United States Courthouse Annex, Wheeling WV
Architect: Goody, Clancy & Associates

Pre-Planning Phase

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Overview of the Pre-Planning Phase

The Pre-Planning phase highlights the importance of day-to-day facilities management in shaping a successful Capital Program, especially the evaluation of alternatives. From its daily operations, GSA knows the community inventory, the market conditions, and the customer's business needs (see Exhibit 3.1).

During this phase, GSA develops the contextual understanding of its inventory, an intimate knowledge of its facilities, supportive budgets, and solid relationships with stakeholders. These activities enable GSA to identify potential projects, alternative solutions, and implementation strategies.

Recommended Activities

1. *Know the customer and their business objectives*
   Assess the customer's present and future needs, as well as changing work processes. Collaborate with community stakeholders about issues of common interest. Know community plans and develop local contacts. Maintain ongoing communications with the customer and community stakeholders.
2. *Understand the asset*
   Complete LPPs and ABPs; facilities studies (including BERs, BPPs, seismic studies); various small renovation projects (BA54); and lease acquisition studies (including market studies).
3. *Compare the customer's requirements to the portfolio capability and capacity*
   Define the gaps between the customer's needs and the portfolio's supply and determine potential solutions.
4. *Create a budget (BA61)*
   Include all of the studies needed to support the Capital Program (e.g., those cited above), as well as the Feasibility Study and PDS.

Outcomes

- Familiarity with GSA portfolio and customer facility program
- Close working relationships with the customer agency and local community
- Pre-planning viewpoint integrated into day-to-day operations
- Background information (or supporting documents) to inform future decisions

Duration

These tasks are ongoing during normal GSA facility management operations.

Understanding Building Conditions

Ongoing renovations and repair projects, like this restroom upgrade, reveal the condition of the building systems, the presence of asbestos, and other conditions that come into play during the Feasibility Study and the PDS. During the early stages of the Feasibility Study, it is essential that the planning team understand the magnitude and complexity of hazardous materials. Invasive investigations are the most effective way to do this.

Exhibit 3.1: Keys to Pre-Planning Phase Success

Know the Customer's Programs
Customer needs drive and influence every project. Know the customer's long-range plans; likelihood of short-term expansion or contraction; and special needs and concerns. All of these factors come into play during the project development phase. The sooner the familiarity with customer programs is understood and incorporated, the more solid the foundation for project development. GSA's Workplace 20-20 Program can help make the workplace a strategic tool to meet business objectives.

Develop Sound Asset Strategies
Meaningful Feasibility Studies and PDSs must be conducted within a valid context and assessment of the facility. Local Portfolio Plans (LPPs) and Asset Business Plans (ABPs) are the key tools to develop and understand that context over time.

Emphasize Solid Working Relationships With Both the Customer and Community Stakeholders
Good working relationships developed over the course of several years are the most valuable asset to bring into the project development process. GSA Property Managers, Realty Specialists, and others are important ambassadors to various stakeholders. This is especially significant when projects become controversial or dependent on community actions and approvals.

Develop Budgets to Support Capital Planning
The cost of Feasibility Studies and PDSs represent significant investments by GSA. High-quality studies require that sufficient funds (BA61) be set aside and available at the right time. Inadequate planning budgets will not produce high-quality results.