Community Facility Planning Workbook

A User-Friendly Guide to Planning Community Facilities

June 2005

Developed by Agnew::Beck Consulting, LLC
Photo Credit: Agnew::Beck

Top: Ikalikurvik Family Resource Center, Togiak
Middle: Children participating in a community workshop, Manokotak
Bottom: Historic Recreation Hall, Kennicott
OVERVIEW

This workbook is for use by community residents and organizations planning to develop a new community facility. The goal of this process is to plan a facility that is right-sized to accommodate community uses and a sustainable operation. This process emphasizes combining multiple uses within one facility and leveraging multiple funding sources for the design and construction phases of development.

By completing this workbook, you are completing the major elements of a competitive funding proposal or business plan for your facility. This is the first step towards creating a facility that is a blessing to your community without placing an added burden on already stretched resources.

Before getting started, discuss with your planning committee the following questions:

Questions to be answered before developing a Community Facility:

- Overall fit with community priorities – is this facility a top priority?
- Planning – who will serve on a committee to lead the planning effort?
- Coordination – how will the facility be used?
- Build new vs. renovate existing facilities?
- Building costs – how much, what sources of funding?
- Sustainability – how much will it cost to operate, how to pay?
- Feasibility – is facility really needed, really affordable?
- Leadership - who will operate the building, pay the bills?
PLANNING PROCESS

Getting Started
1. Form Planning Committee

Project Scoping
2. Set goals for facility
3. Define context: what related community projects are in progress?
4. Prepare facility concept sketch (and construction budget)
5. Prepare operations costs concept sketch
6. Preliminary conclusions: judge feasibility and refine goals

Site/Existing Building Selection
7. Review options - build new or renovate?
8. Evaluate specific sites/buildings
9. If needed: establish site control, conduct environmental assessment

Project Development - Business Plan
10. Refine building design
11. Refine capital budget
12. Refine operations budget
13. Clarify Governance - who will own/operate facility?
14. Final feasibility assessment - is project sustainable?
15. Develop fundraising strategy
16. Develop and submit funding applications

Project Implementation (Arch & Eng)
Final building design
Final operations & capital budgets
Construction planning
Construction
## GETTING STARTED

### I. Form Committee

- List people who need to be involved in project from your village and from outside
- Make note of who will take on specific roles (for example taking meeting notes, scheduling meetings, reporting to village council, working with architects, etc.)

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<td>ROLE IN PROJECT</td>
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<th>OUTSIDE VILLAGE</th>
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<td>ROLE IN PROJECT</td>
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</tbody>
</table>

c. Resources: list community plans or reports completed or in progress that will assist the community facility planning effort. Also, list strategic plans completed or in process for community organizations.

<table>
<thead>
<tr>
<th>Name of Plan</th>
<th>Who has a copy?</th>
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d. Compile other documents necessary to complete conceptual planning process:

- Aerial photo of village
- Budget information from potential tenants to assess ability to pay for lease and utilities
- Square footage of current office and multi-purpose spaces
- Rough estimate of construction cost ($ per square foot) for other recently built facilities in your village
- Rough estimate of operating cost ($ per square foot per year) for other comparable facilities in your village
2. Set Goals & Vision
   a. List three **goals** for the new community facility that describe how the facility will improve service delivery or community life.
      1. _________________________________________________________________
      2. _________________________________________________________________
      3. _________________________________________________________________
   b. Describe, in just a few words, your **vision** for your new facility. What will the atmosphere be like? What will it look like? What words describe it? Jot down phrases and words – don’t worry about completing a statement at this stage.
      _____________________________
      _____________________________
      _____________________________
      _____________________________

Remember to circulate goals & vision to others not present for feedback.

3. Context –Community Priorities
   a. List other projects in progress in the community

<table>
<thead>
<tr>
<th>PROJECT</th>
<th>STATUS</th>
<th>RELATIONSHIP TO THIS PROJECT (if any)</th>
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<tbody>
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</table>
b. Using existing community & regional plans and/or a simplified community planning process, identify community’s **five highest priority issues** (for example, economic development, housing, education, cultural programs, etc.).

1. ____________________________________________________________________________
2. ____________________________________________________________________________
3. ____________________________________________________________________________
4. ____________________________________________________________________________
5. ____________________________________________________________________________

c. Is improving this facility a priority for your village at this time?

d. Later: Develop a resolution for village organizations to sign in support of this facility in your village.

4. **Inventory current services that will be housed in the new facility**

   **[IF YOU ARE PLANNING FOR ONLY ONE USER (TENANT), SKIP QUESTION 4 AND CONTINUE TO QUESTION 5]**

   a. Use table on page 8 to list existing services and office locations of potential tenants. *Remember to survey those not present to assess their needs.*

   b. Use an aerial photo of your village to map existing community facilities and current locations of potential tenants. *See example on page 9.*
**List potential uses or tenants. Identify space needs, qualities & potential for shared spaces.**

<table>
<thead>
<tr>
<th>SPACE NEEDS</th>
<th>SPACE QUALITIES</th>
<th>SHARED SERVICE NEEDS</th>
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</thead>
<tbody>
<tr>
<td>Office Space</td>
<td>Meeting Space</td>
<td>Receptionist</td>
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<td>Multi-purpose area</td>
<td>Storage</td>
<td>Internet</td>
</tr>
<tr>
<td>Kitchen</td>
<td>Computer lab</td>
<td>Fax</td>
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<tr>
<td>Activity Room</td>
<td>Dining room</td>
<td>Copier</td>
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<tr>
<td>Bedroom</td>
<td>Quiet</td>
<td>Audio conference</td>
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<td>Noisy</td>
<td>Confidential</td>
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<tr>
<td>Separate entry</td>
<td>Ground floor access</td>
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<tr>
<td>Separate from office space</td>
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</table>

**Potential Uses/ Tenants**
Arts & Crafts Center
Tenants:
Youth Prevention Activities – 1 person
Suicide Prevention Specialist – 1
Gift Shop & Cultural tourism - 1

Senior Center
Tenants:
Tribal Children's Service Worker - 1 person
Tribal Admin - 2
BBEDC Peer Worker - 1
Family Service Worker - 1
Drug & Alcohol Counselor - 1
Natural Helpers - 2

Tribal Children's Service Worker - 1
Tribal Admin - 2
BBEDC Peer Worker - 1
Family Service Worker - 1
Drug & Alcohol Counselor - 1
Natural Helpers - 2

Post Office
Health Clinic;
Dental Clinic & Lodging

Head Start
Family Advocate - 1 (plus other on-site staff)

Powe

Teen Center
Youth Opportunity Specialist - 1

School
Senior Service Coordinator - 1
Elderly Nutrition Site Manager - 1

EXAMPLE

Inventory existing location of services to be provided in new facility

Map:
- Potential tenants & number of workers
- Location of current office space
- Other important community facilities
5. Inventory future needs

Use space needs worksheet prepared above to complete the following.

a. In the first column, list tenants (if your facility combines multiple users) or space use (e.g. administrative office, storage, laundry, etc.); then list space requirements for each use or tenant.

<table>
<thead>
<tr>
<th>Estimated Square Footage, Revenues &amp; Expense by Use/ Tenant</th>
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<tbody>
<tr>
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<td>ESTIMATED SQAURE FEET</td>
<td>ESTIMATED ANNUAL OPERATING COST</td>
<td>ANNUAL LEASE REVENUES</td>
<td>SURPLUS OR (DEFICIT)</td>
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<td>LOCAL CASH MATCH</td>
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a. Roughly estimate construction cost by totaling square footage and multiplying by the estimated dollar per square foot construction costs for your village.
b. Estimate local match required for construction by multiplying cost estimate by 20%.
c. Brainstorm with group sources for local match such as land, other grants, city or tribal funds.
d. Sketch a preliminary concept design for facility see diagram on page 12 for example. Use information recorded above to sketch tenant requirements
Community Facility
CONCEPT DESIGN

4 offices @ 150 sf
each = 600 sf

Confidential Service Providers Offices
(Separate entry)

Small conference room = 400 sf

Multi-purpose space = 1000 sf

Common Reception Area
Shared Receptionist/ Manager

Shared Office
Equipment

Bldg Services
Restrooms

Service Providers Offices

6 offices @ 150 sf each = 900 sf

Lodging

Lodging: 5 rooms @ 250 sf = 1250 sf

ESTIMATED SQUARE FOOTAGE = 4,150 SF
5. OPERATIONS COSTS CONCEPT SKETCH

a. If your facility will have multiple tenants, each making lease payments towards the operating costs of the facility, list each tenant here and identify the operations costs and expected revenues for the square footage they will occupy (in the table on the following page).

b. If your facility has only one tenant, enter the total square footage for the facility to estimate operations costs OR if you have multiple funding streams supporting different aspects of your program, identify these and how much each will contribute to the operations costs of the facility (in the table on the following page).
<table>
<thead>
<tr>
<th>Potential Uses / Tenants</th>
<th>ESTIMATED SQUARE FEET</th>
<th>ESTIMATED ANNUAL OPERATING COSTS</th>
<th>ANNUAL LEASE REVENUES</th>
<th>SURPLUS OR (DEFICIT)</th>
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NET EST'D SQUARE FEET 0 $ - $ - $ -
x 20% for circulation 0 $ -
GROSS EST'D SQUARE FEET 0 $ - $ -
X $175/ SF x 175
COST $ -
X 20% x 20%
LOCAL CASH MATCH $ -

c. Enter operations costs into concept design sketch. See the example on page 15.
Community Facility
CONCEPT DESIGN PLUS OPERATIONS COSTS

4 offices @ 150 sf each = 600 sf
Est'd ops cost = $6,000

Small conference room = 400 sf
Est'd ops cost = $4,000

Multi-purpose space = 1000 sf
Est'd ops cost = $10,000

6 offices @ 150 sf each = 900 sf
Est'd ops cost = $9,000

ESTIMATED TOTAL = 4,150 SF
ESTIMATED OPERATIONS COST/YR = (SF x $10/SF per year) = $41,500
7. Preliminary Conclusions: Judge Feasibility & Refine Goals

As a group:

a. Review estimated total square footage for facility, estimated operations costs, expected revenues, and estimated funding surplus or deficit.

b. Brainstorm other sources of funding that will cover deficits (if any).

c. Adjust concept sketch as needed by reducing size and/or number of office spaces, reducing size of shared spaces, and considering other tenants that could help defray costs (for example, post office, washeteria, clinic, etc.)

d. Remember to consider what will become of existing facilities if your services move to a new location – will existing facilities be able to operate? Adjust your program to ensure that other facilities do not suffer as a result of creating the new community facility.

e. Evaluate what scope of project is feasible for your village and evaluate if this facility will meet your needs.

f. Once a feasible scope has been agreed upon by the group move on to next step: site evaluation & selection.
SITE EVALUATION & SELECTION

8. Review Options: Build or Renovate
   a. List below the five most important criteria for evaluating potential sites for the new community facility (for example, central location, site control, close to utility hook-ups etc.)
      1. ________________________________________________________
      2. ________________________________________________________
      3. ________________________________________________________
      4. ________________________________________________________
      5. ________________________________________________________
   
b. Use aerial photo to map potential sites for facility. Include both existing buildings, and possible sites. See example on page 18.
Arts & Crafts Center
Tenants:
Youth Prevention Activities – 1 person
Suicide Prevention Specialist – 1
Gift Shop & Cultural tourism - 1

Senior Center
Tenants:
Tribal Children’s Service Worker -1 person
Tribal Admin - 2
BBEDC Peer Worker - 1
Family Service Worker - 1
Drug & Alcohol Counselor - 1
Natural Helpers - 2

Tribal Children’s Service Worker -1 person
Tribal Admin - 2
BBEDC Peer Worker - 1
Family Service Worker - 1
Drug & Alcohol Counselor - 1
Natural Helpers - 2

Post Office
Health Clinic;
Dental Clinic & Lodging

Future Community Facility Site #1
Future Community Facility Site #2
Future Community Facility Site #3

EXAMPLE

Add Potential Sites for Community Facility
Map:
- Potential sites
- Existing buildings available for renovation
- Location of other facilities that will share services or clients with new facility
c. Use table below to evaluate potential sites for construction and/or buildings for renovation. See following example.

<table>
<thead>
<tr>
<th></th>
<th>Site #1 – Across from Post Office</th>
<th>Site #2 – by old school</th>
<th>Site #3 – renovate old warehouse</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Close to clients</strong></td>
<td>Best</td>
<td>Good</td>
<td>Good</td>
</tr>
<tr>
<td><strong>Cost to construct/renovate</strong></td>
<td>Min $300/ sf</td>
<td>Min $300/ sf</td>
<td>$150/ sf</td>
</tr>
<tr>
<td><strong>Site size compared to desired SF</strong></td>
<td>OK</td>
<td>Small</td>
<td>OK</td>
</tr>
<tr>
<td><strong>Cost to operate</strong></td>
<td>$41,500</td>
<td>$41,500</td>
<td>$41,500</td>
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<tr>
<td><strong>Site development</strong></td>
<td>Some</td>
<td>Some</td>
<td>None</td>
</tr>
<tr>
<td><strong>Electricity</strong></td>
<td>Y</td>
<td>Y</td>
<td>No</td>
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<tr>
<td><strong>Water/Sewer</strong></td>
<td>Y</td>
<td>Y</td>
<td>No</td>
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<tr>
<td><strong>Timing</strong></td>
<td>3-4 yrs</td>
<td>3-4 yrs</td>
<td>1-2 yrs</td>
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<tr>
<td><strong>Chance of successful fundraising</strong></td>
<td>Community match 10-20% of total cost</td>
<td>Community match 10-20% of total cost</td>
<td>Community match already secured by land &amp; building</td>
</tr>
<tr>
<td><strong>Site Control issues</strong></td>
<td>Need conveyance from village corp.</td>
<td>Purchase from private owner.</td>
<td>None -- In city control already.</td>
</tr>
</tbody>
</table>
Your Turn – List site evaluation criteria from page 17 in left column, and potential sites identified on page 18 along top row.

<table>
<thead>
<tr>
<th>Criteria 1:</th>
<th>Site #1</th>
<th>Site #2</th>
<th>Site #3</th>
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<td>Criteria 2:</td>
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<td>Criteria 5:</td>
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9. Evaluate specific sites/buildings and make final selection

As a group:

a. Based on the criteria established by the group, and the comparison of possible sites and existing facilities, discuss which site will best meet the needs of the community facility.

b. Meet with village and city councils and village corporation board members, as needed, to finalize site selection and begin to establish site control (if needed).
c. Draft and pass resolution and/or Memoranda of Agreement regarding conveyance or lease of site for the new community facility.

10. Establish site control, conduct environmental assessment (If needed)

PROJECT DEVELOPMENT – BUSINESS PLAN

Once the planning committee and governing bodies have agreed on a concept design, facility program, and potential site for facility AND have determined the preliminary feasibility of the project, the committee should work with a qualified architectural and/or engineering firm to produce preliminary drawings and cost estimates for the facility.

11. Refine building design

12. Refine capital budget

13. Refine operations budget

14. Clarify Governance – who will own/operate facility?

★★ 15. Final feasibility assessment – is project sustainable?

Once these preliminary documents are produced, the planning committee and governing bodies should make a final judgment on the feasibility and sustainability of the project.

16. Develop fundraising strategy

Designated members of the planning committee should select funding sources and evaluate funding criteria to ensure all required information is compiled. Application deadlines and schedule of funding cycles need to be coordinated with design and construction schedule.

17. Develop & submit funding applications

PROJECT IMPLEMENTATION

Each community will contract with qualified architectural, engineering and construction management firms to complete final design and construction documents and complete construction.