

## STRATEGIC PLANNING – DEFINE WHAT YOU NEED TO BUILD

- Design Programming
- Facility Needs Assessment
- Master Planning
- Conceptual Budgeting & Financial Modeling
- Conceptual Design
- Strategic Plan Follow-Up Audits

When you start a journey to an unfamiliar place, you generally begin by planning the trip with the destination in mind (or at least you should). That plan needs to be more than a physical map, or in the case of facilities, more than a blueprint of what you want. It needs to answer a number of questions such as: Where am I headed (what is our vision)? How much will it cost me to get there (how much should it cost and how do we project into the future our ability to afford it)? How long will it take (how long will it take to deliver facilities and how do I phase a plan to achieve the vision)? And possibly the most difficult question to answer of all, why am I going there and is it worth it (critical evaluation in the planning process that provides an informed position with wisdom and clarity)?

Our Strategic Planning Services help answer these questions. By applying our years of experience in planning facilities, we provide the necessary expertise and insight to model and analyze your needs before drawing begins. Planning is more important than plans at this stage of the process. The results of that modeling are used as the basis for the initial conceptual plans. CCL's Strategic Planning process balances variable such as Needs vs. Wants, Budgets vs. Financial Capacity and Growth vs. Phasing to deliver a studied approach before committing hundreds of thousands of dollars to design (or worse yet millions to build) a project that you can't afford or isn't what you need.

The outcome of our Strategic Planning Services provides much more than simply a master plan. It provides a strategy that incorporates growth projection analyses, detailed analyses and modeling of space requirements, financial models of budgets and debt, master plan concepts with phasing strategies that match your financial capacities and graphic presentation materials to communicate the vision of the journey you are about to embark upon.

## PROJECT DEVELOPMENT – DEVELOP A FRAMEWORK TO BUILD IT

- Manage/Negotiate Property Purchase & Sale
- Due Diligence Studies
- Obtain Property Entitlements & Permits
- Assemble Project Team
- Manage Compatibility of Design, Budget & Vision
- Secure Project Funding

Once a Strategic Plan has been developed, and prior to setting out on the road, there are many things that need to be prepared. Whether you're buying property or expanding on your current site, often times you need to acquire and/or sell land, obtain different zoning, acquire property entitlements from federal, state and local authorities (special use permits, environmental permits, storm-water permits, etc.). These are in addition to and come far in advance of building permits, DOT permits and other plan-related permits. To accomplish this, you must integrate preliminary design and budgeting with the partners of the Architect and Contractor in order to make informed decisions as to the direction of the project.

With our Real Estate Brokerage background, our Project Development Services help you select the right team for your project by soliciting the market for competitive proposals and leading interviews with the many candidates (e.g., Local Brokers, Land Use Attorneys, Civil Engineers, Architects, Contractors, etc.). We work closely in managing the team of professionals to further define the design while aligning the budget and leading the process to obtain necessary entitlements. As the project moves towards design completion and subsequent contracting for building services, CCL facilitates the

project funding by acting as the liaison with financial partners and analyzing financing options to secure a lending package.

This service organizes all of the many efforts required to set the table for a successful building project. There are many things in moving a project to construction beyond hiring an architect and contractor and that fall outside of what those agents will perform. It requires an experienced person on the Owner's behalf to lead the development process as it has significant implications to the ultimate success of your project.

## PROJECT MANAGEMENT – DELIVER YOUR VISION SUCCESSFULLY

- Negotiate Contracts with Project Team & Procure Owner Furnished Items
- Construction Phase Advocate
- Conflict Avoidance & Resolution
- Responsible for Day to Day Communication & Project Reporting
- Manage Project Budget, Cost & Schedule
- Manage Project Closeout & Warranty Follow-Up

When you are ready to embark on the journey and the plan has been fully tested and verified through our lens and filters, it is time to get on the road. To make this well-planned journey a success, there needs to be a qualified person with the time and experience to lead the project as an advocate to navigate on behalf of the Owner. Negotiating contracts with vendors, contractors, and design professionals; procuring Owner-furnished items (A/V equipment, furniture, other misc. FF&E); managing the budget, schedule and day-to-day communications; these are all part of the many necessary logistics that determine a project's success. There are thousands of components and hundreds of people in a typical project that requires experienced leadership to implement to completion.

CCL's Project Management Services provides you the leadership to allow the Owner to focus on its day-to-day business. Utilizing the experience of our people, CCL will negotiate clearly-defined agreements, continually manage the design through the lens of the Owner's budget while seeking cost-saving alternatives, establish protocols and project-reporting controls to manage the schedule and budget, establish day-to-day communications for issue resolution and conflict avoidance, and clearly communicate the project's progress so the Owner is able to make informed decisions along the way. As construction comes to a close, we work with you in coordinating move-in details and follow-through on all contract close-out issues and warranty items.

The construction process is a risk-laden and complex one that requires focused management and leadership to maintain Owner control. CCL's Project Management Services provides just that. By essentially becoming an extension of your staff, we apply our time and expertise to ensure a successfully delivered project.