

Proper Planning of a Project

Understanding the scoping (or feasibility) phase to develop a successful project.

■ By Jeff Eriks

So you have decided whom you want to work with on your next project. Congratulations! Now the hard work begins.

This article will touch on the step from post-award through start of design and what needs to be accomplished in that phase in order to ensure that your project flows smoothly into the design phase. The process should be similar whether you have chosen a design/build firm or if you decided that you would prefer to hire an architect directly. The important part is that you have an idea and now that idea needs to be translated to reality by your design team.

The Initial Phase

This initial phase is called several different things in the marketplace. The term varies by company and is referred to as scoping, feasibility, pre-design, conceptual design, etc. This is the most important phase

in your project's development. The better things are defined in this phase, 1) the budget will be more accurate, 2) the timeline will be better defined and 3) the end solution will be better.

The first thing that should be gathered is the name and contact information for each project team member as well as their role and level of authority. This list will include owner team members, design team members as well as other members as needed such as the construction team. The importance of identifying each level of authority cannot be understated. This allows the design team to know who to go to for the decisions, feedback and clarifications within the project.

The "Need"

Oftentimes you, as the owner, have developed a "need". This "need" varies and will likely continue to morph as you work through the

Figure 1: Communication and teamwork.



Images courtesy of Cambridge Companies.



Figure 2: Research is a major function of this phase.

design phase. The more questions that are asked, the more you learn about the project and the more the “need” develops. It is typically based on internal factors that are affecting operations in a negative way. You could be strapped for space, growing, needing a different facility layout due to processes having changed, or adding/upgrading equipment, to name a few factors. It is the job of the designer to ask hundreds of questions in order to really learn and understand the “need” before they begin drawing anything. It would be irresponsible of a designer to begin drawing based on just the owner’s ideas and thoughts of the project alone. The designer should be responsible for learning and understanding the “need” and then developing options that address the need for you to consider.

It is important for the owner to understand the significance of the designer asking these questions. The owner may get frustrated if he feels that it is wasted time since the owner already knows what the “need” is and what is required for the design and/or build. This process is essential to the designer, since they cannot fully understand the building and its functions without going through all of these questions. You hired an expert that you feel comfortable with, they need to be afforded the time to really get to know you, your company, and the “need” so they can develop the best options for you to consider. You may be surprised as to what comes out of the conversations. It may change your thoughts on what the “need” actually is. It is very beneficial that your construction company is an active participant in these meetings. The construction team can offer valuable feedback on the constructability of the solutions presented, how it affects your current structure, impacts on the project schedule and overall budget effects based on the various options.

The Basis of Design

After all of the initial discussions take place, the designer should be gathering all the notes and decisions made during that phase, and assembling this information into one document that becomes the “bible” for the project. This document is sometimes called the basis of design, feasibility report or other names. This document is very dynamic and while it is created during this phase, it should be updated as the project moves forward so each major decision is documented

and noted as to how it affects the project. Each change after this report is issued could impact the budget, schedule and function of the building. It is important to document these changes and insert them as an addendum at the end of this document so everyone understands and remembers what changed and why.

The basis of design or feasibility report will include:

- Floor plans;
- Site plans;
- Preliminary elevations;
- Basic finish information;
- Construction materials for the shell;
- Permitting agencies;
- Timelines;
- Estimated costs;
- Utility company information;
- Associated fees;
- Requirements for zoning or land use;
- Scope of work developed by the contractor that is tied to a budget for the project identifying exactly what the budget is based on including quantities;
- Project schedule from start of design through construction should be included as well so everyone is in agreement on the total project timeline; and
- A list of known project risks and exclusions.

As you can see, this document is full of very valuable information that takes a lot of time to gather and pull together. However, this report sets the stage for the entire project. It will allow the owner to see how well the designer understands the project and all the various pieces that are integrated into the project, the permitting process and the local requirements. The basis of design or feasibility report provides the owner with a detailed budget and scope so they can identify deficiencies or missing items that need to be factored into the budget early on. The owner can also use this for operations planning based on their resources and when they will be needed.

All too many times, the owner wants to kick off the design process without understanding all of these variables in order to save time and money. Proceeding this way is risky, at the least, and opens the



Figure 3: Bringing all of the pieces together.

owner up to change orders, additional costs due to unknown scope(s), timelines that exceed their internal goals and many other issues. In the long run, this approach rarely saves the owner any time or money. As a company, we have decided that we will issue reports like this for all projects. Generating this document not only helps the owner, but it also helps us really understand the project internally. Jumping into design without a comprehensive understanding of the project is just as risky for us as it is for the owner.

An Essential Process

The planning of the project is essential to opening the lines of communication and preparing for the design phase so it can run smoothly. It reduces the amount of time the owner needs to spend during the design phase because the scope is pretty well set early on. It also shortens the timeframe for design because it is already started and a fair amount of decisions are already made. There should be very few unknowns after this phase, which reduces the owner's risk going forward. These are just a few of the advantages of proper initial phase planning for a project. I hope I have shared enough to show you just how important this phase is to the success of your next project. | **WA**

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