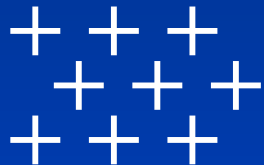




# Essentials vs. Extras: Setting the Right Scope on Your Next Self-Storage Build

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**Education:** April 7-10, 2026 · **Exhibits:** April 8-9, 2026  
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# Overtime With the Experts

If you have questions and would like to speak to the presenter(s) at the end of this seminar, please follow them over to Alliance 305 for “Overtime With the Experts.”

This will help us clear the stage and set the room for the next presenter. Plus, you’ll have 30 minutes to converse in an open, roundtable format.

**THANK YOU!**

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# Building Self-Storage: A Lucrative Opportunity

Self-storage is one of the most resilient and profitable real estate sectors. Success begins with smart, ground-up development decisions.

**From raw land through construction, every phase requires careful planning, coordination and a clear understanding of scope.**

This session walks through the full build process so you can avoid costly surprises and keep your project on schedule and on budget.

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# Where Do You Start?

## Critical First Step

Before you talk to architects, engineers or contractors, your first conversation should be with your local planning and zoning department. This single call can save you months of wasted effort and thousands in design fees.



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# Where Do You Start?

## Key questions to ask:

- Is self-storage a permitted use in this zone?
- What are the setback and height restrictions?
- Are there design review or conditional-use requirements?
- What's the typical timeline for permits and approvals?

**Pro tip:** Request a pre-application meeting with planning staff. These informal discussions can reveal potential deal-breakers early and often lead to creative solutions that keep your project viable.

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# Assembling Your Design Team

Once you've confirmed zoning viability, it's time to bring in the professionals who'll shape your project. These roles work hand-in-hand to translate your vision into a buildable, code-compliant design.

Your team should include:

- Civil and soils engineer
- Architectural
- Structural design team
- Contractor

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# Assembling Your Design Team

## What to look for:

- Experience with product type
- Geographically specific experience
- Sub-base knowledge
- Reputation and references

## Supporting conversations:

- Lenders
- Management companies
- Software systems

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# Assembling Your Design Team

This is when you:

1. Define building size and unit mix.
2. Understand site challenges.
3. Start getting **preliminary budget ranges.**



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# Phased Budgeting

**Your budget will move. Plan for it. The budget process:**

- Site-specific concept budget
- Entitlement approval budget update
- 50% construction document/engineering budget update
- Final budget update at permit approvals

**Early budgets are ranges, not final numbers. Why costs shift:**

- Raw material pricing (steel, concrete, fuel)
- Design refinements
- Code requirements
- Site conditions revealed during engineering

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# Reading Preliminary Bids: Who Does What

When preliminary bids arrive, you aren't just looking at numbers; you're decoding a complex web of interdependencies.

## **Pricing follows progress. For example:**

As the architect advances the building plans, the structural engineer can finalize structural drawings. This allows for permit submittal. The building provider can then finalize material quantities and pricing.

*Each step adds clarity and reduces guesswork in the bid.*

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# Reading Preliminary Bids: Who Does What

## What to watch for in early bids

Look for wording like:

- "Budget pricing"
- "Based on preliminary drawings"
- "Subject to final engineering"
- "Pending geotechnical report"
- "Excludes items not shown"

These phrases signal that design is still evolving and pricing may change.

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# Delivery Methods: Choosing Your Project Approach

How you structure your project delivery method affects everything from risk allocation to schedule control to final cost. Each method has trade-offs, and the "best" choice depends on your experience level, risk tolerance and project complexity.



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# Delivery Methods: Choosing Your Project Approach

## 1. Negotiated

- Delivery/design assist: Contractor on board early, provides collaboration between design/construction team from outset.
  - Owner hires design team, contractor provides budgeting and value engineering during design
  - Value proposition: No design build contractor mark-up on design costs, budget accountability by contractor and design by way of collaboration during design

**Risk:** Inexperienced collaborators might miss value engineering/design opportunities. leading to higher construction costs.

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# Delivery Methods: Choosing Your Project Approach

## 2. Design-build

- Single-source, turnkey design and build
- Provides a single source, turnkey entity for design and construction:
  - Design-build entity establishes baseline budget and controls design to budget
  - Value proposition: Single-source accountability

**Risk:** Inexperienced design consultants hired by an inexperienced contractor may lead to longer permitting times and higher construction costs.

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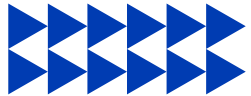




# Delivery Methods: Choosing Your Project Approach

## 3. Design - Bid - Build

- Design team hired first
- Contractors engaged after
- Final design to competitively bid



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# Delivery Methods: Choosing Your Project Approach

- Provides a level playing field for analyzing bidders.
- Requires a complete set of plans outlining project details and specifications.
- Success depends on hiring a skilled team across all design trades.
- Ideal outcome is the ability to buy from the lowest *perceived* bidder.

## Risks:

- Design inefficiencies due to inexperience may increase costs.
- No value engineering.
- No contractor engagement during design. Risk of expensive design decisions are unchecked.

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# Final Construction Bid Time

**Now the details really matter.**

You've navigated the permit process and hold finalized construction bids. This is your last chance to catch scope gaps, clarify assumptions and lock in expectations before contracts are signed. Read every line!



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# Final Construction Bid Time

## **Inclusions:**

What's specifically covered in the bid price? This should be comprehensive and cross-referenced to your drawings. If something seems obvious but isn't listed, ask about it.

## **Exclusions:**

What's explicitly isn't included? Common exclusions include permit fees, temporary utility connection, soil testing, waste management and taxes. You'll need separate budgets for these items.

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# Final Construction Bid Time

## **By others:**

Work that must be coordinated with but performed by different entities. Examples: data/telecom installation, signage, specialty finishes. Clarify who coordinates and who pays if problems arise.

## **Next:**

Schedule a bid-review meeting with your contractor. Walk through the scope line by line. Ask about allowances. These are placeholder costs for items not yet specified such as lighting fixtures or door hardware. Allowances can be under-budgeted, leaving you with surprise costs later.

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# Final Construction Bid Time

**Pro move:** Ask for a detailed schedule of values that breaks the lump sum into components. This helps with draw requests and shows you exactly where your money is going at each construction phase.



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# Contract Signed: Order of Operations Matters

The construction contract is executed, and your project officially moves from planning to building. This is when theoretical schedules become real deadlines and understanding the critical path—the sequence of activities that determine your completion date—becomes essential.



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# Contract Signed: Order of Operations Matters

## Critical path items:

- Long-lead materials
  - Structural steel, custom doors, HVAC units
- Weather-dependent work
  - Concrete pours, roofing, paving
- Inspections and approvals
  - Can't proceed until signed off
- Utility connections
  - Often dependent on municipal schedules

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# Contract Signed: Order of Operations Matters

Managing the sequence:

- Hold weekly construction meetings to review the upcoming two-week window.
- Identify dependencies and potential bottlenecks. When one trade falls behind, immediately discuss impacts on downstream activities. The earlier you spot scheduling conflicts, the more options you have to mitigate them.

Each phase depends on the one before it. Delays in early phases cascade through the schedule. For instance, if site work runs two weeks long due to wet weather, every subsequent phase shifts two weeks unless you can compress later activities. This is why a good general contractor is crucial to a project's success.

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# In the Field: Keeping Projects on Track

Construction is where theory meets reality. Even with perfect planning, unexpected situations arise—materials don't arrive, inspections reveal issues, weather doesn't cooperate or "field conditions" differ from drawings. How you respond to these challenges determines whether your project stays on schedule and on budget.



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# In the Field: Keeping Projects on Track

## Identify Issues Fast

Require daily site visits or reports from your superintendent. The faster you know about problems, the faster you can solve them. Small issues caught early rarely become expensive disasters.

## Communicate Clearly

Bring affected parties together immediately. Architect, engineer, contractor and relevant subcontractors should jointly problem-solve. Document decisions in writing to avoid future disputes.

## Be Solutions-Oriented

Focus on fixing the problem, not assigning blame. Ask: What are our options? What's the cost/schedule impact of each? Can we value-engineer without compromising quality?

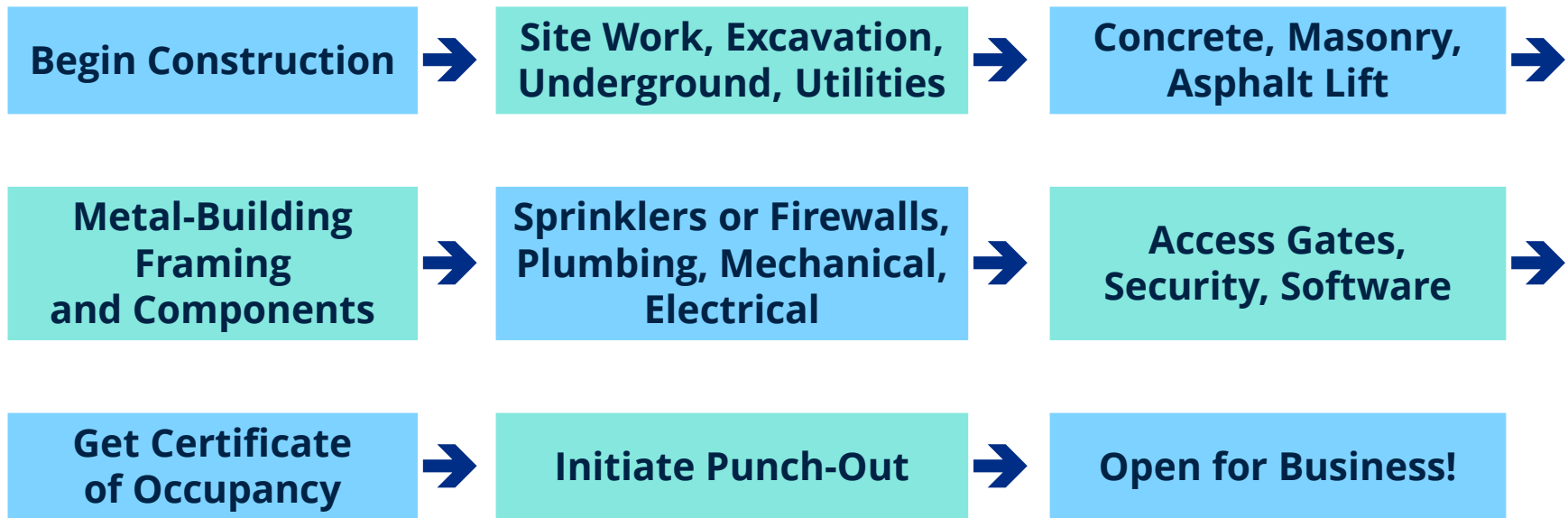
## Track Changes

Every deviation from the contract should generate a change order, even if it's zero-cost. This creates a clear record of what was built vs. what was originally planned, protecting you from future disputes.

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# In the Field: Keeping Projects on Track



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# When Climate Prohibits Construction

**Real-world example:** A self-storage project in the Pacific Northwest hit an unusually wet winter. Site work was scheduled for November through January—typically manageable in that climate. But that year brought record rainfall, turning the site into a mud pit.

**The impact:** Six weeks of lost time. Excavation equipment couldn't operate safely. Concrete trucks couldn't access the site. Even when rain paused, the ground remained too saturated for compaction.

**The lesson:** The contractor's schedule had zero float during site work. When weather hit, there was no buffer. The delay cascaded through every subsequent phase.

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# When Climate Prohibits Construction

## How to mitigate climate risk:

- Schedule weather-sensitive work during optimal seasons.
- Build float into early phases.
- Include weather delay provisions in your contract.
- Consider temporary weather protection.



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# When Soil Mitigation Becomes Necessary

## Real-world example:

A developer purchased a site for self-storage based on a Phase I environmental assessment that showed no contamination. Permits were pulled, contracts signed and excavation began.

Two feet down, workers encountered an oily odor. Testing revealed petroleum contamination from a long-closed gas station on an adjacent property.

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# When Soil Mitigation Becomes Necessary

## **\$180K in unexpected remediation cost**

Removal and disposal of 400 cubic yards of contaminated soil, plus confirmatory testing and regulatory compliance

## **\$65K in carrying costs**

Additional loan interest, extended equipment rentals and contractor standby time during the delay

## **8 weeks delayed**

Work stoppage for testing, regulatory approval of remediation plan and actual cleanup before construction could resume

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# When Soil Mitigation Becomes Necessary

## Why this happens:

Phase I assessments review historical records but don't involve soil testing. Contamination can migrate from adjacent properties through groundwater. Past uses—gas stations, dry cleaners, industrial sites—can leave hidden problems decades later.

## How to protect yourself:

Consider Phase II testing (actual soil and groundwater sampling) for sites near former gas stations, industrial areas or with unknown history. It costs \$5K to \$15K upfront but can save you six figures later. Include environmental contingencies in your budget—even "clean" sites can surprise you.

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# When Design Must Pivot

Midway through construction of a 60,000 SF self-storage facility, the developer received notice from the city. The approved architectural elevations didn't comply with a design guideline update passed six months prior. The city had approved the permit under old standards but was now requiring compliance with new facade material requirements before issuing a certificate of occupancy.

The original design featured standard corrugated metal panels—common in self-storage and previously acceptable. The new guidelines required a minimum 50% "upgraded materials" on street-facing elevation such as brick, stone or architectural concrete. The change would add significant costs and required architectural redesign.

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# When Design Must Pivot

**The outcome:** Additional cost of \$47,000 and three-week delay—painful but manageable because the team acted quickly. The lesson: municipal requirements can shift during construction. Maintain good relationships with planning staff and build contingency for mid-project design adjustments.

## Emergency Design Session

Architect and contractor collaborated to find a cost-effective solution that met new requirements without rebuilding completed work.

## Value Engineering

Replaced metal panels with split-face concrete block on street facade only. Used architectural reveals to add visual interest without premium materials.

## Negotiated Approval

Met with planning staff to present revised design. Demonstrated compliance while minimizing cost impact through strategic material placement.

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# What Successful Builders Do Early

After years in the industry, a pattern emerges among developers who consistently bring projects in on time and on budget. They share common practices that distinguish them from those who struggle with overruns and delays. These aren't secrets; they're disciplines that require foresight and, honestly, a bit of paranoia about Murphy's Law.

## **Treat budgets as living documents.**

Your project is a budget estimate until the last invoice is paid. Smart developers track actual costs against budget weekly, not monthly. They know exactly where they stand at every moment and can catch overruns early when they're still manageable.

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# What Successful Builders Do Early

## **Build meaningful contingencies.**

A 5% contingency is wishful thinking. Real contingencies range from 10% to 15% for straightforward projects to 20%+ for complex sites. Remember the first round of steel tariffs? Developers without adequate contingency watched their profit evaporate overnight. Contingency isn't waste—it's insurance against the inevitable unknowns.



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# What Successful Builders Do Early

## **Front-load consultant collaboration.**

Successful builders invest in early, collaborative relationships with architects and engineers. They don't treat design as something you buy and hand off to contractors. They engage designers throughout pre-construction to value-engineer, refine costs and anticipate constructability issues. An extra \$5,000 in design consulting early can save \$50,000 in construction changes later.



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# What Successful Builders Do Early

**As the old contractor joke goes:  
"Fast, cheap or good—pick two."**

But seriously, the developers who succeed don't try to cut corners on planning and expertise. They invest up front to avoid expensive surprises later.



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# Final Thoughts: Building Smart

Self-storage development offers outstanding returns when executed properly, but "properly" requires respecting the process. The developers who thrive in this space aren't necessarily the most experienced. They're the ones who ask the right questions early, build relationships with knowledgeable consultants, and treat construction as a collaborative problem-solving exercise.



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# Final Thoughts: Building Smart

## **Start with zoning.**

Confirm viability before spending a dollar on design.

## **Build contingency.**

Add 10% to 15% minimum, more for complex sites.

## **Budget in phases.**

Expect refinement as designs mature.

## **Read every line.**

Scope gaps cost you money.

## **Communicate constantly.**

Problems caught early are easier to fix.

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# Final Thoughts: Building Smart

The self-storage market remains strong, and well-located, professionally executed facilities continue to generate excellent returns. Do your homework, assemble a strong team, respect the process and expect the unexpected. Your future tenants—and your lender—will thank you.

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# Contact the Presenters



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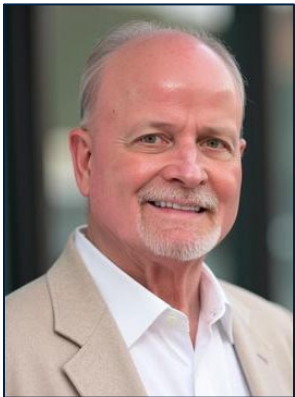
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