

Interim Project Planning Report for the Expansion of the Rotman School of Management

November 14, 2006

Table of Contents

I. Membership	1
II. Terms of Reference.....	1
III. Background Information	2
IV. Statement of Academic Plan	3
V. Space Program	7
VI. Functional Plan	12
VII. Environmental Impact	12
VIII. Special Considerations	13
IX. Resource Implications	15
X. Funding Sources	16
XI. Schedule	16
XII. Recommendations	17
Appendix 1. Space Inventory.....	19
Appendix 2: Capital Cost Estimate.....	20

I. Membership

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Mary-Ellen Yeomans, Assistant Dean, Administration & CAO, Rotman School of Management (Co-Chair)
Laurence Booth, Faculty member, Rotman School of Management
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Suzanne Spragge, Assistant Dean, External Relations and Chief of Staff, Rotman School of Management
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Larry Harrison, Director, IT Services, Rotman School of Management
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Christopher Charlesworth, MBA Student, Rotman School of Management
Anton Ovtchinnikov, Ph.D. student, Rotman School of Management
Julian Binks, Capital Projects Planning
Jennifer Adams Pepper, Campus and Facilities Planning, (secretary)

II. Terms of Reference

The project Committee must address the following items:

1. Identify the demand for additional academic space necessitated by enrolment and program growth within the Rotman School of Management.

2. Demonstrate that the proposed space program will be consistent with the Council of Ontario University's space standards. This will require some assessment of all existing and additional accommodations in relation to the total faculty, staff and student complements.
3. Identify all secondary effects, (including site remediation if hazardous materials are present) and including space reallocations within the existing building, impact on the delivery of academic programs during construction and the relocation if necessary, of existing units currently accommodated on Site 11.
4. Consult with the Food Services Ancillary should any change in food services be anticipated.
5. Address campus wide planning directives as set out in the campus master plan, open space plan, urban design criteria, and site conditions that respond to the broader University community.
6. Identify equipment and moveable furnishings necessary to the project and their estimated cost.
7. Identify all data and communication requirements and their related costs.
8. Identify all security, occupational health and safety and accessibility requirements and their related costs.
9. Determine a total project cost estimate for the capital project including all aspects identified above.
10. Identify a funding plan for capital and operating costs.
11. Report by May 19, 2006.

III. Background Information

In September 2002, a Project Committee was established to investigate the space requirements of the Rotman School of Management. From this investigation the most pressing need determined was to address office accommodation for faculty members and instructors related to the expanded activities of the Full and Part-time MBA, Ph.D., Commerce and EMBA/Omnium programs within the School. In response, additional offices were constructed by adding a 4th and 5th floor over the south wing of the building.

In the fall of 2004, newly constructed OSM classrooms were completed to accommodate the University of Toronto's Commerce program as primary users on the lower level of the Woodsworth Residence building enabling dedicated Commerce classrooms in the Rotman building to be reassigned to the Rotman School of Management.

Most recently, approval to relocate the Commerce administrative offices from the Rotman building to ground level space in the Woodsworth Residence building has enabled additional space to be vacated for the use of the Rotman School.

The Rotman School of Management continues to maintain impressive academic standing among the very best international schools of management and business. Such progress is tied to the quality of the physical facilities and infrastructure which have been established and available within the Joseph L. Rotman Building. These facilities house the various programs offered by the Rotman School of Management. However, even with Commerce spaces being made available to the School, the rapid growth of Rotman programs and their need for additional facilities far outpaces available space.

This Project Committee is charged with addressing the immediate and longer term, steady state space requirements of the Rotman School of Management consistent with approved academic plans and the future objectives of the School.

Significant work has been accomplished over the past months with participation from the larger committee and its subcommittees set up to report on existing and projected space requirements of specific areas of the School. Existing space constraints have imposed severe limitations on the student study space, research facilities, administrative services and capacity to offer executive programs. At the same time, the School has been reviewing its long term academic plans and is planning an ambitious programmatic and research-oriented expansion which will include growth to student, faculty, staff and research complements and therefore drive the need for additional space allocations. A preliminary space program that indicates the full space needs of the Rotman School of Management in its envisioned steady state by 2014 has been prepared and included in this report. A new building will allow the School to remedy existing shortcomings and will allow for the planned expansion.

This space program does not include the space requirements of the Schools Executive Development Programs for various reasons – primarily because these are greater than can be accommodated on the preferred site adjacent to the existing Rotman School. Similarly, space requirements for the Commerce Program have been separated from the current project plan and will only be addressed once program redesign is completed and the administration of the program is resolved.

The space requirements identified in the draft space program for the Rotman School exceed the approved envelope capacity of the preferred development site (Site 11). This site and others on the St. George campus are being examined as part of the 10-year review of the Part II Plan. It is expected that additional capacity will be sought for this site.

IV. Statement of Academic Plan

Historical Background

Business education has been offered at the University of Toronto for more than one hundred years, and became formally organized with the establishment of the Faculty of Management in 1971. In 1997, in recognition of a donation from Sandra and Joseph Rotman to support its vision and goals, the School was renamed the Joseph L. Rotman School of Management.

In 1998, following the appointment of Dean Roger Martin, the Rotman School's academic plan for the "Raising Our Sights" cycle (referred to as Plan 2004) outlined a competitive strategy for moving the Rotman School forward to a position of international distinction. The stated goal was to place among the top 20 business schools worldwide by the end of the planning period, and – even more ambitiously - among the top 10 within seven to ten years.

'Raising our Sights' in Retrospect

Plan 2004 identified goals and strategies for the School, and their implications for the growth of faculty complement, graduate and undergraduate program development and delivery, research, and support infrastructure. In essence, the plan involved a significant increase in the scale and scope of all the School's activities.

Much has been achieved since then. Strong support from the University, the Rotman Foundation and other donors, has allowed the Faculty to build on academic strengths over the last seven years to significantly advance all the original objectives. Some of the most significant achievements thus far have been:

- Implementation of major curriculum reforms in the MBA program structure, focusing on teamwork and cohort principle, the creation of streams of electives, and the strengthening of interpersonal skills. Most important, however, the program has been reshaped by incorporating significant integrative program components as well as innovative courses aimed at fostering students' integrative thinking skills. The Rotman School now offers one of the most innovative programs world-wide.
- continued improvement to the quality, calibre and diversity of its students while at the same time doubling the size of its MBA Program. The entering class has doubled, while entering MBA GMAT scores have increased to the mid-600 range, placing current students in the 85th percentile (or higher) of GMAT writers worldwide, in direct competition with all but the very best schools.
- reformatting and launching of a very successful 3-year version of its MBA Program, which is delivered in the evening in the lock-step style of EMBA, with cohorts moving through the program together over a 3 year period
- reformatting and launching of an innovative one-year EMBA Program, which has reduced the opportunity costs for students from 24 months to 13 months without sacrificing program content.
- an increased scale, scope, and reputation of its PhD program by developing PhD streams in two new areas, doubling the size of the program, and significantly improving the placement of its PhD students at top international business schools
- Rotman has been persistent in its pursuit of incremental curriculum reform in the Commerce program, offered jointly with the Faculty of Arts & Science, and is able to attract top students into the program. In addition, significant improvements in the student experience for Commerce students have been spearheaded by the Rotman School, such as a new Career Services Centre and a new classroom complex at Woodsworth College.
- Outstanding faculty research has reaffirmed the School's reputation as the leading business research centre in Canada. Internationally, the Financial Times ranks the research strength of the School 17th. Faculty members continue to receive national and international scholarly recognition. The School has become an attractive destination point for top academics to pursue their research.
- new faculty have been recruited at all ranks – and from leading international schools - in all areas of the School, with more than 50 outstanding new faculty joining our ranks since 1998/99, bringing the total complement to 92.
- information technology has dramatically improved in the School. Since 2002, the Rotman Web Portal serves as the major interface between students and faculty, as well as the School and its alumni base.

In the pursuit of these objectives, Rotman has been helped by great success towards augmenting its resource base:

- There has been dramatic expansion of Executive Education activities, in particular by enlarging a customized program portfolio. Over the six-year period since 1999, executive education revenues have quintupled, and were instrumental in supporting teaching and research advances.
- Permanent endowments have been established for many of its top academic priorities and has increased its endowment from under \$20 million to over \$90 million by the end of 2004/2005. The next phase of its development plan is well underway, with an even more ambitious fundraising target of \$200 Million.
- The number of chairs, professorships and endowed research activities in the School have been raised from a total of 9 to a total of 36.
- An innovative new system of financial aid, including an interest-subsidized loan program for all MBA students, attracted highly qualified students on a competitive market.
- Finally, the Rotman School has steadily advanced in the MBA rankings over the last four years. The School was ranked #21 in the world in the 2003, 2004, and 2005 Financial Times rankings of the top 100 business schools globally representing the steepest climb of any of the top 50 schools over the 2001 to 2004 period.

Most significantly these improvements have been achieved under severe space constraints; the current building having been planned to accommodate only about half the student and faculty numbers presently housed in the building. Space constraints have imposed severe limitations on student study space, research facilities, administrative services, and the capacity to offer executive non-degree programs. A new building will allow many of these shortcomings to be remedied.

The Next Phase: 'Stepping Up'

Building on the School's achievements, the current 'Stepping Up' Academic Plan outlines a range of new programmatic and research initiatives with the objective of moving forward decisively toward an even greater position of international recognition and ranking. The plan focuses on quality improvements, such as significant curriculum redesign, improved student experience, intensified recruiting efforts and improved selection criteria.

At the same time, the plan outlines a staged process of programmatic expansion, in line with the University of Toronto's overall objective of expanding graduate enrolments and research focus. After the Stepping Up plan was completed, it was updated in light of the Reaching Higher graduate expansion plans. Over the coming years, between now and 2014, the Rotman School will:

- Further expand the size of its flagship MBA program by three new cohorts (in either the two- or three-year stream), i.e. increase admissions by about 195 , and correspondingly student numbers by about 390 . The aim is to achieve an entering class of 520 students in six sections of the 2 year stream and 2 sections of the 3 year stream.

- Create new opportunities for specialized flexible entry points into the MBA programs, e.g. professional streams, compressed program for commerce undergraduates, among others.
- Introduce (effective September 2007) a new Masters of Finance Program with an annual intake of 120 students in the steady state;
- Gradually increase the size of the PhD Program from today's 70 students to about 95.
- Further undergraduate program initiatives will await the upcoming external review of the Commerce Program as well as subsequent consultations between the faculties involved.
- The School will continue its rapid expansion of the Executive Education portfolio. The Executive Development Programs, primarily in the form of customized programs, are essential tools to directly impact the business community. They are also indispensable to assure the financial viability of the School's expansion and generate public visibility.
- There will be expansion of existing research centres and institutes as well as establishment of new areas.

The enrolment expansion plans of the School are fully in line, and have indeed in part anticipated and pre-dated, the University's overall thrust towards graduate expansion. Much of the adjustment should be in place by the University's target date of 2009/2010 and it is expected to be completed fully by 2014.

The further expansion of the Rotman School's program portfolio, combined with an increase in student numbers in all graduate programs which have been approved by the Vice-President and Provost, will necessitate an additional increase in faculty complement, beyond the target levels envisioned in Plan 2004. The intent is to grow the School's complement to a total of 146.80 FTE's by 2014. That would imply a further complement expansion of about 50% relative to the current faculty size of about 90 FTE's.

In the new planning phase, the Rotman School will also further expand its broad research activities, organized around a significant number of research centers. Current research activities include the Institute for International Business, the University of Toronto Capital Markets Institute, the Centre for Finance, the Centre for Health Sector Strategy, the AIC Centre for Corporate Social Responsibility, the International Centre for Pension Management, and the Clarkson Centre for Business Ethics and Board Effectiveness. Other centres are planned, among several, in the areas of Leadership, Real Estate and Urban Economics, and Innovation and Entrepreneurship. These centres will give additional focus and international visibility to the School's research efforts.

Of particular note in this regard are two larger centers that are at the core of the School's mission: the Desautels Centre for Integrative Thinking (DCIT) and the (planned) Centre for Jurisdictional Advantage (CJA). The DCIT is a center of academic excellence in the study and teaching of integrative thinking and is core to the Rotman School's broader mission to create and promote a new model for business education. The CJA is slated to become a globally recognized powerhouse focused on researching the determinants of

economic competitiveness and prosperity. The term 'jurisdictional advantage' was coined to describe the work of a geographically defined area (city/state/province/country) to construct an environment that confirms on firms located in the jurisdiction competitive advantages over firms located elsewhere. Both centers will achieve global pre-eminence and are important anchors of the Rotman School's reputation.

None of these additional activities can be contemplated in the existing Rotman School building. The School's ambitious programmatic and research-oriented expansion plans are predicated on a new facility to relieve the pressure on the current building and to accommodate program expansion.

The Rotman School : an International Leader in Business Education

The Rotman School is now poised to take the next step towards unambiguous international pre-eminence and distinction. The School's extremely positive trajectory over the last few years has been supported by programmatic innovation and a strong research focus of its faculty. The current academic plan advocates some further program growth, combined with continued research excellence and an expanded executive education portfolio.

The business school market is truly international, and the Rotman School must benchmark itself against the globally leading schools. The international competitive environment remains challenging and the Rotman School faces significant resource challenges. Internationally, the School still stands out in terms of the breadth of its program portfolio, being among only three schools (Rotman, NYU, Texas) offering the full breadth of undergraduate and graduate programs. And it is doing so with a markedly smaller resource base. Yet smart and nimble strategic behaviour will offer great opportunities, such as the ones the School has exploited successfully over the recent years. With its increase in scale during the past seven years, the Rotman School has achieved a scale of operations that positions it well against the international competition. It now must significantly expand its facilities to provide the appropriate environment for vastly increased student numbers, additional programs, increased complement, and significantly broadened research activities.

V. Space Program

Overview of Existing Space

The Rotman School of Management currently occupies approximately 5875 nasm (9410 gsm) within purpose built facilities located at 105 St. George Street. Since the time of its construction, the School has continued to grow its complement of Faculty, Students and Staff and its programs. Some changes to the original building, including the addition of a 4th and 5th floor to the south wing have helped to accommodate growth somewhat, including for the recently approved Master of Finance Program but are not sufficient to support the current or long-term plans of the school. The current inventory is displayed in Appendix 1.

Detailed analysis of the School's current and planned growth identify additional space needs which will more than double its current space complement. Growth to the academic cohorts and research endeavors within the school will have ripple effects in the number of faculty and administrative staff complements and ultimately to space needs in general. Figure 1 illustrates the existing and planned growth to Faculty, Staff and Student complements.

Figure 1: Existing and Planned Growth Complement Plan

Faculty	current FTE	2005 approved plan FTE	2014 proposed Total FTE
Faculty Complement	98.49	130.00	146.80
Research Centre Complement	7.60	no FTE info included	22.00
Administrative Complement	103.30	no FTE info included	137.00
Business Information Centre	8.00	no FTE info included	10.00
Executive Education (non-degree)	25.93	no FTE info included	52.00
Students			
MBA (2year)	520	650	780
Advanced Standing Students (2 yr MBA)	n/a	25	60
MBA (3year)	195	390	390
EMBA	110	95	110
Omnium (formerly GEMBA)	80	no FTE info included	80
Master of Finance	0	50	240
PHD	73	95	95

Space Allocation and COU Analysis

Analysis of space allocation based on Council of Ontario Universities (COU) standards suggests that to fully accommodate the Rotman School of Management in its current configuration would require an additional space allocation of 1147nasm and that with all anticipated growth to 2014 a maximum additional allocation in the range of 6500nasm would be required. The detailed analysis is in progress.

The proposed draft Space Program follows in Figure 2:

Figure 2: Proposed Space Program	total existing & proposed nasmm
Faculty Offices	2136
Other Faculty Offices (Emeritus, visitors, etc.)	264
PHD Program Student Offices	442
Research Centres	
Centre for Jurisdictional Advantage	
<i>Competitiveness Program (CJA)</i>	423
<i>International Business Program (CJA) :</i>	182
Desautels Centre for Integrative Thinking	
<i>Program in Integrative Thinking (DCIT)</i>	279
<i>Program in Leadership (DCIT)</i>	56
<i>Program in Entrepreneurship (DCIT)</i>	56
Medium Sized Research Centres (7)	392
Area Research Centres (3)	132
Financial Research and Trading Lab	240
Behavioral Research Lab	125
Research Journals/Content Generation	24
Business Information Centre	604
Central Administration /Staff Offices	904
Program Administration/ Staff Offices:	
MBA Programs	495
Masters of Finance Program	24
PHD Program - Private Staff Offices	15
EMBA /Omnium Programs	144
Administrative and Faculty Support Space	
Meeting Rooms:	461
Communications Centers :	99
Reception Areas and Coat Rooms:	137
Lounges /Recreational Space :	404
Kitchens/Food Service:	271
On Site Storage:	445
MultiMedia/AV/IT Space:	120
Classrooms & Multipurpose Teaching/Event Space:	2856
Study Space (non-BIC): MBA/EMBA/MOF Programs	1452
Lockers	153
Student Clubs and Associations	62
TOTAL ROTMAN SPACE NEED (NASM)	13398
Existing NASM	5876
Total New Space Proposed (NASM)	7522

Faculty FTE/Faculty Accommodation

Faculty offices are allocated within the plan for each full time FTE faculty member. Several additional offices are included to accommodate spaces for Emeritus Professors, UTM and UTSC Professors with teaching responsibilities on the St. George Campus, visitors and others.

Research Space

The School's December 2005 Academic Plan outlines in detail the activity of nine active Research Centres/Institutes at the School, as well as the plans for additional focus areas of research. With only three exceptions, at the present time these Centres are virtual, and the new Rotman building will provide a physical home for these activities.

Included in the allocation are two large Research Centers:

1. The Centre for Jurisdictional Advantage, which includes the Competitiveness Program and International Business Program
2. The Desautels Centre for Integrative Thinking, which includes the Program in Integrative Thinking, the Program in Leadership, the Program in Entrepreneurship and Innovation, and the Designworks™ Innovation Studio

The Centre for Jurisdictional Advantage and The Desautels Centre for Integrative Thinking are both the focal point of flagship research initiatives of the School (integrative thinking, competitiveness and prosperity). They are also critical to the School's efforts to fund the expansion. Correspondingly, the space plan allocates significant facilities to those two activities, which will be necessary to establish both as internationally leading centers of research. Currently, the Designworks™ Innovation Studio is accommodated offsite in 336nasm of leased space on Prince Arthur Avenue. The space program for this Studio assumes that some of the infrastructure in the leased space will be available on site 11.

Seven medium sized Research Centres are included in the program and include:

1. Centre for Health Sector Strategy
2. Centre for Finance Studies
3. AIC Centre for Corporate Social Responsibility
4. Clarkson Centre for Business Ethics and Board Effectiveness
5. UofT Capital Markets Institute
6. International Centre for Pension Management
7. Centre for Real Estate and Urban Economics

Three smaller Area Research Centres are included and a small amount of space is provided for research journals and content generation.

In addition, included in the proposed research space are two research/teaching spaces:

1. The Financial Research and Trading Laboratory,
2. The Marketing and OB Behavioural Laboratory

The Financial Research and Trading Lab is a physical space funded by ORDCF. It was designed as a teaching space when the full time MBA count was 120FTE. With expansion of the student body, corresponding expansion to the laboratory is necessary.

The Behavioural Research Lab was officially created in 1995 when the current facility was opened. As the community of researchers at Rotman interested in behavioural issues has grown, the lab has provided a focal point for interaction, investigation and learning. More recently the need for a state-of-the-art laboratory facility has become critical with the advancement of the Integrative Thinking agenda at Rotman.

Administrative Complement and Administrative Accommodations

A projected increase in administrative complement is required to support the planned growth of student and faculty bodies as well as to satisfy Academic Plan goals of improving program delivery, career services, and other support functions for the School to remain internationally competitive.

The proposed space program allocation includes offices for all planned administrative staff. The plan also includes administrative and faculty wide support spaces including

several meeting rooms and larger events and conference type rooms to support the myriad of activities planned within the School.

A media production and viewing facility will assist faculty and students with the preparation of presentations, lectures and other material requiring multi-media production. In addition a media relations room will be located in the building allowing faculty to be interviewed for news programs from the Rotman building. This facility will also allow for teleconferencing and other remote media requirements to be fulfilled.

A large 400 seat theatre is included in this allocation and will allow the entire 1st year MBA class to gather for lectures, symposia, guest speakers, etc. The room is to be very flexibly designed to allow for reconfiguration and division and will be used as event space as well.

Although the room will be Rotman space and not Office of Space Management (OSM) space, the space will be made available on occasion for other University uses when not booked for Rotman classes and events. An overview of large classrooms on campus shows that only three other rooms of this size are available by OSM bookings. Fall 2005 data shows that large classrooms are running at 67% of the COU standard and within in the core hours of 10:00 to 14:00, these rooms show relatively high utilization (80-90% used). As such, an additional large classroom space such as this would be well used if made available outside of Rotman School needs.

A cafeteria/dining area with seating that satisfies both the MBA and EMBA program requirements and also the greater Rotman population at large will be included. To service this cafeteria a large kitchen with additional capacity for catering to other areas in the building is included in the program.

Student Spaces

Adequate space will be provided to accommodate the current complement of graduate students of 978 FTE (648FTE accommodated within week-day offered programs), and the planned complement of students 1755FTE (1110FTE accommodated within week-day offered programs).

Included in this allocation will be offices to accommodate PhD Student research, dedicated group rooms for 1st year MBA students to accommodate group work, lockers, and to provide a sense of belonging to this group. A number of bookable group study and meeting rooms are also included for upper year MBA and PhD students as well as open table seating and carrels as currently exist at the Rotman School.

Classroom Spaces

Additional classroom facilities will be required. The total number across the Rotman campus will include seven large 70-seat tiered classrooms with deep continuous desks and comfortable loose seating. These rooms will be used by the MBA, MFIN, and EMBA classes. As enrolment is expected to be 65 per MBA class, each classroom has been sized to accommodate a full class plus a maximum of 5 visitors.

Seven 40-seat tiered classrooms will be necessary in the program to accommodate smaller elective classes offered to upper year MBA, PhD, EMBA and MFIN classes. Several of the existing classrooms will be reconfigured to better accommodate this smaller number of students.

One flat-floor 70-seat classroom must also be included in order to allow for different types of teaching styles that are not properly accommodated in a tiered-seating environment. It is expected that several classes will change format to make use of this space. The room will offer a flexible format with advanced instructional technology and videotaping capability to also fulfill the classroom needs of the Teaching Effectiveness Centre. This space will also be available for events bookings and other uses when not in use for classes.

The classroom area will have 10 breakout rooms in close proximity to allow for their use during classes.

Library Spaces

The Library (BIC) currently occupies 192 nasm of space currently which is a reduction in its original planned space because of subsequent changes to space allocation in the building. The increased cohorts of students generate additional library space. Included in the increased space will be additional offices for full time librarian staff, increased study space and carrel and table seating, a small area for research display and a meeting/training/consultation room that will allow for small group training without disturbing students studying within the library.

VI. Functional Plan

Preliminary planning of spaces within the existing and new building has identified the MBA program spaces would best be accommodated within existing and renovated facilities at 105 St. George Street, to the extent possible New classrooms, research centre spaces and additional student, faculty and administrative spaces including any dining and large gathering space will be located in the new building at site 11, 91-97 St. George Street. In order to provide seamless delivery of programs and services, every effort should be made to connect the existing and new building(s) at one or more levels.

Classrooms should be, where possible, clustered together and may be located below ground provided they are well designed and adequately accessible. Existing classrooms will continue to be used but may require some modification to provide the requested loose seating in all rooms. Technology in existing classrooms should also be reviewed and updated where necessary.

VII. Environmental Impact

Better environmental designs can significantly reduce operating costs over the life of the building; conversely, a poor design can add considerably to not only operating costs but also can provide a less than comfortable working environment for its users.

Under the Universities *Environmental Protection Policy* and the revised *Design Standards Manual*, this project can serve as a positive example for sustainable building on campus.

The design team should pay particular attention to:

- building orientation, form and envelope to maximize the use of natural energy or passive strategies such as the use and control of sunlight, ventilating air movements, and diurnal and seasonal temperatures,
- minimize energy use for heating, cooling and lighting through the careful design of the building envelope, mechanical and electrical systems, and the use of low energy fixtures in combination with natural daylight and task lighting wherever possible,
- water conservation through the use of water saving fixtures and close-looped equipment cooling systems,
- metering of energy and water use in the building, or parts of it,
- building materials, finishes (e.g. paint), furnishings (e.g. carpets) and furniture which are not only emission-free (to provide building occupants with highest quality of indoor environment) but also were the most environmentally friendly in their manufacture and installation,
- provision of recycling depots for source-separation of waste throughout the building to meet the needs of the University's recycling and waste reduction programs,
- conveniently locating waste receptacles to minimize litter,
- creating a sufficiently large central area for the consolidation of and access to recycled materials and waste,
- directing rainwater (roof) runoff from the City's stormwater system and other sources of 'gray' water to satisfy landscaping needs,
- using water penetrable systems in outdoor areas where hard landscaping is required to minimize flows to the City's stormwater system, and choosing paving materials to assist the University in minimizing the amount of salt used in snow and ice clearance,
- the design of roofs and access to them to permit future use as campus open space by building users, where practical,
- the landscape design to promote local plant species that require low maintenance,
- the design of outdoor spaces for all-season use, with shade and cool air movement for the summer, and sun-trapping and wind shelter for winter use.

The Committee recognizes that all of the above strategies may not be practical to implement. However, the design team and the building's users must make an earnest effort to ensure that this building, when viewed in its entirety, will satisfy the environmental goals set out by the University.

VIII. Special Considerations

Accessibility, Access and Security

The University of Toronto is committed to ensure that its buildings and services are accessible to persons with disabilities. The University's Barrier Free Design Standards can be found at:

http://www.fs.utoronto.ca/userfiles/page_attachments/library/10/8156_1161423_accessibility_8156_1560105.pdf

It is the intention of the University that, in new construction, these standards be implemented in full, that all requirements indicated as "should be met" will be understood

as “shall be met”. While this is also the University’s intention for renovations to existing buildings, where a requirement indicated as “should be met” is impossible to meet given the constraints of the existing conditions, comparable alternative arrangements are to be explored.

The project’s Total Project Cost (TPC) estimate includes a line item for a Universal Design Consultant. This consultant is intended to be brought into the design process in a timely manner that will easily permit the incorporation of the consultant’s recommendations into the built project at its conceptual stages.

This building will be operational throughout the week, 24 hours a day. The building design must allow its users and visitors access at any time, safely and easily. At the same time, the design must be sensitive to the needs of the users whose activities will restrict access by the general public and also limit access to other building users.

Campus Planning

The University of Toronto Area Part II Plan identifies available sites within the University of Toronto area which are available and have municipal approvals for development. This plan goes beyond height and density limits by providing as-of-right permissions for development within prescribed envelopes which dictate height, setbacks and other site related requirements. Site 11, one of these sites, is located directly south of the Rotman School of Management building on the east side of St. George Street and is, therefore, well situated to accommodate further Rotman School space. The site encompasses two existing buildings at 91 and 97 St. George and a surface parking lot.

The design guidelines require retention of the building facades of 91 and 97 St. George, a service/pedestrian laneway and setbacks from surrounding heritage buildings including the Newman Centre and Church to the south, and Massey College to the east.

Since the time that the Part II Plan was implemented in 1997, intensification of development in general within the downtown core has occurred. In addition, many of the University of Toronto development sites have been built on and few prime sites remain. The University is now reviewing development sites to maximize their development potential within the current climate of intensification and also looking for new sites for development opportunities on campus.

Any building on Site 11 will require a sensitive approach to the numerous important and historically significant structures surrounding it. The Newman Centre to the south provides a good example of the red brick and terracotta residential structures that once were predominant on the length of St. George Street between College Street and Bloor Street. Massey College, important in its own right architecturally, sits low and quietly to the east of the site. In addition, the new building should respond to the existing Rotman School building and form a dialogue with it that demonstrates a cohesive Management campus architecture.

Servicing of the new structure will occur from the existing rear lane and will need to be carefully planned with respect to pedestrian passage and surrounding building conditions as well as ease of access within the working building.

IX. Resource Implications

Operating Costs

2006 Operating Costs for the Rotman School of Management building at 105 St. George Street have been calculated at \$198.00/nasm. It can be assumed that this cost, plus that of any yearly increases would apply to all new and existing spaces occupied by the Rotman School. Assuming the proposed space program is implemented (7522nasm/15,044gsm), a total operating cost for the entire Rotman Campus (in 2006 dollars) would be approximately \$3 Million per year.

Moving and Staging

Construction should be phased in such a way to allow for the new structure to be completed and occupied before major renovations of the existing building occur. Such a strategy would minimize disruption to the ongoing workings of the School. However, some temporary relocation of faculty, staff, students and student related space may be necessary as the spaces considered for the new structure will not match those in the existing building. Furthermore, consideration is being given to integrating the two buildings, and some dislocation would occur as a result.

Secondary Effects

Relocation of current occupants of 91 (CIUT and Sexual Education) and 97 (Classics) St. George will be required as part of this project and the costs of relocation included in the total project cost estimate.

91 St. George currently accommodates CIUT Radio within approximately 345 nasm. An additional 46 nasm is allocated within this building to the Sexual Education and Peer Counselling Centre for a total building area of 340nasm.

97 St. George Street accommodates the Department of Classics in approximately 530 nasm.

In addition, 44 parking spaces will be displaced from the site. As part of the City of Toronto Parking by-law for the University, this number of spaces should be replaced elsewhere on campus to maintain the by-law requirement of 2160 parking spaces.

Prior to completion of the final project report plans for relocation will be developed with each of the affected units.

Total Project Cost Estimate

At this point no detailed cost estimate has been prepared, rather this is a top level series of allowances based on escalated unit rates for peer U of T projects. The building is conceived at present as having a similar level of architectural cladding, finishes, and articulation as the present Rotman building, without necessarily mimicking them.

The assumption made with respect to escalation is that the project would be tendered as a lump sum contract sometime in mid-2008. An allowance of 5-6% pa should be made for a tender past that point.

For the purposes of this draft, the building is assumed to have an area of 15,000 Gross Sq Meters, with two levels below grade and approximately ten stories above. For discussion purposes a single level of parking under the building is also assumed, but the feasibility of the entrance and exiting situation requires further review. A single level might accommodate between 35 and 40 cars.

The lane would be relocated to the South to a point immediately north of 91 St George to connect to the existing N-S lane. A new curb cut would be required, plus modifications to the landscaping, and relocation of a fire hydrant. This would allow the direct connection of the new building to the existing building at its South East wing, although some alterations would be required to make this attractive and useable. The new building would bridge over the lane and connect to a new wing built on the site of 91 St George, while retaining its façade.

The program implies a certain amount of reorganization of functions within the existing building, but the extent has not been defined at this time. For the purposes of this estimate it has been assumed that approximately one third of the space will be affected.

There is allowance in the estimate for the unusual site situation of having to preserve and integrate the facades of the two houses into the new facilities. There are also allowances for site services.

There is also an allowance for “green” initiatives and enhancements.

Lastly there is an allowance for the relocation of the existing occupants of 91 and 97 St George. The Department of Classics, CIUT and Sex Ed Centre are located on the site and occupy 920 nasm. Detailed discussions with these units will determine a relocation plan and associated costs will be provided in the final project planning report. The total project cost identified in this interim report provides an allowance to relocate the current activities into other renovated space on the campus.

The top level cost range for this project estimates a total of approximately \$100,000,000. A breakdown is provided in Appendix 2.

X. Funding Sources

The total projected cost of the new Rotman Building on Site 11 is \$100,000,000. The early funding for this project will be assembled primarily from external sources and identified in the final report. It is not anticipated that long-term borrowing capacity will be required for this project, although short-term financing may be necessary.

XI. Schedule

This Interim Report is being brought forward for approval in principle of the increased space needs for the Rotman School of Management and to assign the site to this project to initiate fundraising. Further refinement of the space requirements and costs will be necessary to finalize the project committee report. As such, a final report is expected to come forward for approval in the spring of 2007. Further review of schedule will be included in the final report.

XII. Recommendations

That the Planning and Budget Committee recommend to the Academic Board:

Subject to approval by the Governing Council of a completed Project Planning Report that will identify the detailed space program of the Rotman School of Management, the total project cost and all sources of funding,

THAT the Interim Project Planning Report for the Rotman School of Management be approved in principle to accommodate the activities and functions described for the expansion of the School's programs on 91-97 St. George Street (site 11).

Appendices:

Appendix 1. Space Inventory..... 19
Appendix 2: Capital Cost Estimate..... 20

Appendix 1. Space Inventory

105 St. George Street Space Inventory as of October 2006

Department	Category	NASM	total NASM
Ancillary Serv	Food Facilities	4.23	7.43
Bldgs & Grounds	Plant Maint	8.33	8.33
Executive Development	Classroom Service	1.71	4.66
	Dept Supp Staff	13.63	124.26
	Faculty Offices	19.17	19.17
	Food Facilities	33.51	48.89
	Non-Tiered Clas	9.61	42.28
	Office Support	6.85	6.85
	Tiered Classrm	53.45	106.10
	subtotal Executive Development		352.21
Executive MBA	Classrm Service	1.71	4.66
	Dept Supp Staff	11.60	92.51
	Faculty Offices	24.80	24.80
	Food Facilities	33.51	48.89
	Non-Tiered Clas	9.61	42.28
	Office Support	5.95	15.03
	Tiered Classrm	53.45	106.10
	subtotal EMBA		334.27
Management	Bookstore/Merch	4.36	4.36
	Classrm Service	8.21	82.34
	Dept Supp Staff	20.62	949.59
	Faculty Offices	20.38	1,534.78
	Food Facilities	1.91	1.91
	General Lounge	56.22	298.62
	Grad Stdnt Off	22.90	187.59
	Library Col Spc	71.64	71.64
	Library Support	40.73	121.33
	Non-Tiered Clas	16.88	33.76
	Office Support	0.78	369.54
	Oth Academ Appt	14.65	47.66
	Res Lab Support	6.53	6.53
	Research Lab	71.08	104.62
	Sched Class Lab	71.08	71.08
	Std Off/Supp	5.37	53.46
	Study Space	13.51	592.34
	Tiered Classrm	135.63	643.26
	subtotal Management		5,174.41
	TOTAL Existing Building		5,876.65

Appendix 2: Capital Cost Estimate

Top level cost ranges for the proposed expansion of the Rotman School of Management

These are Total Project Cost ranges based on peer UT buildings and order of magnitude estimates for additional work as detailed below.

All figures assume a construction tender as a lump sum issued by by mid 2008. Allow 5% pa escalation on all thereafter.

Item		probable TPC range
1	Base academic building of 15,000 GSM to a standard of construction and interior and exterior finishes, details, furnishings etc similar to the existing Rotman building	\$75,000,000
2	Premium for enhanced A-V systems in teaching spaces	\$3,000,000
3	"Green" initiatives premium.	\$2,000,000
4	Site difficulty premium (site 11). Work around and protect existing structures, 91 & 97 St George, Newman House & Church, Massey.	\$5,000,000
5	Premium connection and bridging costs, connection and modifications at Rotman, and bridge over lane	\$1,000,000
6	Premium site costs, create new lane, modifications at street & sidewalk.	\$500,000
7	Site services premium, Hydro.	\$500,000
8	Selective demolition of 91 & 97 St George	\$500,000
9	Renovations and staging within existing Rotman building - allow for 1/3 or 1,800 NASMs of renovation.	\$7,000,000
10	Relocate existing occupants of 91 & 97 St George into renovated space, 920 NASMs	\$3,000,000
11	Replace parking, 40 spots in 1 level underground facility on site 11.	\$2,500,000
		\$100,000,000
	prepared 9th Nov 2006 JCB.	