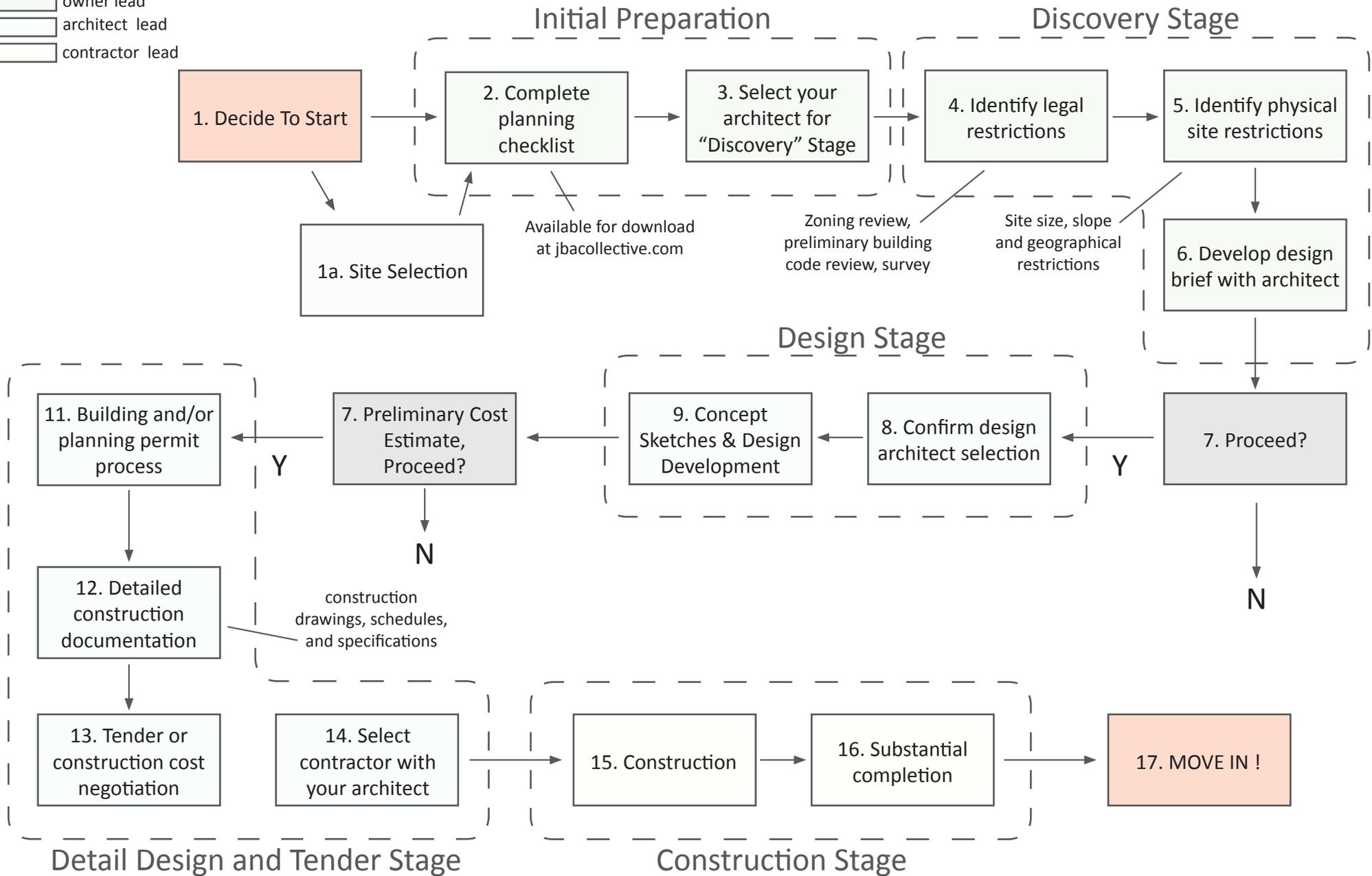


Project Timeline

Your schedule, knowing the steps

- owner lead
- architect lead
- contractor lead



The Design Process

Understanding your architect's process



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These tips are meant as a guide to choosing the best architect for your project. You will be working very closely with your architect on what may be one of the biggest investments of your life. Not only are an architect's answers to your questions important, but how they are answered speaks volumes too. Did they listen to your needs and take the time understand the details of your project? Did you feel comfortable with them? Did they conduct business in a transparent manner? Creating a new home or business is exciting, but can get intimidating at times. Choosing the right team can and should make it an enjoyable process. That team always starts with choosing the right architect and we hope these tips will help you with your selection.

The Process

Our industry has been around for a long time, and with that has come some standards for how architects practice. Although new technology and changing laws can lead to occasional changes, the general principles stay the same. The most important thing to understand is that getting a project designed and built is a process, and it takes time. Decisions are not made all at once, but throughout the course of a project.

Standard Phases

Standard phases bring an order to the design process. Each phase has a purpose and a level of expectations that you as the owner can expect to see. In general, the phases are sequential and have important and specific milestones to be achieved. As the owner, you will "sign-off" on the completion of each phase, permitting the project to move forward based on the decisions made up to that point. The phasing and "sign-offs" are essential to making the critical decisions at the correct moment during the project, as well as staying on schedule. The time frame to complete each phase varies depending on the complexity of your project. Here are the five standard phases:

- Phase 1 - Pre-Design "Discovery Stage"
- Phase 2 - Schematic Design
- Phase 3 - Design Development
- Phase 4 - Construction Documents
- Phase 5 - Construction Administration

Billing & Fees

Phases also help to determine fees and billing. A common misnomer is that the design fee is due up front or paid in one big lump sum. Your architect's fees are paid in parallel with the progression of the project. These payments are based on the amount of work completed during a given period, and are directly connected to the project's design phases.

Fees

Our design fees are set at the beginning of a project as either a fixed fee or an hourly fee (with an estimated number of hours to complete). The total fee is then divided into the individual phases by percentage of the total fee (for fixed fees), or as an estimated number of hours per phase (for hourly fees). Our goal is to have a transparent dialogue regarding fees. We insist on starting this discussion from the beginning of a project, helping to avoid surprises down the road. Often it is difficult to estimate fees at the beginning of a project. Be skeptical of any architect that quotes you fees before learning about you and your project's requirements in detail. Design fees can vary from project to project depending on the following factors:

- Project Complexity
- Project Location
- Project Quality
- Owner's Schedule
- Project Type
- Project Size
- Scope of Services
- Owner's Budget

Design Phases

PHASE 1 - Pre-Design “Discovery Stage”



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PHASE 1 Pre-Design

Goal: research and determine the owner’s criteria for the project.

Fee Breakdown: 5-10% of total fee

Before Design

Simply put, pre-design are any services that are done before starting your design. Sometimes these services are offered prior to the design contract, while other times they are included. Pre-design services can vary greatly depending on the complexity of a project and the experience of the owner. Sometimes an owner will come to us with most of the pre-design criteria established, however, more often, the owner needs our experience and researching capabilities to properly determine the project’s needs and requirements.

Services

The Pre-design phase may involve the following services:

Programming

Programming consists of establishing and documenting detailed requirements for the project relating to, but not limited to, design objectives, development of space requirements, relationships between spaces, flexibility and expandability, special equipment and building systems, and site requirements.

Budget Analysis

The budget should have estimated costs for both the hard costs and soft costs involved in your project. Hard costs are construction related costs including material, labor, and the contractor’s overhead and profit. Soft costs are non-construction related costs including

the designer’s fee and expenses, consultants fees and expenses, city fees, bank fees and interest, and insurance. It is also important during this phase to generally assess if the budget is adequate to complete the project given project type and quality.

Schedule Development

The following are just a few of the factors that contribute to the project schedule:

- Owner schedule
- Owner sign-offs and decision making
- Designer schedule
- Consultant schedules
- Project complexity
- Permit process
- Project Bidding
- Contractor availability
- Contractor schedule

Because of all the various factors involved in the schedule, it is important to continually adjust the schedule as the project proceeds.

Code Analysis

It is important to understand the rules of the game before you play. This ideology is ever important when it comes to your project. Cities and often specific regions within cities have different sets of rules governing many aspects of your project.

Design Phases

PHASE 1 - Pre-Design “Discovery Stage”

Space Analysis

In certain projects we will produce space analysis studies that may include: diagrammatic studies and descriptive text, establishing program and area requirements, general space allocation and adjacency, design flexibility, and future expansion requirements.

Existing Conditions and Site Surveys

Many projects are renovations or additions to existing structures. These types of projects require a record of what is built. Most of our clients do not have drawings of their existing project sites. Depending on the size and scope of your project, an as-built consultant may be required to measure and create accurate CAD drawings of your existing site conditions. For most interior renovation projects a site survey will be included in your architect’s scope of services. It is essential to start your design project with accurate base existing conditions drawings. It will save you time, cost, and headache in the long run.

Site Analysis and Selection

Whether you already own a site for your project or would like our assistance in finding one that will meet your needs, we are diligent when it comes to site analysis. It is our belief that great design comes from a buildings relationship to its site. We analyze a projects site to determine what makes it valuable, what are its opportunities, and what about it is negative and needs to be properly dealt with.

Consultants Needed

Aside from our services in the Pre-Design phase, most projects require that the owner hire consultants to prepare the following two documents:

Site Survey

A map depicting the boundaries, topography, utilities, and existing buildings on a particular site.

Soils Report/Geotechnical Investigation

Soil borings and laboratory tests performed to determine the strength, compressibility and other characteristics of the soil conditions of a site. This type of report is more frequently required in hill-side or costal areas. We are happy to refer our clients to surveyors and soils engineers that we have used in the past.

End of the Phase

The pre-design phase officially ends when the owner signs off on the approved program, budget, schedule, and code analysis. At this point, any site analysis should also be complete.

Design Phases

PHASE 2 - Schematic Design

PHASE 2 Schematic Design

Goal: utilizing the criteria established in Pre-Design, graphically explore design alternative concepts. Then present these options to the owner and narrow them down to one preferred concept.

Fee Breakdown: 15-20% of total fee

Commencing Design

Schematic design typically begins in rough form as sketches, floor plan studies, and/or quick models. Several owner and designer meetings are typical during this phase to make decisions and determine a design direction.

Documents

At the end of this phase it is common to have the following documents:

1. Site Plan

A drawing depicting the buildings location on the site.

2. Floor Plans

Drawings of each floor showing the size and locations of the various rooms/ functions.

3. Key Elevations

Drawings of appropriate building sides to convey conceptual design direction for the project.

4. Key Sections

Building cut through drawings depicting the heights and relationships of the various floors and roof.

5. Area Analysis

A summary of the sizes of the various rooms/functions in the building.

6. Renderings or Model

3D renderings or a physical model depicting the overall look of the building.

7. Preliminary Cost Estimate

A rough estimate of the cost of construction based on the current building design.

The preceding list of drawings may still be rough in nature at the end of this phase. Their intent is primarily to determine a design direction with which to proceed into the next phase.

End of the Phase

The schematic design phase officially ends when the owner signs off on the drawings and design direction, giving approval of the design up to this point. One or two design options may still be carried over to the next phase for further refinement, but the overall design concept should be established by the end of this phase.

Design Phases

PHASE 3 - Design Development

PHASE 3 Design Development

Goal: refine and develop the design such that most of the major design decisions have been made. Implement the various systems into the building.

Fee Breakdown: 15-20% of total fee

Finalizing the Design

The design development phase typically includes finalizing the size of the various rooms & spaces, refining the look of the project, selecting exterior and interior materials, determining the project's systems, and deciding upon door and window types and locations. This phase may also include several owner/ designer meetings which are critical to finalizing design decisions so that the detailed documentation can commence in the next phase.

Interiors

One common question that arises is what level of interior design do we provide as part of our basic services. Simply put, we will design everything that is typically built-in to the project. This includes basic cabinetry and finish materials such as tile. This does not include furniture or stand alone light fixtures. If you would like detailed interior design services, we are happy to provide these for you at an additional cost, or collaborate with the interior designer of your choosing.

Building Systems Consultants

Building systems could include HVAC (heating, ventilation, and cooling), electrical, structural, audio visual, building automation, etc. It is during this phase that the systems consultants begin to design and draw up their portions of the work. It is our job to coordinate the

work of these various consultants, implementing their drawings into the overall design of the project.

Documents

At the end of the design development phase the previously listed documents from the schematic design phase should be updated in further detail. In addition, it is common to also have the following documents:

1. Outline Specification - Preliminary written description of the project's major systems and materials.
2. Key Interior Elevations - Drawings depicting the vertical relationship and material choices of the project's interior rooms.
3. Reflected Ceiling Plans - Drawings of the ceiling depicting locations of lighting, equipment, & level changes.
4. Interior Schedules - A detailed list of the type and location of interior finishes.
5. Door & Window Schedules - A detailed list of the type, size, graphic appearance and location of all of the doors and windows.
6. Key Details - Large scale technical drawings of specific elements within the project.
7. Systems Consultants' Drawings - Varies with each project. May include structural, civil, electrical and mechanical drawings.

End of the Phase

The design development phase officially ends when the owner signs off on the drawings, giving approval of the design up to this point. By the end of this phase all design decisions should be made.

Design Phases

PHASE 4 - Construction Documents



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PHASE 4 Construction Documents

Goal: to prepare the technical written and graphic documents that set forth the requirements for constructing the project and obtaining government agency approvals.

Fee Breakdown: 25-35% of total fee

Instructions for Building

The construction documents phase involves adding a level of detail and technical information to the design documents such that a contractor has a set of instructions with which to build the project as designed. This set of instructions is, however, not a complete set, as the contractor is responsible for many aspects of constructing the project.

This phase may also include several owner/designer meetings, however, it is not as likely as previous phases considering most of the design decisions have been made. This phase is more about the designer and consultants working through the technical aspects of the project.

Permitting

It is during this phase that the project is submitted to the local building department for what we call plan check. Plan check is the process by which the various city agencies review the submitted documents for compliance to the codes. The owner will be required to pay a fee to the city when the documents are submitted to plan check. The time frame for this process varies depending on your project's size, complexity and the speed of the local jurisdiction.

After the various agencies review the project they will return the documents with corrections. Every project has some level of corrections. This does not mean that the work was done improperly. The designer and consultants will then fix the corrections and re-submit the documents for a second review. If the submitted documents then meet the agencies approval, the owner will be allowed to pull a permit to construct the project. All this means is that you will pay the permit fee allowing construction to commence. For an additional fee, most jurisdictions will expedite this plan check process. A code consultant and expediter may be required.

Documents

At the end of the design development phase the previously listed documents from the schematic design and design development phases should be updated in full detail. Additional documents will also be created as part of this phase and can vary greatly depending on the scope of the project. A completed construction document set is highly technical and can be quite extensive. Those unfamiliar with the industry will often have a difficult time understanding these types of drawings. It is also important to note that these documents are a major portion of the contract with your contractor. They become legal documents, like insurance, to ensure the contractor builds according to the specified design intent and quality.

End of the Phase

The construction document phase typically ends when the permit is pulled and construction begins. However, sometimes a permit is pulled before all of the construction documents are complete since not all of the documents are required to obtain a permit.

Design Phases

PHASE 5 - Construction Administration



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PHASE 6 Construction Administration

Goal: to observe the construction of the project for general conformance to the construction documents. Assist the owner with contractor payment requests. Handle requests for changes during construction.

Fee Breakdown: 20-25% of total fee

The Owner's Agent

During the construction observation phase the architect will act as the line of communication between the owner and contractor.

Once the project construction commences it is important to keep the designer involved in the project to assist the owner with the following tasks:

Observation Services

The architect will visit the construction site at appropriate intervals to observe the work for general conformance to the construction documents.

Evaluate contractor requests for payment

Assist the owner in processing payments to the contractor by visiting the construction site to determine if the particular work described in the payment request has actually been completed.

Process submittals

Review shop drawings, product data and samples for general conformance to the design intent. Review results of tests and inspections

Keep the owner informed as to the progress of tests and inspections during the construction process.

Supplemental documentation

The designer can provide supplemental documents to clarify design intent for the contractor.

Handle requests for changes

The contractor, architect, or owner may need to change something during construction. The architect can administer this process and prepare the necessary construction document revisions.

Resolve claims between the owner and contractor

The architect acts as the mediator between the owner and contractor if a dispute arises. This is the first and least expensive step to conflict resolution during construction.

Administer the project close out process for the owner

Assist the owner with the various processes and steps that occur as construction ends.

End of the Phase

The construction observation phase typically ends when the construction is complete.