"Project Preplanning Best Practices for Educational Facilities: A Case Study."

Abstract: K-12 construction and facility managers face the challenge of delivering more with less. Many educational organizations have very time-sensitive projects that must be completed during the limited summer construction season. This paper seeks to address two requirements owners have in the delivery of construction projects in educational facilities: diversification and selection of suppliers, and the preplanning process by which the suppliers execute the projects. Acquisition of contractors in a public setting must be fair, open, and transparent. This implies that public owners must use a wide-range of different suppliers. Once a supplier has been chosen, the authors propose that owners and design professionals use ‘best practices’ to implement effective project preplanning. These tools include a pre-award clarification meeting with all key stakeholders (owner, design professional, and contractor), documentation of the project execution plan, and clear baseline expectations in terms of cost and schedule. This preplanning phase aligns the critical personnel and resources.

The paper presents a case study of 40 K-12 construction projects completed in Rochester, Minnesota that used a best value selection and contract preplanning structure. The projects were completed over a period of four years, and had fewer than 2% change orders, and no schedule delays. Paradoxically, the owner has continually received high performance on these projects though the number of proposers on each best value project has generally decreased. The major results of this paper are that: (1) the best value structure provides clear and justifiable documentation for owners in spite limited competition and (2) project preplanning empirically reduces changes orders and schedule delays.