

WINNING STRATEGIES

The Master Plan Passed. Now What!

The Owners Design and Review Responsibilities

O.K! We did everything right. The members have just passed a comprehensive master plan for expansion of the clubhouse. The process was well thought out and effectively addressed the club's expansion and aesthetics concerns. Even more important is that the plan corrects functionality issues that have plagued us for years. We did most everything right to insure success including:

1. We put together a team of top club consultants and design professionals that could deal effectively with:

- § expansion issues,
- § architectural integrity,
- § member involvement using focus groups,
- § finance plan development,
- § the use of quality marketing materials and
- § generating member consensus

2. We insured that the architect and interior design team selected for the master plan process were also the ones that were best equipped to see the project through.

3. We were prudent financially. Future architectural and interior design fees for the contract documents were bid in advance. If the members passed the project we knew we had competitive fees to proceed with contract documents.

Now we are ready to proceed with design development and then construction. The question becomes what is the most important responsibility of the club (owner) during contract document development?

The Most Important Responsibility of the Club

Obviously the owner must convey program elements, provide operational and aesthetic expectations and associated performance criteria. Certainly architects and interior designers are hired for their professional expertise but don't discount the role of the club. James N. Walter, a construction arbitrator for the American Arbitration Association says, "The club better not sit back and assume that the experts will always deliver function. Don't ignore your own experiences, no matter what expertise is brought to the table by the club planner. During the formulation of the documents challenge all participants to be visionary."

How do architects work? They are trained to use a checklist format. Every part of the job has an associated checklist that they use to insure they have followed correct procedures. It is interesting that during plan development many of the checklists include an item at different stages called 'owner review'.

Unfortunately this is where many projects breakdown. Owners fail to perform this critical function. The main reason is that they are too concerned with the floor plans and some elevations while disregarding the balance of the documents.

What Documents Do You Need to Review?

There are more to the documents than just floor plans. The documents include all the engineering drawings, lighting diagrams, mill work schedules, hardware and much more. Many of these documents have functionality issues included in them. You would not want the planner to arbitrarily locate the phone jacks, computer jacks or power plug needs according to code. Each club will have their own needs based on the operation. Management must be actively involved in these locations. Every single plan sheet included in the large role needs to be reviewed.

Normally, architects will not want you to make major changes late in the process. The more proactive the club can be early, the more positive and cost effective the process will be.

The Document Review Timetable

As mentioned above, the review should actually be part of a sequenced schedule of document development. Each step in the process should be listed with an area for proposed and actual completion dates.

Many times the club has established an expected construction start date that they want to maintain. If the project timetable has been well planned there is normally 2 to 3 weeks at the end of the job for the owner to review the documents for all required changes before the project goes to bid. If the master planning process has taken longer than expected, or the document development timeline is taken longer then what was

scheduled, review time is generally what gets cut. This is a major mistake. It is prudent that a complete review be made by management and club representatives and a minimum of 2 weeks be allotted to complete the process.

Two Last Cautions

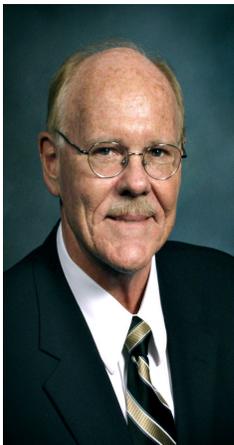
First, remember that the construction industry is an industry based on risk. Walters states, “The industry is full of professionals reading the exact same information and coming to totally different conclusions. Each reader is attempting to read into the documents their own point of view regarding responsibility and risk.” Architects even have liability alerts in their explanations of AIA contracts.

Both the architect and contractor want to insulate themselves from as much risk as possible. It is most important that the club have an expert review the individual contracts for unusual risk issues.

Second, it is critically important that the budget for the project has been well developed. It is amazing how you can go around the country and see so many projects that come in substantially over budget. It is most important to be realistic as to costs. The owner can pinpoint actual costs for many parts of the project. The real budget wide card is general contractor construction costs based on materials, labor and subcontractor issues.

It may hard to believe but today it is common to budget \$350 per square foot or more depending on the area of the country for turn key projects. Right after Katrina hit the gulf coast one project came in at over \$350 for just the construction costs. Get realistic numbers and provide solid contingencies.

For more information on this subject read the MCM Monograph of Jerry McCoy titled “The Value of Contract Documents in Club Construction and Renovation” available through CMAA’s Bookmart.



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