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# PLANNING

THE LEXICON OF PLANNING AHEAD

**B**EYOND DEATH (AND TAXES) THERE ARE ABUNDANT GOOD REASONS TO PLAN. Yet, we human beings are not naturally predisposed to planning. The economic benefits of planning ahead ought to be sufficient; however, coupled with staving off many emergencies, avoiding overwhelming operations costs, and being forced to make decisions based on the demands of short-term needs, there are myriad incentives to plan ahead. It's funny how often it is that we don't have enough money to do it right, but we have enough money to do it twice. Planning allows us to look at the big picture, serves as a road map, and facilitates "right-sizing" projects and their components.

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**"If you fail to plan, you are planning to fail."**

—*Benjamin Franklin*

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Planning tools help us fix problems before they get worse, identify problems before they're apparent, and—most beneficial—avoid problems before they take form. Generally, planning helps to properly allocate resources. These may relate to concerns that are financial, logistical, operational, technical or aesthetic. Planning forces us to focus, to reflect, and to arrive at a consensus of goals, needs, and the methods of attaining them, thereby developing projects that address issues at hand; planning saves us from becoming overzealous, responding to knee-jerk reactions, or focusing on the symptoms and not the cause.

Owners, stewards, architects, engineers, and property managers are faced with many types of plans and approaches that set goals, evaluate options, and establish a course of action. Yet, these should be seen as a set of facility management tools, each designed to address a specific objective while incorporating a unique approach. For the professionals regularly engaged in developing plans, the lexicon is clear; however, the array and terminology can quickly become confusing to the casual user. It is important to know the general goals of each plan and the distinctions (often nuanced) among their approach and intended outcome. Here are some commonly used planning documents that should become part of your active vocabulary: master plan, strategic plan, feasibility study, optimization plan, maintenance plan, and green action plan.

**Master plans** encompass physical building programs and related regulatory issues. Generally, they incorporate an assessment of governing codes, conditions, programming, spatial allocation, and use, leading to concepts and recommendations for design, restoration, reuse, and optimization, along with budgets and timelines.

**Strategic plans** focus on specific operational and logistical concerns associated with a physical design and construction project. Generally, they define and clarify long- and short-term facility needs


with an eye toward maintaining some semblance of normalcy and financial stability (e.g., cash flow analysis) throughout construction.

**Feasibility studies** analyze a proposed project to determine whether it is technically, programmatically, and financially viable. Generally, a feasibility study includes a digest of the organizational goals compared with site/building potential; a summary of reasonable alternatives with associated costs; known or predictable impediments, incentives, and opportunities.

**Optimization plans** provide an overview of a facility and its management via life cycle analysis. Often the goal is to reduce operations costs while increasing energy efficiency and long-term performance. A critical component of these plans is "benchmarking," which creates a site-specific standard by which future initiatives may be measured and monitored. Optimization plans are multimodal and proactive, and may be initiated at virtually any point in a building's life, from conceptual design through construction and management. Energy audits are a familiar subcomponent of such plans; to be put into perspective, they require the context of the larger plan.

**Maintenance plans** specify the schedule, type, and frequency of implementing cyclical maintenance of repairs to prolong performance life, enhance self-preservation qualities, and protect building-related investment. When undertaken on a planned and regular basis, maintenance can reduce or prevent building failure and repair/restoration costs. Such plans also signal important testing and inspection protocols, regulatory compliance, and permit renewals, as well as easing day-to-day operations for facility managers by highlighting qualified outsource services, suppliers, and contractors.

**Green action plans** identify short- and long-term goals for sustainability, focusing on both individual actions and contributions toward larger community-based aspirations. These plans are relatively new and are still in their formative stage, though they are much like master plans in that they are governed by global thinking, with an eye toward combining the symbiotic benefits of social/cultural equity, environment, economy, and education, along with core issues relating to building and operational performance.

All of these plans emphasize holistic approaches designed to keep us from basing our critical decisions on myopic, short-term, or limited frames of reference. Plans instill confidence that a program has been clearly analyzed and mapped and that it has the requisite critical buy-in by its constituency. As such, developing an appropriate plan at the genesis of setting goals can increase fundraising and the likelihood of success. In other words, don't wait for the flood to begin building your ark. 

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