

A SENIOR HOUSING MASTER PLANNING MANTRA
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“WORDS, THEN NUMBERS AND THEN LINES”

There have been many articles, books and conference sessions about the art and science of senior housing master planning. The purpose of this short little post is not to rehash those or discuss the finer points of senior housing master planning but instead offer a very simple mantra to guide your master planning process.

As a **development consultant**, I have worked with many clients through many senior housing master planning processes. I'm also often called in to help when, unfortunately, an original master plan took the client and the project down a road that did not lead to a feasible project. In many of those cases the tens of thousands, and in a few cases the hundreds of thousands of dollars, spent on senior housing master planning were lost.

Architects are often called in to lead the senior housing master planning process. I love architects. Some of my best friends are architects. But the initial inclination of many architects is to do a tiny bit of programming, perhaps some back of the napkin numbers, and then to start drawing fast and furious. The reason? Drawing is fun. It's exciting. But done prematurely, it is often an expensive waste of time.

So, instead, I suggest this little mantra for you, your architect or whoever is leading your **senior housing master planning process**.

STEP 1: THE WORDS.

Guided by your **market study** and personal vision for the project and with help from your architect, create a detailed program for the project. And not just the typical list of spaces and square footage but note who will be served by and who will work in each space, its necessary linkages to other spaces, and even how you want the space to feel and what type of resident or user experience you want to create. Your architect can help you with typical or industry average square footages. But don't draw any lines yet!

STEP 2: THEN, THE NUMBERS.

Working with your architect and /or pre-construction consultant, you can get dollar/SF construction costs, ideally a range of low to high, and apply those to the program (words) to get total construction cost. Then take those and do your first cut of a high-level but detailed pro forma including construction costs, soft costs (architect, site-related, change orders, FFE, **marketing**, startup loss, etc.) and financing costs. Your underwriter or banker can help you with current rates and financing costs and metrics necessary to achieve financing. You don't need a 30-page pro forma but a simple pro forma will tell you if the numbers work at least at a preliminary level. If they do, your senior housing master planning process can proceed to step 3, now you can start drawing! But if they don't, and they often don't at the first round, go back to Step 1 and determine what program elements need to be prioritized, eliminated or reduced or what additional revenues are necessary.

STEP 3: THEN, THE LINES.

Then, and only then, once you've gotten to at least preliminary "proof of concept" feasibility, NOW your architect can start Step 3 and begin drawing, i.e. **Lines**, consistent with the words and numbers. Plus, your architect will have the guidance and focus they need to be most efficient and creative.

Now, some architects will argue that some sites are so limited in size or so restricted by zoning or other requirements that the program (words) needs to be first fine-tuned to the site and I don't disagree with that. However, in these situations, simple conceptual "bubble diagram" drawings will typically suffice to start to figure out your site constraints, so you can adjust the program to what will fit. However, you and your architect will need to resist the temptation to do anything more than just address these site constraint issues at that point so you can then complete your Words and Numbers before beginning the more detailed drawing...

My experience has been that following this simple senior housing master planning mantra – **Words, then Numbers, and then Lines** – will save your project both time and dollars. I hope this is helpful and best of luck with your project!