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## **Outline of Architectural Services**

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For most projects, my services are divided into four different phases that follow and build upon each other. These are called the Schematic Design, Design Development, Construction Document and Construction Administration phases. Depending on the project, it's not always necessary for me to complete or participate in all the phases, so my services can range from the full menu to à la carte. The following is an outline of those phases, information on fees and general organization.

### **A. Schematic Design Phase:**

#### **1. Goals for this phase:**

My intention for this phase of service is to solve the design to your satisfaction and provide you with the minimum amount of graphics needed to reach a good understanding of construction cost. The best way to initially see and understand your project is with drawings. And the most effective way to communicate with your Builder for preliminary costing information is with these drawings. For a relatively small initial investment, with that information you can make an informed decision about how to proceed with your project.

#### **2. Design Programming:**

This phase begins with your "Wish List", covering everything you can think of for your project, without regard to how any of it might work. At this stage if you allow yourself to dream and not worry about function or cost, you'll be more likely to express your complete idea. With that information, I can help you with form, function and budget, getting as close as possible to your dream while keeping your budget in control. This process is collaborative, where we're co-authors of the design and gradual, where we exchange ideas and information moving towards a highly creative as well as buildable solution.

From your wish-list, I'll develop a series of questions for you which I call the Program Question List. These questions will cover as much as possible, from your most general ideas to specific functions, sizes and elements of the building, to schedule and budget. I'll dialog with you to answer the questions and with that information will write the Design Program which will detail all the requirements for the site and building design. The more thorough a Design Program we create, the more quickly and economically I'll be able to solve the design.

During this stage and depending on the project, I may need other information such as an existing building survey, site survey, soil testing, utility survey, landscape survey, etc. I will also coordinate with the local authorities to research, as necessary, the zoning regulations and overlays, building codes, home-owners and/or neighborhood association rules, historic districts (local, state and national), waterway and wildlife protection districts and other authorities/regulations that would have an effect on the project. And if there is further research needed for the project, for example historical, archeological, etc., that can be done in the next part of the Schematic Design.

As part of the Design Programming, I will develop a rough construction cost estimate based on available information, such as total building and/or renovation area, local square-foot construction costs, coordination with local Builders and suppliers, etc. If this study shows a conflict with the project budget, we'll have an opportunity to revise the Design Program (and/or budget) before I begin the design.

Once we're in agreement on the Design Program and if there's no further research needed, I'll begin designing in two stages: Conceptual Planning and Schematic Design.

### 3. Conceptual Planning:

Based on our communications to-date, I'll begin the design process with general site and floor planning to bring the completed design program into graphic form. The Conceptual Plans are very simple, diagrammatic, single-line drawings that show the spatial relationships between the different areas of the project, their general sizes and rough shapes as well as the overall composition of the building and a rough calculation of total area. With this information, we can discuss how the building is organized in plan, how it functions and a rough estimate of construction cost based on square-footage calculations. Given a completed and thorough design program, I'll need to make only minor changes or refinements before moving into the Schematic Design plans. The Conceptual Design plans are the initial level of planning so, the shapes of individual rooms and areas as well as the entire building may change some as the design evolves. With these plans, I'll have a better idea of building area and can update the rough construction cost estimate.

The Conceptual plans will be a close answer to the Design Program but there are usually some minor refinements to be made since the drawings bring abstract ideas into graphic focus. It's possible to make bigger, even major or complete changes but since that would also reflect changes to the Design Program, adjustments in programming and design fees may be necessary before proceeding.

### 4. Schematic Design Drawings:

Following the Conceptual Plans will be more developed Schematic Design plans. These drawings are based on the approved Conceptual Design plans and add considerable information, including minor revisions from the Conceptual Plans, doors, windows, stairs, general kitchen and bathroom layouts, furniture and landscape planning and other information for your review and approval.

Once approved, I'll provide additional drawings showing the building in the vertical dimension: exterior and interior views, roof plans, cross-sections, etc. Depending on the complexity of the project other, more detailed drawings may be needed for preliminary structural, landscaping, lighting, interior design, kitchen, bathroom and other complex

spaces. Also, depending on the project and budget, I may develop a master plan and construction phasing schedule for building the project over a more extended period of time. Finally, I'll develop a preliminary specifications manual that will identify the building materials and finishes, the structural, mechanical, plumbing, electrical and special systems, as well as standards of construction quality.

We'll review and I'll refine these drawings and specifications until we're in agreement on the basic design. The Schematic Design drawings are not for construction but with this information, we'll have the "talking tools" to work with Builders and suppliers to develop a preliminary construction cost estimate. With that information, we can further revise the design, if needed, to meet your budget. At the beginning of the project, this process will give you much better control of the long-term project budget.

At this point I can also give you a detailed proposal for the Design Development Phase and estimates for the two phases following that.

#### 5. Modelling:

Over the years I've learned that one of the most useful design tools is a 3-D model of the project. This allows everyone, the Owner, Builder, Architect and anyone else with an interest in the project (such as a lender) to virtually walk around and through the building to see what it will look like fully in three dimensions and in any lighting condition. With this information, we can make changes before committing to more detailed drawings, not to mention actual construction. And those changes can be made easily and relatively inexpensively on the drawings as opposed to what could be prohibitively difficult and expensive once the construction has been started or completed. A model can be built in tangible materials such as cardboard or electronically using a variety of programs. The cost varies, depending on the level of detail and project complexity but will almost always pay for itself and improve the design with the abundance of information it provides.

#### 6. Collaboration:

I've learned that the mystique of the solitary Architect-genius is just that, an illusion. The strongest and best projects that I've been a part of were all based on collaboration between the Owner, Architect and Builder. Depending on the project, there may be other important consultants as part of this collaboration. With mutual respect and teamwork, this group creates the best possible combination of experience, inspiration and skill. And with this organization, the success of the project is in everyone's best interest. This approach is different from the traditional method but I can point to many highly successful projects that owe their success to this collaboration which affects everything from design, budgeting and cost-engineering to quality of construction. So, I encourage meeting your Builder or interviewing prospective Builders with you and creating this team from the very beginning.

## **B. Design Development Phase:**

Now that the basic design is completed, I can explore the best way to actually build the project. So, in this phase I will develop drawings that show the structural, plumbing, heating/air-conditioning and electrical/lighting systems as well as any special systems, more detailed interior, site and landscape design and planning and, depending on the project, a more refined master-plan and phasing schedule. Dovetailed with these drawings will be a more developed specifications manual. In addition to this, we'll discuss in greater detail and make decisions on: interior and exterior materials and finishes; kitchen and bathroom cabinets; appliances; lighting and light fixtures; plumbing fixtures and fittings; other interior design aspects and landscaping. We'll continue with our dialog of review and refinement of the Design Development drawings and specifications as they progress, so you'll continue to have an active role during this phase.

As with Schematic Design, the Design Development drawings and specifications are not for construction but with them we can work with your Builder, local sub-contractors and suppliers to develop a more detailed and accurate cost estimate. And with that information we can either continue to refine the design or proceed with the Construction Documents.

After completion of this phase, I can provide a detailed proposal for the next phase and a more accurate estimate for the Construction Administration Phase.

## **C. Construction Documents Phase:**

By now we should be clear on the project design, budget and schedule. So, my task now is to essentially build the project on paper (or screen). During this phase I will develop drawings and specifications that cover every single aspect of the project from the structural foundation to the last brush of paint. Some of this work will be in collaboration with consultants such as Geotechnical, Structural and Civil Engineers, and for more complex projects, Mechanical, Electrical and Plumbing Engineers and sometimes other consultants. The Construction Documents are a manual for building the project to such a level of detail that there will be no room for misunderstandings about materials or quality of construction. This will assure that what we have designed will be built as designed. The Construction Documents become part of your contract with the Builder and in addition to being the book of directions they are also a legal document. So, attention to detail at this stage is critically important.

The proposal for the last phase of architectural services will depend on some variables, which are presented next.

## **D. Construction Administration Phase:**

Traditionally, at this phase the Architect inspects the construction on a regular cycle, provides progress reports and is on-call to answer questions from and solve problems with the Builder and Owner. The traditional role of the Architect changes a little here so that he/she becomes an intermediary between the Owner and Builder as opposed to a direct consultant to the Owner. The collaborative model I've described is a much friendlier association and the construction, which always holds some surprises, is also a collaborative process with decisions being made in the best interests of the project and everyone involved.

Assuming you would like this kind of oversight, for projects at long-distance from my location I like to have a local professional, preferably a licensed Architect, provide this service. This person is one of the other important consultants mentioned in the section about collaboration. Depending on the project, it may also be beneficial to have this person involved with the Construction Document phase. Otherwise, for local projects, I or another qualified professional in my firm will manage this.

## **E. Fees:**

### **1. Why quality Architectural services pay for themselves:**

The journey from your design dream to the first time you walk through the finished building is thrilling. And the process of getting there is challenging. There are so many different, interconnected aspects to a building that a well-conceived design and methodical approach to solving how everything fits and works together is critical for a successful project.

Building design and construction are complex disciplines but when you're considering the cost of hiring an Architect there is a relatively simple way to look at that. Well executed design and thorough drawings are integral to providing the building that meets your needs, is built as designed and within your budget. Without this level of quality and attention to detail, the potential for mistakes that affect cost and how well the building functions is high if not inevitable. Some of those mistakes may not be correctable and the cost of others can be prohibitive.

As mentioned earlier, once the design is completed, the Construction Documents become part of your contract with the Builder and are both the book of directions for construction and a legal document. So, attention to detail and coordination is critically important.

By investing a relatively small percentage of the project cost in services provided by an experienced Architect, you are not only preventing expensive mistakes, you are also ensuring that what is built meets your needs and expectations. That aspect is priceless.

## 2. My fee basis:

Some Architects base their fees on either a percentage of projected construction cost or the estimated square-footage of the project. Because these are relatively arbitrary approaches which may or may not accurately reflect the Architect's actual effort, I have never felt that either are fair to the Client or the Architect. For all my projects, I base my fees entirely on the scope of my work, the hours required to accomplish that work and the related fees for the different levels of professional services (see #3, this section).

Again, I do not base my fees on a percentage of construction cost or any method other than what is described above. But when you do the math for my projects over the last 40+ years, my full-service total Architectural fees usually work out to between 7% and 15% of the project construction cost. This ratio can be higher for very complex and/or small projects and lower for simple and/or very large ones.

I welcome the discussion of fees as they are part of your project budget. And if necessary, I'm willing to work with you to reduce fees by reducing my scope of work to the extent it's appropriate and does no harm to your project. It's important to understand that there are trade-offs for reducing or eliminating aspects of my services which may place more responsibility for the quality of design and construction on you and/or the Builder.

## 3. Hourly rates:

In my practice I divide the work into different levels of professional service. Generally speaking, Principal time is that related directly to design. The Project Architect manages the technical aspects and general project coordination. Drafting time is for making the drawings, by hand and/or CAD, once the design and technical aspects have been solved. Clerical time relates to what's generally considered office management or secretarial work. Please contact me for current hourly rates:

- Principal:
- Project Architect:
- Senior Drafter:
- Associate Drafter:
- Clerical:

The following services are provided by separate proposal:

- 3-D modeling (solid or electronic)
- Civil, Structural, Mechanical and Electrical engineering

#### 4. Proposals:

I'll provide you with a detailed, line-item proposal for each Phase of the project. Only if and when you agree to the proposal, will I proceed with that Phase. My proposals present an estimate of professional fees based on assumptions for time needed for the respective scope of work. Those assumptions are based on many years of experience and part of my reputation depends on that accuracy.

For obvious reasons, the Schematic Design phase is less defined than the later phases which are based on a fixed design. At the beginning of the project, occasionally there are variations that just can't be anticipated. For example, it may take longer than expected to discuss and finalize aspects of the design programming or Schematic Design drawings. With that in mind, if my fee for the 1<sup>st</sup> Phase is more than estimated, it will be no more than 5%. Anything beyond that would reflect program changes as described in section A.2, fees for which you'd need to approve in advance.

#### **F. General:**

1. There is no cost to you for our initial meeting and depending on the project, an initial site meeting may also be provided at no cost.
2. There is no cost to you for proposals.
3. Once fully executed, this proposal becomes our agreement for professional services, our complete understanding and supersedes all previous agreements, either written or oral.
4. I normally request a retainer, which will be outlined in the first proposal.
5. The retainer is credited to the last invoice of the final phase of service. For most projects where all four phases of architectural services are provided, the retainer is credited at the end of the Construction Administration phase. However, the retainer can be credited to the last invoice of individual phases if full services are not required or if the project is indefinitely postponed or cancelled. If the final invoice is less than the retainer amount, the balance will be returned with the final invoice accounting.
6. Only time directly related to your project is invoiced.
7. The original drawings are my intellectual property, copyrighted and not for re-use on other projects without my written permission and compensation. I will provide you with electronic and hard copies for your project as requested.
8. Reimbursable expenses are generally: printing; scanning; shipping; travel and are billed at 1.1 cost. Any special expenses will be identified and agreed upon before work begins.
9. Invoicing is monthly for work accomplished by about the end of that month. Invoices are usually sent early in the first week of the following month and payment is due 7-days from the date of the invoice.

10. All invoicing must be settled before I can release the final, signed and sealed Construction Documents for permitting and construction.

11. For past-due invoices, I may need to postpone work until the invoice is settled.

12. Issues that can't be resolved in a timely manner through discussion and correspondence will go to arbitration with and under the rules of the American Arbitration Association and a verifiable, good faith effort shall be made by both parties.

13. You can postpone or stop the project at any time with written notification to me. I will invoice only for my time and reimbursable expenses up to the date I receive notification.

14. Either party may terminate this agreement at their discretion if it can be reasonably shown the other party has not fulfilled their obligations to this agreement. Notice of termination shall be in writing, signed and delivered to the other party at the address noted on this agreement. I will invoice only for my time and reimbursable expenses up to the date I receive or send notification.

15. My intention is to be available and fully focused on your project. I do my best to provide that dedication to all my clients and my decisions to accept or decline new commissions are based on that. I respect the time you will need to make design, budget and related life decisions which sometimes lead to pauses in the project progress. I will let you know if that creates any issues for my schedule and if so, will work with you to schedule resumption of professional services as close as possible to what works for both of us.