

## BUILDING COMMITTEE TASKS – PLANNING PHASE

### Introduction

The first step to achieving the goal the goal of a successful project is Planning, which is often skipped or glossed over. You can't eliminate Planning because the issues are fundamental. If you address those issues at the beginning, everything comes together as it should. If you address Planning only when you are forced into it, then you are in for a problem-filled experience. When you plan your project, you set the parameters for what a successful project must accomplish. If you don't know what a successful project looks like for you, you probably won't have a successful project.

### The Spiral

You will find that it is difficult to resolve all five issues simultaneously. Your issues will be interconnected and each one will affect the others. Only the simplest of projects can be planned in one “pass” through the issues. Often three or more passes are needed for a coherent plan. Your process for addressing all the issues is like a marble spiraling around the mouth of a funnel and addressing one issue after another. Your order for dealing with each issue is not crucial. Each lap builds on what has been learned and leads inevitably to the best, integrated solutions. The first laps are slower and longer because there are many possibilities to consider, but the later laps speed up as you eliminate options and zero in on the limited options that are really good solutions for you.

### ORGANIZATION

- Who will be members of the Building Committee?
- Does the committee have skills in Facilitating, Coordinating, Organizing, and Communicating?
- How many committee members will there be?
- Who will be chairperson?
- How formal will the committee be?
- Is there any staff to support the committee?
- Who are the project's stakeholders?
- Will any stakeholders be on the committee?
- How will you communicate both up and down, to stakeholders and constituents?
- What systems will you need – record-keeping, accounting, website, newsletter, etc?

### ORIENTATION

- Get clarity on the difference between Planning and Design.
- Review the 5 Key Issues
- Determine the vision / vision statement
- When and how often will the committee meet?
- What does the Building Committee need in order to do its job?
- How will the progress of the committee be documented?
- Who will be advised of the committee's progress?
- Will there be public relations events along the way?
- What has to happen by the completion of your project for you to feel that it is a success?

### KICKOFF

- Find out what you already know - brainstorm strategies to address the 5 key issues
- Then consider how will you determine and document: your NEEDS; your CONSTRAINTS; your CONTEXT issues; your BUDGET; your SCHEDULE.
- In what order will you address the 5 Key Issues?
- Set a tentative time-line for further investigation of each issue

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### **ROUND 1**

Develop a preliminary understanding of each of the 5 Key Issues. It is rarely possible to establish a strategy for one issue without considering the other four. Address the 5 Key Issues in sequence in Round 1 and begin integrating them in the following Rounds.

#### **NEEDS**

- Concentrate on just space for now and keep a list of anything else that comes up as a need.
- Make a preliminary Needs Assessment
- Inventory your existing space to establish a baseline
- Interview key staff / stakeholders to determine what your space needs are.
- Establish the expected future rate of growth.
- What time horizon do you want to plan for?
- Consider the impact of strategic plans on space needs.
- Document how much additional space is required.
- Will existing space be abandoned, converted to new use, or remain the same?

#### **CONSTRAINTS**

- Draw up a checklist of obstacles that you will need to address.
- What items can you investigate now?
- Standard issues include:
  - Zoning
  - Building Code
  - Storm Water retention/detention
  - Compliance with ADA
- Special Issues may include:
  - Soil Conditions
  - Flood planes
  - Easements
  - Hazardous Materials
  - Dept. of Transportation and impact on public roads
  - Parent organization approvals

#### **CONTEXT**

- Will you need more land?
- Obtain maps and aerial photos of the area from local planning agency (or Google).
- Obtain photos of the location or existing building exterior.
- Determine if there is a current topographic land survey.
- Determine if there has been a soils investigation performed in the past.
- Establish desirable connections / relationships of new construction.
- List out Pros / Cons of existing building.
- Consider: Location; Access; Neighborhood; Orientation

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### BUDGET

- Establish a preliminary budget
- Determine available funds
- Investigate sources of funds and amounts
- Consider loan vs. bonds vs. fund drive
- Insurance – what will be required?
- Contingency – determine appropriate amount
- Assemble an estimate of costs and compare to budget

### SCHEDULE

- Establish a preliminary Schedule
- Time-line for planning
- Determine key milestones – completion of planning, start of design, bidding, start of construction, move in
- Estimate the duration of tasks / events
- Consider time-consuming events: permits, approvals, funding
- Will there be PR milestones: announce project, share design, ground breaking, topping out, dedication / ribbon cutting / grand opening.

### ROUND 2

- Develop tasks for each issue
- Consider alternatives
- Re-visit all 5 key issues
- Cross-pollinate issues with what you have learned
- Take each issue further where possible
- Consider sub-committees, staff or consultants to study the issues more deeply
- Expand Needs to include:
- What new features are desirable?
- What new systems are needed?
- Describe the character / image you wish the facility to have.
- Create a provisional overview

### ROUND 3

See Round 2

- Further research of each issue in terms of one another
- Resolve constraints with a strategy
- Fix disconnects
- Balance stakeholders' issues
- What is the game plan for getting the project designed?
- What is the game plan for getting the project built?

### ROUND 4 ...

It is OK if you need Rounds 4 & 5 or more - this is important stuff. Just don't start the design quite yet; start design when you are satisfied that you have satisfactory strategies for the 5 Key Issues.