

The Community Builder

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3 Tips For Restarting The Budget Cycle

Beth Penfield, LEED AP BD+C, ALEP

B&D's Beth Penfield has advised clients navigating the capital budget process for over ten years, contributing to over \$25B worth of project plans. We asked her to provide tips for restarting the budget cycle.



Penfield: Happy September, all! As summer comes to a close it can mean only one thing... the start of budget season!

To start—congratulations to those who recently opened new schools and wrapped up the blitz of summer projects. To help you collect your thoughts on those projects and move on to the *next* round, here are some tips about how I approach informing the budgeting process all year round.

First – get the story of each project on paper during your planning efforts

- I like to say we “build” a project three times—once with words, once with pictures, once with bricks & mortar. During planning, get the project’s concept on paper within a deliverable like an Educational Specification or Project Charter.
- Make the implicit explicit. It will go a long way to ensuring expectations get managed from the start—Why is the project needed? What are the key assumptions? What are the risks?
- Use the same format for each to make it easier to pick back up a project and refresh its assumptions.

Second – determine how and what can you learn from the most recent projects

- Your project managers are a wealth of knowledge. Learning from them how key budget assumptions evolved over time will inform your next project’s assumptions.
- Initiate a process to track a project’s budget. At closeout, compare the “as-built” budget to the original budget assumptions.
- If the PM knows you need certain information in the end, it can be logged along

the way to support this process. It is MUCH harder and time consuming to work backward after a project is complete.

- Perform post-occupancy reviews of your projects to capture lessons learned to improve your space programs and design standards. Include them as part of your contractual requirements of your project team so that they are required to help you capture these stories.

Third – refresh and right-size your “legacy” project budget models

- I have seen many “legacy” projects get pushed back into the budget request process where the assumptions are taken as hard fact from when their budgets were first modeled.
- The key word here is “modeled”—budgets attempt to model a reality of how you will eventually commit funds for different hard and soft costs. Realities change and thus you need to recalibrate your budgets each year:
- Have square footage assumptions for particular uses changed (maybe even been reduced)?
 - What codes or requirements have changed?
 - What lessons learned can help better this project?
 - What was the original assumption for escalation?

Finally, ask yourself carefully about the level of stakeholder and community input received to date and what will be needed to confirm your scope, schedule, and budget for projects. If you have not had time yet to fully engage, step back and forecast what baseline items may shift after those discussions begin. Ensure you have the right contingencies in place to mitigate against those unknowns.

Good luck!

Back To The Future

Blending a historical past with a contemporary future

Burt Jackson, AIA, CMAA, CSI, CDT

August 26, 2019, was the first day of school at Hyde-Addison Elementary. Not only was it the first day for teachers and administrators, but it was also the first day that the previously detached school buildings at this location became one campus in the Georgetown section of Washington, DC. Excited children and parents walked wide-eyed into the new courtyard of the campus, taking in the strikingly contemporary building—and its representation of over 120 years of continued education and enlightenment for young people living in the community.



What is now observed as a sleek and contemporary educational campus was once two separate, but adjacent schools on two separate streets. As the area’s academic population grew in the late 1920s, the school system combined the two buildings. The following years saw ample change: one side facing closure in 1944 for being in poor physical condition, the closed side being deemed significantly obsolete, and desegregation in the 1960s drawing more students. Throughout, the functionality of the buildings became increasingly problematic.

As a part of B&D’s ongoing partnership with DC Public Schools (DCPS) and the DC Department of General Services (DGS), both the Hyde and Addison schools underwent modernizations in recent years. The most recent phase of the project re-combined the two schools (40,000 square feet total) and added 30,000 more square feet of space to create the **Hyde-Addison Elementary School**. The \$47M project answered the need for

more capacity in the face of a growing population. B&D led architectural and programmatic studies, composed a new campus vision for Hyde-Addison Elementary School, and helped select the design-build team (Shinberg Levinas Architects and MCN Build, Inc.).

The project was all about creating more room for education. The team was able to reprogram space previously used for administrative offices and utilities / mechanical systems, turning it into classrooms (and offering upgraded accommodations for staff). The team also created a new hybrid space that will serve as a gymnasium, cafeteria, and multipurpose room. In short, a *lot* more space was created and found. State-of-the-art features were also installed, such as a Building Automation System to control the HVAC, and smartboards in every classroom. Finally, the project will be LEED Gold–certified!

Hyde-Addison Elementary is now poised to take on the challenges of population growth and new developments in teaching methodologies. Utilizing educational technology in a state-of-the-art building complex, Hyde-Addison is prepared to guide excited young minds into the future.

*B&D has three newsletters (Higher Education, Public Sector, and Venues).
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