

COUNTY OF MILWAUKEE
INTEROFFICE COMMUNICATION

DATE: July 10, 2017

TO: Chairman Theodore Lipscomb, Sr., Milwaukee County Board of Supervisors

FROM: Jeremy Theis, Director, DAS-Facilities Management Division

SUBJECT: **Informational Report – Courthouse Complex Planning Phase III Update**

Background

Facilities Management Division is providing an update to the Courthouse Complex Planning Program – Phase III as requested by the Milwaukee County Board of Supervisors. Multiple updates will be provided to the Board of Supervisors throughout this phase of the program, as well as all future phases.

Phase III Project Team Selection

Phase III of the Courthouse Complex Planning Program kicked off in June 2017.

In adherence to the County Board Resolution in file 16-673, and the adopted capital project, a vendor was selected via a competitive procurement process. Specifically, the language from the resolution is inserted here:

“BE IT FURTHER RESOLVED, the 2017 Phase III effort of the County Courthouse Planning Program may competitively seek and retain a consultant who will finalize the Courthouse Complex master space plan and develop implementation strategies and options to present to the Milwaukee County Board of Supervisors for review and approval.”

The Phase III effort was budgeted as WC14801 in the 2017 capital projects, with a budget of \$500,000. Three firms submitted proposals, including the consultant from the Phase I and Phase II projects. Proposals were received on March 10, 2017, and reviewed and evaluated throughout March 2017.

The selection team consisted of the Chief Judge, District Courts Administrator, Director of DAS-Facilities Management Division, County Principal Architect, and DAS-FMD Facilities Planning Director. The selection was based on criteria specified within the Request for Proposals and within the County Board approved 2017 capital project budget. A team led by Venture Architects was selected for the project.

Transition to a New Project Team as Part of Phase III

The transition to Phase III of this program provided a great opportunity to publicly seek the best value to the taxpayers for this effort. Having a new vendor on board also presents great opportunities. New vendors can bring a fresh eye to the needs of Milwaukee County and identify further opportunities.

The project team's associated with Phase I and II of the Courthouse Planning Program provided invaluable information in justifying the need for Phase III.

That said, not every project team is 'built' for all phases of the project, thus the reason for breaking efforts out in phases. This is very common in projects of this magnitude. We have transitioned from Courts System Strategic Planning to an Administrative Space Review to Architectural/Construction master planning in this process.

As part of the Phase I project, County staff and the Phase I consultant team drafted the following mission, on which the scope of services for each phase of the project is based (Phase III highlighted to represent current phase):

- Phase I: Identify a consolidated, redesigned space for the people working in and served by the County Courts; and identify the highest and best use of the County Courthouse.
- Phase II: Define a consolidated, redesigned space for the people working in the areas of non-court functions within the County Courthouse and Public Safety Building, and establish existing conditions and identify opportunities for increased efficiencies.
- **Phase III: Determine ultimate space locations for all Departments associated with Phases I and II; complete space programming, designing and build outs for swing space required for completion of Phases IV and V; determine preferred ownership, financing, and delivery methods for interim and ultimate solutions.**
- Phase IV: Complete planning, programming, and design of the new Criminal Courthouse and other required facility improvements.
- Phase V: Construct a new Criminal Courthouse, complete other required facility improvements and relocate Departments to ultimate locations.

Please note, line 207 of the engrossed resolution in file 16-673 struck the word "ownership" from the scope of Phase III, with that same direction further emphasized in lines 262 through 264.

To meet the differing needs of the project so far, you have seen that project team evolve as well. Each project team has identified critical opportunities for success for Milwaukee County and will continue to do so with this effort.

Phase III Scope of Services and Schedule

The Phase III scope of services consists of Task A, development of a master space plan and Task B, development of implementation strategies.

Task A – Courthouse Complex Master Space Plan

- Late September/Early October 2017 Publicly-noticed meeting to present Draft Master Space Plan
- October 2017 Project Advisory Group Final Review of Recommended Master Space Plan
- Third/Fourth Quarter 2017 Recommended Implementation Strategies to Advisory Group
- October 18, 2017 Informational Update to TPWT Committee on project status
- October 31, 2017 Final Master Space Plan
- November 29, 2017 Potential TPWT Vote on Master Space Plan (For Approval)
- Fourth Quarter 2017 Recommended Implementation Strategies to TPWT Committee
- December 14, 2017 Potential County Board Approval of Master Space Plan
- First Quarter 2018 Present Final Implementation Strategies to County Board
- First Quarter 2018 Potential County Board Approval of Preferred Implementation Strategy
- Second Quarter 2018 Project Complete

Phase III Space Validation and Programming

As we transitioned to Phase III, there was a clear requirement for the project team to utilize all information from Phase I and II. As noted in the attachments and as projects mature, validation of earlier findings is essential to this process. This is done to ensure that as organizational changes occur, we program for the future needs of every Department appropriately. If errors exist, we identify them and adjust as necessary. The space program for each Department will continue to be dialed in, with the involvement of that Department's leadership throughout each key step in the process.

The Consideration of Applying County Space Standards

Another major point to clarify is that the programming for future space applies County space standards contained within the 2012 Comprehensive Facilities Plan. These space standards are predominantly not currently in place within the Historic Courthouse, so there are many opportunities for further efficiency where appropriate.

Should the County move towards these standards in the Historic Courthouse, it will more effectively use the footprint available, however, it may require extensive renovation funding to achieve in some cases. For this reason, the attached program reviews for the County Board, as an example, indicate a possible reduction in square footage that may or may not be achievable with an associate renovation project. This is consistent with most Departments that occupy the Historic Courthouse. It does not mean the square footage would be reduced necessarily, but the program is identifying areas of opportunity should the County seek to achieve them.

The space program also notes that the County Board Committee Rooms can be thought of in terms of shared space. This can be done so with the County Board as first priority for all use at all times, but they could also be further utilized by other County Elected Officials and Departments when and where appropriate.

1. Validate essential and preferred operating adjacencies from Phases I and II.
2. Define a minimum of three scenarios for both short-term and long-term reuse for the Historic Courthouse, based on its highest and best use. These scenarios will likely be adaptations of the Phase II scenarios presented utilizing input from both Phase II and the consultant's work on Phase III.
3. Define short and long-term administrative space needs that exceed the support capabilities of the Historic Courthouse, Criminal Justice Facility, and potential new Criminal Courthouse.
4. Develop a minimum of three scenarios for short and long-term relocation of Public Safety Building occupants; to include the full functionality of the criminal courtrooms.
5. Develop a minimum of three scenarios for both short and long-term relocation of Historic Courthouse occupants as required to facilitate the highest and best use of the Historic Courthouse.
6. Investigate potential swing space locations for displaced County tenants (may include site visits with judicial officers or others).
7. Prepare a report documenting the master space plan, including graphical representations of recommended short and long-term locations of all County Departments, including those that must be moved off site to a County administrative site.

Task B – Implementation Strategies

1. Continue research and recommend new Criminal Courthouse ownership, financing, and project delivery method strategies (a minimum of three each).
2. Refine conceptual cost ranges for demolition of the Public Safety Building, construction of a new Criminal Courthouse, real estate and move management, swing space acquisition and coordination, improvements to the Historic Courthouse, and other potential operational costs.
3. Prepare a report documenting three implementation strategies, and provide a recommendation based on the County's fiscal capabilities.

Again, please note that Phase III implementation strategies will not include ownership strategies, as that aspect was removed as part of the file 16-673 engrossed resolution.

County and First Judicial Courts staff have scheduled a series of project meetings with the consultant to review progress and discuss future activities. The project schedule is as follows:

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| • June 1, 2017 | Kick off Phase III project |
| • June 2017 | Begin Development of Implementation Strategies |
| • August 1, 2017 | Recommended Master Space Plan Complete |
| • August 24, 2017 | Project Advisory Group First Review of Recommended Plan |
| • September 13, 2017 | Informational Update to TPWT Committee on Master Space Plan Status |
| • September 30, 2017 | Final Draft Master Space Plan |

Utilizing the space within the Historic Courthouse more efficiently was one of the core findings with Phase II. There are significant opportunities for increased space utilization with the Historic Courthouse, but that will likely require substantial funding to achieve. The Phase III team will work to make recommendations regarding where higher efficiencies are financially feasible and where the efficiencies may be better sought at a later date.

We look forward to the continuing discussions in providing the First Judicial District the facilities they need and deserve.

RECOMMENDATION

The Director of the DAS-Facilities Management Division respectfully requests that this informational report be received and placed on file.

Prepared by: Peter Nilles, Facilities Planning & Development, DAS-FMD



Jeremy Heis, Director
Facilities Management Division
Department of Administrative Services

Attachments: Phase II summary of County Board space program
Phase III working document for County Board space program
Phase III scope of services from Venture Architects

Cc: Chris Abele, County Executive
Raisa Koltun, Chief of Staff, County Executive's Office
Kelly Bablitch, Chief of Staff, County Board
Teig Whaley-Smith, Director, Department of Administrative Services
Steve Kreklow Fiscal & Budget Director, DAS
Vince Masterson, Fiscal & Strategic Asset Coordinator, DAS
Maxine White, Chief Judge, First Judicial District
Holly Szablewski, District Courts Administrator, First Judicial District

