



Architecture: Standard & Specialized Services

For us, a design project is arranged into a series of 8 steps, give or take, organized to be cyclical in nature. As such, project and design information assembled along the way builds upon previous information, increasing in detail as it proceeds in an orderly fashion toward completion.

Because each project has a unique make-up due to the varying needs of each of our clients and the relative complexity and detail intrinsic to each project, we have the flexibility to expand or reduce the services that we will provide. This personal and customizable approach to our scope of services tailors our actions to your specific needs and the requirements of your project.

The following is a sampling of the actions that may be required in each phase of a typical full-service contract, as well as the typical reports and design document products developed for each phase.

Step 1 – Project Scope Definition, Feasibility, and Regulatory Research

During this crucial portion of the project, we will learn to work together as a team to achieve all of your goals. To be successful in the long run, we must conduct a thorough and meticulous process of information gathering and assembly. Little is done during this step in terms of design work, yet much work is accomplished. By being particularly thoughtful and absolutely transparent, all team members can enhance the probability of success. The actions conducted in this step of the design process produces an exhaustive list of criteria and priorities that establish the foundation for future design decisions.

Actions

- Preliminary meeting with owner, owner's representatives, and others to determine project scope – we'll ask questions such as: Where will this home be? Who will live there? How big will it be? How soon must it be done? At what cost?
- Project team assembly – architects, engineers, and other specialists;
- Onsite photography – aerial and/or existing buildings and landscape – measurement of as-built conditions where appropriate, in the case of an existing structure being onsite;
- Evaluation of site opportunities – what are the dominant views, external influences, parking, drives / access, walks, patios/decks, adjacent land uses, topography, climate influences, others;
- Coordination of support information – boundary and topographic survey, geotechnical engineering, hazardous materials, among others;
- Determine existing utility infrastructure and capacities – where is the drinking water and sewer? Do electrical, gas, and other utilities deliver service to the site?
- Determine regulatory agency review and approvals, and determining the regulatory criteria that may limit the construction and design, as well as the process to receive a variance from such regulations should that be necessary;

- Establish the exterior image – how do you wish to present yourself to the world? What examples from online (e.g. Houzz.com) and other resources can you assemble?
- Assemble initial building and site program, including equipment and furnishing requirements;
- Aerial imagery of the lot and general surroundings

Products

- Building and site program, schedule, and budget;
- Aerial and other imagery;

Step 2 – Schematic Design

Upon assembling the detailed program in step 1, we are ready to begin the hard and yet rewarding task of designing the perfect home for you. Typically, the first design solutions are created in hand-sketched format, but in some situations, we produce the first designs using our computer drafting system.

Actions

- Create as-built floor plans and exterior elevations, where an existing residence must be accommodated in the final design;
- Create sketches of preliminary floor plans, roof plan, cross sections, and exterior elevations;
- Through the interview process, we'll establish rooms, sizes, adjacencies, functional requirements;
- Evaluate / create the exterior architectural image, including the major exterior finishing materials, window positions and design, roof forms and other attributes that establish the outer image of your home;
- Prepare a site plan showing where the home will be situated, and including important site features (existing and proposed);
- Create 3-D exterior model for new buildings and major additions;
- Prepare preliminary cost estimate and preliminary time schedule;

Products

- Preliminary sketches of building floor plans and exteriors, proposed project schedule, Architect's cost opinion;

Step 3 – Design Development

The preceding step is designed to help our team sort through the various alternatives, design options, cost, and to generally set the course forward. While the preceding step may have several alternatives to be considered, going forward into Step 3, we will by necessity narrow that down to one successful option and image. The selected design solutions from the preceding step are integrated into our computer drafting system in preparation for construction drawings. In this step, we will begin to look more closely at exact dimensions, equipment, furniture layouts, window placement, roof form, and all other attributes associated with your home.

Actions

- Develop building and site plans with specific construction materials and parameters using accurate computer drafting and modeling technology;
- Coordination meetings with team members to initiate engineering and additional studies;
- General selection of exterior finishes, building envelope performance and construction parameters (construction, insulation, glazing, and others);
- Refine building program with additional space performance characteristics (lighting, acoustics, interior finishes, specialized equipment and others);
- Evaluate and select structural and mechanical systems;
- Update cost estimate based on refined data (size, expected finishes, volume);
- Agency review, if required (local jurisdictions, Owner Associations, special districts, among others);
- Energy performance modeling if required or desired;

Products

- Developed drawings of building plans, updated project schedule, updated cost opinion, preliminary specifications, preliminary energy models;

Step 4 – Construction Documentation

We enter this step with the assumption that all factors associated with the appearance, function and estimated cost meet with your approval, and we will ask for you to certify that in writing. It is important to recognize that design is still far from complete at this moment in time. Certainly, we have the general image and layout for the project, and it seems to work to suit your needs. However, there is now the need to lay over the extraordinary detail required to actually build the home. During this step, we will select all specific materials, where possible and recommended, to build the home. Depending upon your needs and the project requirements, some decisions may be delayed until after the start of construction (such things as paint color, specific fixture selections, specific cabinet designs, etc.). The construction details will be developed showing specific construction criteria and materials of construction and finish, along with coordination of all major design and engineering disciplines.

Actions

- Coordination meetings with team members to complete design integration of all systems;
- Create detailed and dimensioned architectural floor plans, elevations, sections, and larger scale construction details showing the means of construction and connection;
- Create architectural site plan showing the position of the home and important site development, such as driveways, walks, patios/decks, and general grades and contours.
- Create schedules of materials and equipment (doors, windows, fixtures, finishes) and specifications;
- Coordinate engineering drawings for integration into construction set, coordinate all details;
- Update all building reports necessary for approvals;

Products

- Construction plans and specifications, engineering and performance reports;

Step 5 – Regulatory Approvals

After the construction and engineering plans are complete, we now need to deliver plans to the local regulatory agency for their opportunity to review and approve the plans for construction. Each agency is unique to the jurisdiction that they represent, and some are more “intrusive” than others into the exact details of your design. For example, some regulatory agencies measure the height of a building at its lowest point at the surrounding grade to the highest point of the roof, while others measure from existing ground elevation to halfway up the roof. Having done a very thorough and exhaustive investigation during step 1 will pay off handsomely at this time, as the project will be designed to conform to the many and various requirements of the regulations in force. At the completion of this step you will typically receive a form from the agency to grant you the right to build the home that we have detailed in the drawings. Hooray – we can now proceed with construction!

Actions

- We will manage the preparation of documents to be delivered to the regulatory agency – construction plans, performance data and reports, applications;
- We are licensed Architects and as such we will seal and sign plans if required, and coordinate approved engineering documents to be included with the complete building permit drawing set;
- Drawing sets will be copied and delivered in hard copy and electronic format to the authorized regulatory agency for their review;
- We will doggedly monitor the progress of the review and approval of your plans, which is a process that can take from 1 to several months, depending upon a variety of factors;
- Perfection is a rarely achieved goal, and as such, should it become necessary, we’ll make changes to the drawings as required by the regulatory agency as conditions of approval;

Products

- Building permit plans, reports, specifications, and application materials;

Step 6 – Bidding and Negotiations

Although it is possible, we rarely conduct the actual construction of the homes that we design. In our opinion, it is usually best to hire a separate General Contracting company to do the hard work of building the home. There are a variety of ways to retain the services of a General Contractor, ranging from negotiated contracts (in which the contractor works for a pre-determined fee and the materials and finishes are billed at cost or cost plus) to competitive bidding (in which Contractor determines a bid from a competitive process and sets that as a maximum cost to you). There are positives and negatives to each, and we will consult with you and advise you of the most appropriate form of construction contract to seek. A word of preparation – the level of documentation required for a competitive bid is normally much more thorough than a negotiated contract, as in a negotiated contract, a number of design decisions can be delayed until during construction. Thus, in those kinds of projects, architectural and

engineering fees will be higher. Frequently our projects include the following list of services to be conducted during this step.

Actions

- Interview and pre-qualify general contractors that may be suitable for your project and would fit your requirements and lifestyle;
- Issue invitation to bid, copies of the bid documents (construction drawings and specifications) and instructions to pre-qualified bidders;
- Onsite meetings to review plans and construction parameters with General Contractors and major sub-contractors;
- Respond to questions from bidders;
- Issue clarifications, additional information, substitution requests, and addenda as required;
- Receive bids, review for completeness, interview General Contractors, and recommend selection;
- Assist you in the preparation of the construction contract;

Products

- Bid estimates, bid documents, construction contract;

Step 7 – Interior Design and Selections

This step results in the detailed selection of fixed finishes and equipment that will be installed in your home. It is likely the most crucial step, as the interior finishes, paint colors, fixtures, cabinets, lighting, sound systems, and myriad other items are the parts of the home that you are most intimately familiar. In a bid project, this step frequently occurs before step 6, as the selection of these features can have an impact on the overall project cost. In a negotiated project, these selections are commonly delayed until the construction period and made by you in consultation with your General Contractor. You may also either consider hiring an Interior Design (we can make references if you wish), or, if you trust yourself, you may actually conduct this step yourself.

Actions

- Detailed specification for fixed finishes (flooring, wall texture, trim and moldings, railings, among others);
- Selection of plumbing and lighting fixtures and finishes;
- Selection / coordination of specialty systems, such as sound systems, solar and other renewable energy systems, security, among others;
- Paint and stain color selection;
- Details of interior millwork such as built in shelving and entertainment centers, cabinetry, countertops, fireplace mantles and surrounds, etc;
- Patterns of materials – tile, carpet, and other floor, wall and ceiling finishes;
- Material research for critical properties and qualities, in the case of environmental sensitivity or environmental rating systems (LEED, Passivehaus, etc.);

Products

- Interior design drawings, fixture specification sheets, installation instructions, photographic or digital imagery, procurement if necessary;

Step 8 – Construction Observation

Having successfully navigated the design process, it will be time to build the home! This final step is the most complex and anxiety fraught, but is also the most satisfying and rewarding, as you breathe life into the raw materials that will become your home. Assuming we've done a thorough and complete job, you will have all systems and finishes detailed and ready for procurement and installation, you will have been granted permission to do so by the regulatory agency and you will have a qualified General Contractor ready to embark upon the construction process. During this step, and depending upon the agreement and qualifications of your General Contractor, we may have more or less responsibilities to cover for you. Please know that we are with you for the long haul and will support you and your project any way that we can, to make the process run more smoothly and less stressful for you. All of the services below can be considered optional, and you may wish to retain us on an as-needed basis. Or you may just wish to be hands-off and allow us to coordinate the construction of your home for you, along with your general contractor.

Actions

- Coordinate, conduct periodic jobsite meetings;
- Observe jobsite conditions to ascertain that the General Contractor and subcontractors are adhering to the approved plans, specifications and details
- Observe construction detailing as it pertains to the contract drawings and to energy / performance qualities;
- Review and approve applications for payment;
- Review owner and contractor generated substitution requests;
- Review and reply to contractor provided requests for information and change orders;
- Review schedule and budget criteria;
- Create punch list and final inspection walk-through reports;
- Coordinate with engineers and contractors for building O&M manual, commissioning reports, etc.

Products

- Jobsite reports, change orders;

Specialized services

Sometimes the needs of our clients or the requirements of their projects dictate that we expand our standard services to provide additional services and products. The following are some of the specialized and expanded range of services that we offer in house or through our associated professionals in the design and engineering community

Engineering (structural, civil, MEP, acoustic, geotechnical, and others)

Energy performance modeling and Renewable energy design

Energy use analysis

LEED, Green Globes certification

Architectural renderings and Architectural models (physical and computer generated)

Landscape design and specification of plant materials

Building signage

Sales and Marketing brochures, Aerial Imagery, Photography
Historic detailing and research