

Cost Estimates for Assessment/Master Planning/Design Planning

I had very productive conversations with school district officials and industry professionals to help bring some clarity and understanding to the phases of the type of project we are studying, as well as the way the phases can be bundled.

Process

First of all, the process we are looking at is broken into three general buckets: Assessment, Master Planning, and Referendum/Construction Planning. It is estimated that the cost estimate for this work is in the neighborhood of \$175,000. However, because of the way architectural firms bundle these services, districts seldom realize such costs. This has forced K-12 Architectural firms to approach the bundling of these services and the contracts related to these bundles carefully, in order to not place the firm in the path of unnecessary risk.

Generally, the assessment phase is done prior to a great deal of engagement. The purpose is to gain a comprehensive understanding of the condition of the facilities and the potential for renovation, remodeling, repurposing, expansion, etc. This phase is typically followed by an extensive report of the state of the district. The detail of the report allows for the district to move into the master-planning phase with an “eyes wide open” approach, as well as provide some communication pieces to the district to build a strong advocacy group. In a district our size, we can assume this phase, as a stand-alone process, would cost the district \$40,000 - \$50,000. Generally, you can expect this phase to take 3-4 months, depending on the condition and age of the facilities.

The master-planning phase takes the information gleaned from the assessment phase, and builds a plan that addresses the needs of the facilities and the desires of the district for those facilities. This is a high engagement phase. Typically, over an 8-month period, a chosen firm would lead a multitude of listening sessions, questionnaires, electronic surveys, etc. to assess the questions and directives of all stakeholders in the district. The goal is the development and prioritization of a single to multi-phase plan to address the desired improvements to the district facilities. This phase also likely will give the stakeholders options for the future, and assist in developing the next phase: Pre-Referendum/Post-Referendum planning. Generally, you can expect the cost of this stand-alone phase to cost between \$30,000-\$40,000.

The referendum-planning phase would use the master plan to engage the community in a successful referendum campaign. Listening sessions, publications, renderings, press releases are coordinated through key district stakeholders and the firm consultants are all components of this phase. Depending on the success of the referendum, this phase may need to be retooled and repeated. Generally, a district would expect this phase to cost between \$10,000-\$20,000.

Bundling

District will bundle these phases depending on the climate in the district with regards to referendum support. Depending on the bundling, the costs could differ as much as \$30,000-\$40,000.

If there is questionable support for the referendum process, districts will typically move through each phase one phase at a time. The benefit of this is the district is not committed to one firm, and has the opportunity to submit an RFP at each phase. The downside is the cost is higher, it often takes longer, which risks district apathy between phases, and special attention needs to be given to make sure details are not lost if firms change. Finally, when choosing firms, the district should be aware that not all firms provide all services. A firm chosen to do the initial assessment may not be able to provide the second and third phase of the process.

In districts where there is confidence in the support of a referendum, districts may engage an architectural/design firm the lead all three phases consecutively. The benefits are simple. If a firm has a commitment on all three phases, they reduce their costs substantially. There is a more natural flow between phases, less district apathy, no time lost developing RFP's and interviewing firms, and little chance of any lost detail. The downside is that the district is committing to a firm. If during one of the phases, confidence is lost, it would mean breaking a contract and eating the associated costs.

Districts have also done single assessment phase and bundled the master planning and pre/post referendum. Typically, districts that do this enter the assessment with questionable referendum support, but during the assessment and post assessment reporting, find favorable referendum support. The benefits to that of the three phase, full engagement discussed in the previous paragraph, although it does take more time, and the cost savings is not as much as the three phase commitment.

I did receive an offer from a consultant that I have worked with in my two previous districts. Kit Daley works for Epstein Uhen Architects, and has great knowledge of the phases discussed, knows how schools have bundled these phases and would be willing to meet with us to help us understand the phases. While EUA would be a potential bidder for one or all processes, Kit regularly speaks about these processes at WASB and WASBO conferences, and is very careful to educate without selling EUA.

Stories

Sun Prairie
Menasha
Oconomowoc