

# From Survey to Scope

by Shari Goldberg

The benefits of a conditions survey have been touted extensively in these pages. It's an objective assessment of the building, it provides a way to understand the building's most pressing problems, and, as cost estimates are usually included, it can be used to set fundraising goals. It's a document that any congregation would be glad to have in its possession.

Still, a conditions survey must be interpreted—by both the congregation and an architect—before repairs can be undertaken. The survey document outlines suggestions, goals, and methods for building repair and restoration. Yet it does not include plans and specifications, which define the materials, techniques, and drawings to be used for each repair. Without these details, a contractor won't be able to interpret the architect's suggested work. In addition, while the conditions survey may label the most urgent of the repair projects, it does not specify in exactly what order to do them, nor does it set out a fundraising plan.

After the survey has been completed, most architects (or building conservators or engineers, depending on who has been hired to perform the survey) will advise the congregation about sequencing repairs according to the funds available and capital campaign plans. These meetings or conversations are usually included in the original conditions survey contract. To obtain plans and specifications, however, congregations must hire an architect with an additional contract. These post-survey, pre-construction procedures require significant commitments of time and funding; it is important that congregations plan for them before purchasing a conditions survey.

## *Step 1: Phasing*

One of the main advantages of the conditions survey is that it gives congregations an opportunity to see all of the repairs they will eventually need to undertake, not only the most obvious problems. But planning to complete all of the architect's recom-



*A conditions survey recommends lots of repair projects; the congregation and the architect work to develop a phased plan for completing them.*

mendations can be daunting. By designating phases, the congregation will be able to develop a long-term plan that incorporates each project.

Survey recommendations are usually prioritized, which provides a basis for phasing. “We designate each recommended repair a first, second, or third priority,” explained John Bero, president of Bero Associates Architects of Rochester, NY. “First priority items threaten life safety or require immediate stabilization. Second priority items are deferrable but necessary, and third priority recommendations are optional upgrades or elements for restoration. Congregations usually make a package with some items from each.” The “package,” or phase of work, is made up of a few different projects that will be completed at once or over a period of time.

The architect who completed the conditions survey will often assist the congregation in designating work phases. Walter Sedovic, of Walter Sedovic Architects in Irvington-on-Hudson, NY, includes several meetings in a typical conditions survey contract. “We like to have the religious leaders, the building committee, and the congregation present,” he said. “We clarify what's urgent. Then the building committee usually comes back to us with specific high priority items that they'd like to do.” Architects from Sedovic's firm then work to develop a schedule, setting out several phases with anticipated dates of completion.

Phases should be thoughtfully designed. In addition to urgency, congregations must consider fundraising prospects, programmatic needs, community support, and in-house capabilities. For instance, at St. Stanislaus Kostka Church in Rochester, NY, the congregation undertook a survey anticipating that its tower would require urgent attention. “The mortar was deteriorated and it looked like a huge crack was running down the middle,” recalled Kathleen Urbanic, chair of the Church Restoration Committee. The church's architect, Bero Associates, confirmed

that restoring the tower was a priority, but also pointed out repairs needed for the roof, masonry, and stained glass windows, and painted wood surfaces. Ultimately, the first phase was not only dedicated to the tower; it included repairing masonry on the lower front façade of the building. “We didn’t just think about high priority items,” Urbanic said. “We had to consider the congregation’s ability to fundraise as well. The masonry project was high profile. The congregation could see the results and that helped with fundraising for the more expensive tower restoration.”

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*Congregations should think about balancing large, expensive repairs with simpler ones to promote a sense of accomplishment.*

Indeed, congregations should think about balancing phases by combining large, expensive repairs and simpler ones. When Walter Sedovic Architects completes a survey, the firm includes a designation for items—of varying degrees of urgency—that can be easily and quickly accomplished. “We call them immediate concerns,” said Sedovic, “They don’t require capital fundraising. They’re mostly maintenance tasks, which can be done with little or no money for an immediate effect.” Sedovic mentioned cleaning drains or gutters and replacing door hinges or tracks as typical immediate concerns. Even if the building’s historic state is not dependent on these fix-it projects, they can be incorporated in a phase of work for almost instant results.

*Step 2: Plans and Specifications*

After phases have been established, the congregation will usually fundraise until it is ready to execute its first set of projects. Then the architect will need to be hired again; this time to prepare a bid package, which explains to potential contractors how the work is expected to be done. The bid package includes plans (drawings) and technical specifications that illustrate repair techniques, name materials to be used, and demand appropriate work conditions.

Under a standard contract, the architect will also come up with a cost estimate for the work defined, assist with bidding, negotiating, and contract selection, and perform contract administration (this includes periodic monitoring of the contractor’s work, but not necessarily close supervision). Most congregations re-hire the architectural firm that performed the conditions survey, although another may be selected.

Architect’s fees vary, depending on the complexity and size of the project, in addition to the usual factors of geographic location and firm size. Still, the congregation should not be tempted to go directly to the contractor and avoid the cost of having an architect involved. “I always recommend that congregations have us involved,” said Randy Crawford, president of Crawford & Stearns Architects in Syracuse, NY. “To go out to bid without technical specifications would make them very vulnerable to contractors.”

Working with an architect requires that the congregation be committed to continuous fundraising. After the congregation completes its first phase, it will fundraise again until it can afford to pay the architect and a contractor to implement the next phase. This process is repeated until all of the survey’s recommendations have been fulfilled.

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## *What will it cost?*

*There are two main expenses associated with purchasing a conditions survey: the cost of the survey itself and of the plans and specifications for the recommended jobs. Prices vary considerably for both components. For instance, the survey price will depend upon the final presentation of the document and the consulting services provided with it. Firm size, geographical region, and overhead cost—as well as the size, complexity, and number of their buildings—will also affect the survey cost. \$2,500 to \$30,000 is a usual if wide range (more expensive surveys may include reports from other professionals, such as an engineer).*

*Fees for the preparation of plans and specifications will be similarly varied. The architect or consultant may charge an hourly rate, or may contract with a lump sum for all the work involved. In order to avoid unanticipated expenses, congregations should request full fee schedules before hiring a consultant.*