



## Getting 'Shovel Ready'

It's fair to say that no matter what your political persuasion or your opinion of how to fix the economy, business is not going to be "as usual" for a while. Our Federal Government throwing out its version of a stimulus package for municipal recreation facilities has presented both opportunities and challenges for public entities seeking to tap into the millions of dollars afforded in the package.

Among those challenges is having a clear understanding of some of the lingo being used by elected officials and administrators at national, provincial and local levels of government. One of those questions is just what the term "shovel-ready" means.

Under the purposes and principles of this legislation concerning the use of the funds, it is stated that they must achieve purposes specified, including commencing expenditures and activities as quickly as possible but consistent with prudent management. While there is significant difference between a transportation bike path, a wetlands reclamation project and a community recreation center, there is a similar systematic planning process that is essential to each and a prudent and efficient timeframe in which to achieve any given project.

There has been many a recent discussion that still didn't resolve the question of what "shovel-ready" means, but agreement that a well-articulated and executed planning and design process is critical when acting as the stewards of these public dollars.

Typically, the planning, design and construction process consists of six distinct phases: programming, schematic design, design development, preparation of construction documents, bidding, and construction administration. These six steps are progressive, each building on decisions made and accepted, no matter what construction delivery method is used—whether traditional design, bid and build, construction manager, or design-build.

### **Schematic Design**

This step determines how the project will work and what it will look like. A series of space relationships and configurations are tested and critiqued considering site opportunities and limitations. Again, this phase is usually interactive, involving multiple stakeholders. At the conclusion of this phase, site plans, including utilities access and local zoning regulation compliance, floor plans, elevations and phasing plans will have evolved to clearly illustrate the project. The budget will be continually reviewed and adjustments made in both dollars and square feet.

### **Design Development**

The design development phase defines what the project is made of. Technical systems are detailed, materials and finishes are selected and the construction sequence or phasing is determined. The budget is often officially scrutinized by an estimator, the construction manager or contractor, pricing the material quantities and systems that comprise the project design. If this effort identifies budget breaks, an engineering exercise is conducted to

bring the budget back into balance through multiple methods from changing materials and systems to reducing square foot size as a last resort.

### **Construction Documents**

Following the previous steps, this phase literally puts everything into written form, including the instructions to build the project and translate it to precise scale drawings and specifications. The documents prepared are the foundation upon which the bids or final estimate of costs are determined.

### **Bidding**

As a public project, the determination of who will construct is usually made through a competitive bid process, and awarded based on the best bid submitted. This process may be managed by a professional construction manager who selects multiple subcontractors, or the bid may be awarded to a single general contractor who in turn selects the subcontractors. The design-build construction delivery method initially partners a contractor with the design team for an integrated process from the beginning.

### **Construction Administration**

This involves regular meetings and visits to the project construction site to communicate and answer questions about the construction documents to ensure the design intent is met. Requests for information are issued in written form by the contractors to ask or clarify questions about the project on anything from the curve of a wall and the connection of two pieces of steel to the depth of asphalt and proper turf seed mix.

On-time responses and collaborative problem-solving are essential during this phase.

We started with the question, "What is the definition of 'shovel-ready'?" The answer may be determined by the project type, engineering, energy-efficiency upgrades, land and water projects or buildings. However, the conclusion of the schematic design phase or when the project idea has been vetted and approved by the local officials, administration and citizens is often a logical pausing point. The project scope has been defined and fully priced to include construction, permits, contingencies, design fees and any other unique aspects. Approximately 20 to 25 percent of the design fees have been consumed with adequate dollars accounted for in the budget to complete design and construction.

While the term "shovel-ready" may not have a single accepted definition, a ready-to-go project must be based on reliable and responsible information to promote economic recovery, increase economic efficiency and provide long-term economic benefits.

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