant contact information (such as email address).

- **Site Identification Map** page showing all site locations overlaid on a current master plan (optimal), campus map, or aerial photo.
- **Site Summary** page(s) identifying the site's assigned letter (corresponding with the *Site Evaluation Form*) and showing more individual site location maps and some pertinent information about each site. [see Exhibit 2]
- **Site & Program Criteria** page(s) explaining initial perceptions about how each criterion might be considered for evaluation. [see Exhibit 3]

Site B



Oregon Street

The site area is 0.22 acres and is located on the south side of Oregon Street east of the Music Building. The site is currently occupied by an apartment building not owned by the University.

Exhibit 2: Example of a Site Summary entry in a *Site Evaluation Study*.

Site Criteria

Parcel Size - Is the site an appropriate size to accommodate the proposed facility? Consideration should be given to proper land coverage ratios, building heights, and site development.

Facility Expansion - Is there facility expansion space available on site? Consideration should be given to the possibility of future expansion of the facility whether or not it is identified in the program statement.

Physical Characteristics - Do the site's physical characteristics afford ease in construction of the proposed facility? Consideration of soil conditions (if known), slope, existence of mature or specimen plant materials, and other site-specific factors should be taken into account.

User Access (Vehicular/Pedestrian/Bicycle) - Does the site have adequate user access (various modal linkages) to the campus as a whole? Consideration should be given to the quality of access to the site from other areas of campus and the general community. [If the project under consideration warrants it, these items may be treated as separate categories.]

Service Access - Does the site allow for ingress/egress of service vehicles and personnel? Consideration should be given to reasonably direct and uninhibited access (including maneuvering space for trash removal equipment) to the facility delivery and maintenance areas.

Utility Access - Are the required main utility lines available at this site? If utility mains must be extended from another location, is the cost reasonable? Consideration should be given to adequate sizes for the expected capacities.

Parking (Auto/Bicycle) - Is sufficient parking available proximate to the site or (if needed) can it be added on or near the site? Consideration should be given for visitor (automobile) parking. [If the project under consideration warrants it, these items may be treated as separate categories.]

Demolition - Does use of this site require removal of another structure, parking lot, *etc.*? Consideration should be given to the desirability of this removal as well as its cost.

Land Use Compatibility - Does the proposed land use relate to surrounding land uses and general land use priorities? Considerations should be given to the general guidelines of the campus master plan and basic planning principles.

Architectural Compatibility - Does the proposed facility relate well to the visual quality of surrounding facilities? Consideration should be given to design characteristics such as size, mass, interrelationship with other structures, *etc.*

Master Plan Compatibility - Does the proposed facility relate well to the Board of Trustees approved campus master plan? Consideration should be given to long-term plan objectives.

University Ownership - Is the site owned by the University or the University of Illinois Foundation? Consideration should be given to whether or not it can be acquired as well as under what circumstances and cost.

Other - As required for a specific project.

Program Criteria

Program Priorities - Of all programs (academic, administrative, operational, *etc.*) possibly located at this site, is the one under consideration the highest and best use?

Program Dislocation - Will locating the proposed facility at this site dislocate another program? Consideration should be given to the dislocation significance to the overall scheme.

Program Relationship - Will locating the proposed facility at this site functionally enhance the program? Consideration should be given to the functional relationship between the proposed facility and auxiliaries at this site.

Urban Impact - Will locating the proposed facility at this site have a positive or negative impact on adjacent, existing facilities? Consideration should be given to building(s) shadow intrusions, parking demand, traffic congestion, municipal services loading, public safety, *etc.*

Aesthetics - Will this site offer characteristics desired for this program? Consideration should be given to appearance, psychological image, public relations visibility, *etc.*

Other - As required for a specific project.

Exhibit 3: Explanations of Site and Program Criteria considerations.

SITE EVALUATIONS

Once the *Site Evaluation Study* list of possible sites has been compiled, each site shall be evaluated according to how well it ranks with the Site and Program Criteria considerations. Initially, criteria value rankings may be somewhat subjectively established; therefore, different values should be discussed to establish a hierarchy that can be agreed to by all members of the Site Evaluation Committee who have different responsibilities and perspectives. By this means, a consensus site recommendation can be more easily found.

Step 1

The Site Evaluation Committee chair sends the *Site Evaluation Study* and *Site Evaluation Form* to each committee member prior to the evaluation committee meeting.

Step 2

Each member of the Site Selection Committee completes a *Site Evaluation Form* independently and prior to the meeting. Completing the evaluation prior to the Site Evaluation Committee meeting allows members to both familiarize themselves with the listed sites, to establish which criteria might be more pertinent from their perspective, and to consider any additional sites that may not have been identified in the study. Therefore, to get a feel for the strengths and weaknesses of each site considered, committee members should use the following scale when individually evaluating Site and Program Criteria.

Addresses Criteria:

1 - Poorly **2** - Somewhat **3** - Adequately **4** - Well **5** - Best

Step 3

The Site Evaluation Committee should discuss the scale for each criterion to enter into the *Site Evaluation Form* to reflect weighted values of some criteria over others. For instance, in a storage facility project, site “Aesthetics” usually will not significantly contribute to the programmatic success of the project and thus might either be scored on a scale of 1-2 or not scored at all. However, that same storage facility project may score the criterion of “Service Access” on a scale of 1-10 since the value of good ingress and egress to the site is critical.

Once a group consensus on values and criteria has been reached, committee members shall then revise their forms and evaluate each site with regards to the value-adjusted rating scale. Each individual’s site evaluation score should then be summated. A composite of all committee members’ scores should be calculated. If the composite scores and ranks do not concur, the committee should provide brief comments explaining discrepancies along with any other pertinent comments they wish to add to the form. [see Exhibit 4]

UNIVERSITY OF ILLINOIS

SITE EVALUTATION FORM

Campus / Project: Campus Location / Project Name

Committee Member: Member's Name Date: Meeting Date

Site Criteria	Value (0 -)	Site A	Site B	Site C	Site D	Site E	Site F	Site G	Site H	Site I	Site J
Parcel Size	5	5	4	4							
Facility Expansion	5	5	3	4							
Physical Characteristics	3	1	3	3							
User Access	7	6	4	3							
Service Access	8	7	8	6							
Utility Access	5	5	3	4							
Parking	10	8	9	6							
Demolition	5	4	5	5							
Land Use Compatibility	7	2	6	4							
Architectural Compatibility	9	8	8	8							
Master Plan Compatibility	10	10	7	9							
University Ownership	5	3	5	5							
Other <u>Community Access</u>	8	6	8	8							
Program Criteria	Value (0 -)	Site A	Site B	Site C	Site D	Site E	Site F	Site G	Site H	Site I	Site J
Program Priorities	9	7	9	6							
Program Dislocation	2	0	2	1							
Program Relationship	6	5	6	3							
Urban Impact	4	4	4	4							
Aesthetics	8	6	8	5							
Other	0	0	0	0							
Score Totals	116	92	102	88							
Site Ranking		2	1	3							

Comments: Relevant information/explanations not captured in the matrix above.

UOCP | December 2002

Exhibit 4: Example of a completed *Site Evaluation Form*.

Step 4

At the Site Evaluation Committee meeting, the Site Evaluation Committee Chair compiles a summary score sheet with a composite site evaluation (representing a consensus) to use as the basis for developing a ranked Site Recommendation. Once a majority (>50%) of the group agrees to a final ranking, all members should initial the chair's compiled score sheet

[illegible]

Site Selection Process · 8

SITE SELECTION REPORT

Following the successful identification of the top three sites (minimum) in ranked order, the Campus Construction Unit prepares a *Draft Site Selection Report*. Included in this draft shall be a statement of pros and cons for a minimum of the top three sites. The report is first presented for acceptance to the campus' Chancellor and then the University Office for Capital Programs and Real Estate Services.

The Campus Construction Unit then finalizes the *Site Selection Report*, which is presented for approval to the Board of Trustees. This report presents a single site recommendation and its justifications. Depending on the nature of the site and/or project, the detail of the report may vary but shall be coordinated with The University Office for Capital Programs and Real Estate Services.

A *Site Selection Report* should include:

- **Cover** page showing the name of the project, campus identification, the date of the Board of Trustees meeting, and any relevant project graphics/photos (if available).
- **Project Description** page (briefly) explaining the project's background and vision as well as its site requirements. [see Exhibit 6]

Project Description

The proposed Science Classroom building will provide (much needed) expanded classroom and office facilities for the Science Zone's deficiencies. A strong link for these classroom facilities exists between Illinois Hall, Clark Hall, as well as the existing and proposed labs in the area. The expectation is for these classroom facilities to serve all the science disciplines within the entire Science & Research Zone on campus. Due to the proximity of the campus community, University groups, public schools, and various other community groups may also utilize these high-tech facilities from time to time for lecture, meeting, and seminar space during the evenings and weekends.

As the primary function of this facility is to expand classroom space for the science disciplines, the site location is dependant on adjacencies within the Science and Research Zone. Having a campus community function as a secondary concern of this facility, it is also critical that the building's character be integrated into its surrounds and that special event automobile parking facilities be somewhat convenient.

Exhibit 6: Example of Project Description text in the *Site Selection Report*.

- **Site Identification Map** page showing the site location overlaid on a current master plan (optimal), campus map, or aerial photo. [see Exhibit 7]



Exhibit 7: Example of a Site Identification Map in the *Site Selection Report*.

- **Site Recommendation** page explaining the project's location, benefits, and any relevant details (*e.g.* how the facility might impact the neighborhood). [see Exhibit 8]

Site Recommendation

Site C, located on University Street east of Jones Hall is recommended for the new project site. Of the sites considered, this site best fulfills the established site and program criteria. The proposed project development at this site will be an asset to the University, as well as the whole community.

The site is of adequate size but with limited expansion space (depending on the initial site layout). This building site has a good access to pedestrian and bicycle routes. The site is consistent with the current master plan, relocates no existing program, and has no program impact on adjacent sites. Required utilities are immediately available to the site.

The site is near related programs and is within reasonable proximity to the campus core. The Main Street corridor provides community access and proximal identification for special events. Special event parking may be accommodated after University hours in the University parking deck south of the Clark Hall.

With a maximum of three stories above grade, the proposed facility will be similar in scale to the buildings surrounding the site.

Exhibit 8: Example of Site Recommendation text in the *Site Selection Report*.

- **Site Concept Drawing** page identifying (if necessary) the schematic layout of the recommended site. [see Exhibit 9]

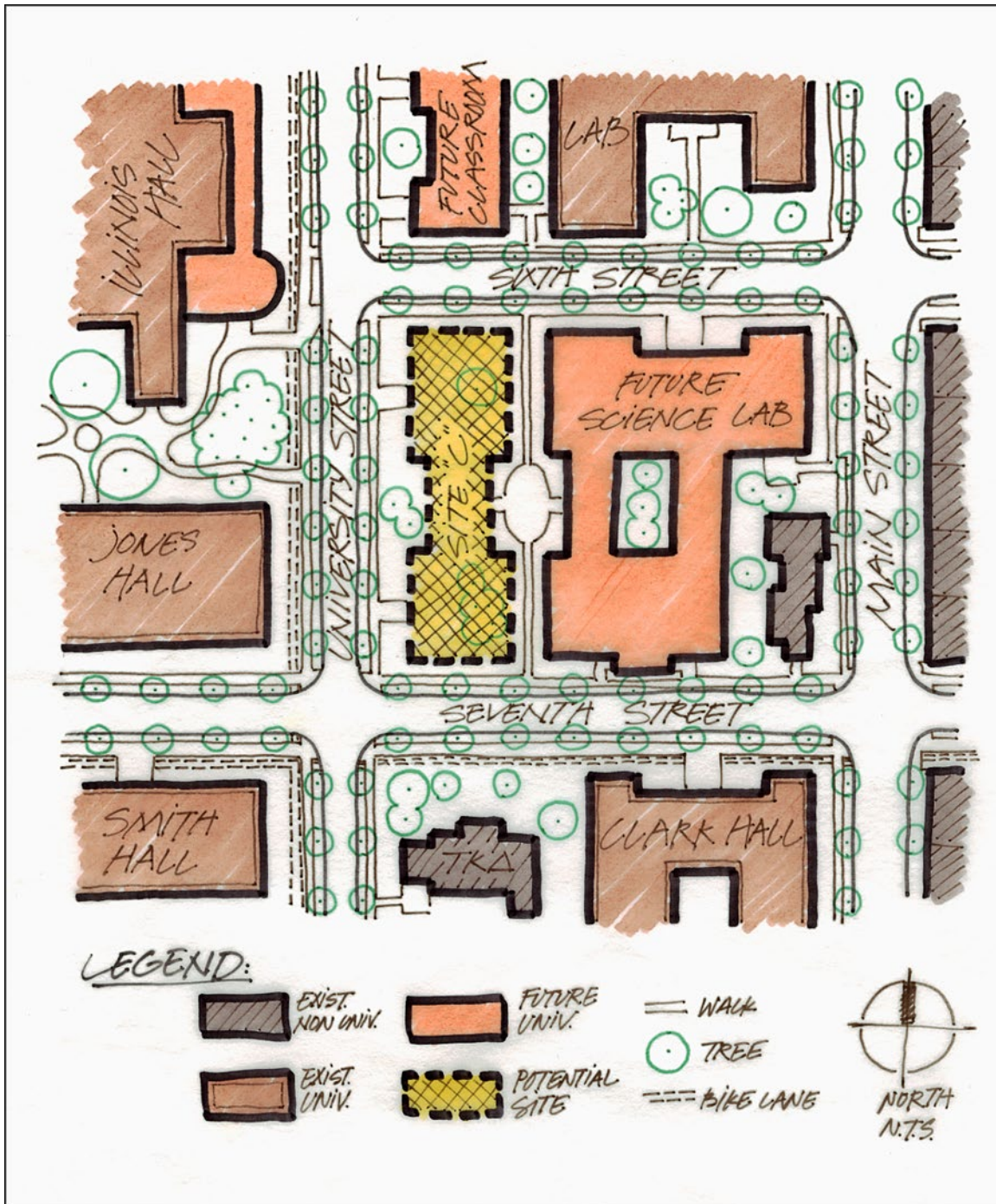


Exhibit 9: Example of a Concept Drawing in the *Site Selection Report*.

* The following pages are blank copies of the *Site Evaluation Form* and the *Committee Site Evaluation Summary Sheet* for the convenience of the site evaluation committee members.

SITE EVALUTATION FORM

Campus / Project: _____

Committee Member: _____ Date: _____

Site Criteria	Value (0 - _)	Site A	Site B	Site C	Site D	Site E	Site F	Site G	Site H	Site I	Site J
Parcel Size											
Facility Expansion											
Physical Characteristics											
User Access											
Service Access											
Utility Access											
Parking											
Demolition											
Land Use Compatibility											
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Master Plan Compatibility											
University Ownership											
Other											
Program Criteria	Value (0 - _)	Site A	Site B	Site C	Site D	Site E	Site F	Site G	Site H	Site I	Site J
Program Priorities											
Program Dislocation											
Program Relationship											
Urban Impact											
Aesthetics											
Other											
Score Totals											
Site Ranking											

Comments: _____

COMPOSITE

COMMITTEE SITE EVALUTATION SUMMARY SHEET

Campus / Project:

Committee Chair:

[illegible]**Comments:**