

“The Pros of Planning”

A CHECKLIST FOR MASTER PLAN DEVELOPMENT

Understanding the Master Plan development process and selecting the right professionals to assist you is key to your success in this effort. Use this checklist to guide the preparation, organization and implementation of your master planning process.

1. A Master Plan is a major investment of time and money in the future of the site and program, and must be supported by the total organization. Which of the following is in place or needs to be established?

PREPARATION STEP:	Done	Needed
a. Governing board or committee has identified the outcomes expected from the master planning process.	___	___
b. Governing board or committee has determined roles of staff, board and consultants in developing and approving the master plan.	___	___
c. If consultants are to be used, governing board has determined the steps for a selection process (RFQ, RFP, references, interviews).	___	___
d. If needed, other agencies in the parent organization are appropriately involved in approval and/or funding.	___	___
e. Funds are in hand or pledged to support the planning process.	___	___

2. The Master Plan guides physical development to enable you to carry out the programs that express your mission in a manner that provides adequate revenue for a quality operation. Which of these steps do you need to complete as a basis for a Master Plan? Do you wish to complete this step as a part of the Master Plan or separately?

PREPARATION STEP:	Done	Needed	Part of MP	Separate from MP
a. Establish/update the mission for the organization.	___	___	___	___
b. Complete Feasibility Study to determine viability of current site and operation.	___	___	___	___
c. Complete Market Analysis to determine needs for programs and services.	___	___	___	___
d. Complete Organizational Analysis to determine operational requirements.	___	___	___	___

3. A Master Plan requires accurate assessment of all aspects of the facilities and property. A site assessment will be completed by the person(s) who develop the site plan. Preliminary and additional assessments may be helpful or necessary. Which of the following need to be completed and how?

PREPARATION STEP:	Done	Needed	Part of MP	Separate from MP
a. Accurate and current topographic map of property on computer disk.	___	___	___	___
b. Utilities for the property described and mapped.	___	___	___	___
c. Codes and regulatory agencies identified.	___	___	___	___
d. Structural assessment of specific buildings.	___	___	___	___
e. Soil studies to identify buildable or sensitive areas.	___	___	___	___
f. Engineering studies to address particular needs.	___	___	___	___

4. Developing a Master Plan requires professional leadership, whether provided by staff, volunteers or consultants. Use these guidelines when selecting a consulting firm to provide leadership for the project.

The consultants have:

- Experience in planning for camps and centers that are similar to your setting.
- Appropriate training and credentials for the phase of planning being contracted
- The required licensure for the task.

The proposal delineates:

- The scope of work to be provided during the process, the deliverables and outcomes at the conclusion.
- The involvement of staff and board members of the organization.
- The qualifications of the firm, including experience with similar projects.
- An estimate of cost, including the fee schedule used as a basis for charges, the billing practices, and the deposit required. It indicates any guaranteed maximum charge, if applicable.

The selection process includes:

- Checking with other clients to determine their level of satisfaction with the work of the firm with regard to timeliness, quality of work, holding to budget estimates.
- Interviews by phone or in person to determine compatibility with the mission of the organization, understanding of the issues and the process.
- An objective assessment of the firm's compliance with the criteria for selection based on the proposal, sample projects, references and interviews.

5. The completion of a Master Plan positions the site to make major improvements or additions. What are the plans for funding these capital projects? Have the priority needs or projects been communicated to the leaders/consultants?

PREPARATION STEP:

	Applicable to MP	Consultants advised
a. An established fund is available for construction of specific project(s).	<input type="checkbox"/>	<input type="checkbox"/>
b. Organization has received a pledge of funding for a specific project; plan will establish cost and provide materials to secure funds.	<input type="checkbox"/>	<input type="checkbox"/>
c. Key projects will be prioritized as a part of the Master Plan and a funding plan will be determined when complete.	<input type="checkbox"/>	<input type="checkbox"/>
d. Interpretive materials needed for fund raising have been identified and communicated.	<input type="checkbox"/>	<input type="checkbox"/>

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