

Planning for a construction project can be a very difficult task. Each project is unique and there are many considerations, questions and requirements that must be understood in the early stages of a project. There are several obstacles that can throw a project off course which is why we created this planning guide to help our client's stay on track. Our core belief is that transparency and effective communication is critical to the overall success of the project.

Questions

Below is a list of questions that need to be answered during the preliminary stages of the project planning. Please keep in mind that not all these questions may apply to your specific project and there may also be additional questions required that are not listed below. We understand that you probably can't answer all these questions which is why we are here to help guide you thru the process and understand what will be required to get your project underway.

1. What is the overall project budget?

- a. Will project be financed thru third party lender?
 - i. If so, what additional requirements will the lender impose? (i.e. Builder's Risk Policy, Performance Bonds, etc.)
- b. Does budget include design fees, land survey (if required), permit/impact fees, geotech (soil) testing, land improvements, utilities, building construction costs, equipment and furniture costs, etc?
- c. Larger projects may also require environmental impact studies, traffic studies, special insurance requirements, legal fees, etc.

2. What is the desired project completion date?

- a. Does schedule factor in time for design development, permit review, site improvements and building construction?
- b. Does schedule factor in weather delays?

3. Does the proposed building meet zoning requirements?

- a. What is the zoning classification for the property?
- b. Are there deed restrictions?
- c. Is proposed building use allowed in the property's zoning classification?
- d. Is a separate site plan review required?
- e. What are the zoning setbacks, FAR (Floor Area Ratio to Property Size) and green space requirements?

4. Does client have a current boundary or topo survey?

- a. Is there a Geotech report showing the soil characteristics?
- b. Are there any easements on the property?



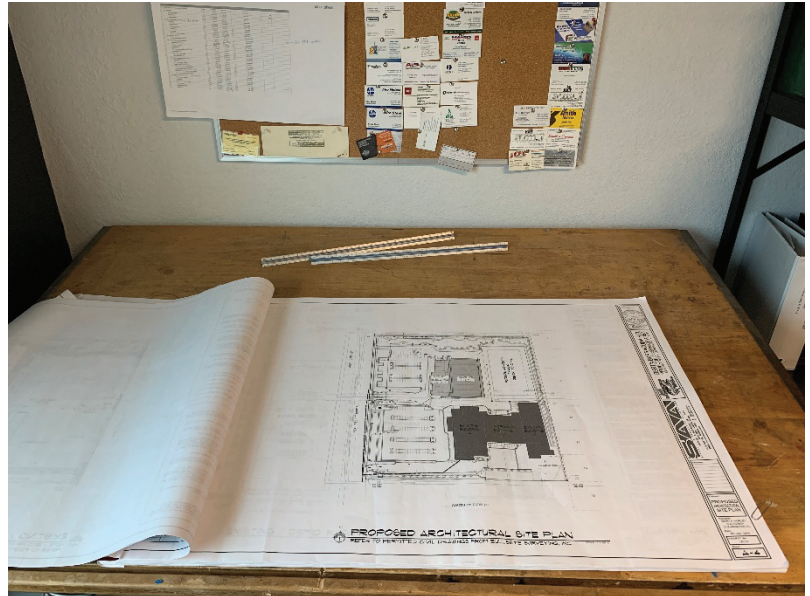
Questions (cont)

5. **What site improvements will be required per the land development code?**
 - a. How many parking spaces will be required?
 - b. How much green space/landscaping/irrigation will be required?
 - c. Will on site retention pond be required?
6. **What are the project scope requirements?**
 - a. Building Geometry- Width x Length x Height?
 - b. Preferred construction type? Materials?
 - c. Interior Build Out Requirements? Room Layout? Conditioned Spaces?
 - d. Clearance Requirements? Door locations? Windows? Canopies?
 - e. Create responsibility matrix- Identifies scope responsibilities. Will client furnish/install any items?
 - f. Specialty Equipment? Specs?
 - g. Power requirements? Gas? Sanitary? Septic?
 - h. Fire Sprinkler? Fire Alarm? Elevator?
 - i. Exterior Signage? Parking Lot Lighting?
7. **What type of insurance will be needed during construction?**
 - a. Builder's Risk Policy? Payment and Performance Bond?
 - b. General Liability Policy (typically covered by the GC)?



Typical Pre-Construction Workflow Process

- Client meets with an architect or design-build contractor to discuss a potential project.
- Architect or design-build contractor prepares a schematic drawing for client review.
- Architect or design-build contractor submits a proposal for design services and a preliminary budget for construction costs.
- Client signs design services contract and releases design team to begin development of the permit documents. During the design-development phase, we recommend engagement of the contractor to review progress drawings and assist design team with value engineering.
- Prior to permit submittal, design team prepares a “pricing set” that can be issued for competitive bidding. If client is working with design-build contractor, the contractor will distribute the pricing set to multiple subcontractors for pricing. If client is working with architect, the architect will distribute pricing set to multiple GC's for pricing.
- If site plan review is required, civil engineer prepares site development package that may include site demolition plan, overall site plan, grading & drainage plan, paving details, landscaping/irrigation plan and misc. site detail sheets. These drawings may have to be submitted to multiple agencies depending upon the different site permits required for the project.
- Architect and consulting engineers prepare building permit package that typically includes architectural drawings, structural engineering, mechanical (HVAC) sheets, electrical sheets, plumbing sheets and fire sprinkler drawings (if required).
- Plans are submitted to the appropriate departments for review. Plan review durations vary greatly by jurisdiction and current department backlogs. Most commercial plan reviews will have at least one round of plan review comments and resubmittal.
- Under ideal circumstances, the client will execute construction contract before or during plan review. This allows the contractor and subcontractor to go thru the submittal process with design team and order long lead items to avoid schedule delays during the construction phase.
- Permits are approved. Construction phase commences.





PRE-CONSTRUCTION PLANNING GUIDE

Typical Construction Project Budget Items

Land Acquisition Costs	Land Purchase, Survey, Appraisal, Legal Fees, Finance Costs
Insurance & Taxes	Property Taxes, General Liability, Builder's Risk, Payment and Performance Bond
Design Services	Geotech, Civil Engineer (Site Design), Architect, Structural Engineer and MEPF Engineer
Municipal/Govt Fees	Permit Fees, Impact Fees and Utility (Power, Water, Sewer, Etc) Fees
Site Construction Costs	Clearing, Earthwork, Paving, Curbing, Sidewalks, Site Utilities, Building Pad, Retention Pond, Landscape and Irrigation
Building Construction Costs	Concrete Foundations, Exterior Wall Systems, Roofing, Exterior Windows & Storefronts, Doors & Hardware, Interior Stud Wall Assemblies, Acoustical Ceilings, Flooring, Cabinetry & Countertops, Painting & Waterproofing, HVAC Systems, Plumbing Fixtures & Piping, Electrical Systems, Fire Sprinkler, Fire Alarm
Owner Furnished Items	Furniture, Equipment, Etc. This budget line item is project specific.