

1. Project Planning Summary Sheet

Project planning pack for new construction research

The #1 Project Problem – Projects going over time and over budget.

The current widely accepted model for designing a new home promotes jumping into the design phase before adequate research has been performed. This is like trying to start the build process without first getting the foundation ready.

This is why we created this **Project Planning Pack**. This simple tool will help you move through the research phase. Using this tool will help reduce project risk and get your home completed on time and on budget.

This packet includes:

🏠 1. Summary Sheet

- Once you've checked all the boxes below, you'll be more ready to move to the Analysis Phase

🏠 2. Project Roadmap

- Review the roadmap and identify where you are in the building process.

🏠 3. Building Experts Directory

- Gathering professionals who can help at each stage of the building process.

🏠 4. Building Cost Estimator

- A simple fill in the blank worksheet for estimating your building project.

🏠 5. FAQ's and SAQ's

- Frequently-asked and Should-ask questions.

🏠 6. Myths and Realities

- Some things that happen outside the design process.

🏠 7. Nine Questions to Create a Design Brief

- Creating a shortlist to get your project started.

🏠 8. Readiness Scale

- Gauge of how ready you are to move into the design phase.



2. Project Roadmap

Steps required for designing and building your new home

Getting from Here to There

You can consider yourself in the Research Phase. This is where you explore ideas and gather information. As ideas progress and get more solid, you'll want to check the feasibility of your ideas and understand what the constraints are. If you choose to work with us, we will move to the Analysis Phase by exploring your needs and options, eliminate assumptions and identify constraints in an effort to get to the best options for you.

1. Research

Design Firms
Builders
Magazines
Online Resources



2. Analysis

Needs & Wants
Review proposals
Design Firm Selection



3. Design

Concept Sketches
Design Development
Consultant Selection
Contractor Selection



4. Documentation

HOA approval
Construction documents
Permit approval



5. Finalize Bid

Bids from contractors
Negotiation



6. Build

Contractor builds
Design Firm advises



When you're ready to review the feasibility of your project, email or call us.



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3. Expert Directory

Putting together a team of trusted professionals.

How Many Experts Do You Need?

Understanding what to do is one thing, finding the right pros to help you is another. You may not realize how many people it takes to put a project together. To understand this better, here is a list of all the people we'll need to choose for your project.

We have an extensive list of great professionals we've worked with over the years. We'll put together the design team that is right for your specific project.

If you have any other questions about your project, please call us. We're willing and able to help you answer your questions. If we can't answer them, we know someone who does, and we'll get you in touch with them.

A typical project will include:

🏠 1. Design Firm

- Not only a professional who gets your thoughts on paper, but a team leader who organizes and directs the design team.

🏠 2. Builder

- You and your builder will spend a lot of time together. Finding the right fit for your project will be paramount.

🏠 3. Interior Designer

- You will need someone who understands your personal style. We can help you find the right designer for your project.

🏠 4. Landscape Design Firm

- Not all projects require a landscape design firm, but we strongly recommend hiring a professional in this field.

🏠 5. Surveyor / Civil Engineer

- We'll need an accurate topo map and boundary survey. This will also show us any potential problems with the lot.

🏠 6. Structural Engineer

- We will want to choose the right engineer for your project. There is a lot of money tied up in the structure. We want an engineer that understands your specific project.



4. Building Cost Estimator

Understanding the factors that affect cost.

The inevitable question...how much will it cost?

The dreaded question that every design professional tries to avoid; how much? There are so many variables that a definitive number is impossible to define so early in the process.

The problem is that this question is incredibly important. We don't want to draw something you cannot afford, and you can't proceed if you don't have some financial parameters.

Here are a few items to think about when trying to determine costs. If you choose to continue with us, we know all the ins and outs of these items. Having a contractor on-board is always a big plus too.

Pricing can be affected by:

🏠 1. Site Conditions

- Steep slope – driveway length – sandy or rocky – sun exposure – easements – setbacks – HOA requirements – site accessibility, etc.

🏠 2. Specific Building Department and HOA Requirements

- Each municipality requires different things. Some may require a fire suppression system, while others don't. Some require driveways with less pitch, some allow higher rooflines, etc.

🏠 3. Current Material Costs

- The only way to understand material costs is through the bidding process but a good contractor can give us a thumbnail sketch of the current costs of building materials. Building material costs change almost daily.

🏠 4. Level of Plan Detail

- Is your vision simple or complex? Do you like many rooflines or few? What is the overall style you're trying to achieve?

🏠 5. Finishes

- Are you in love with \$200 per square foot tile, or can the designer suggest alternates? How about exterior wall finishes...are you looking for reclaimed wood, clear cedar, fir or some other species?



5. Questions Worth Asking

When hiring a design firm, it's helpful to have a process to make sure you get the best person for your project.

Asking the Right Questions

Not all designers or architects are created equal. Finding the right firm for you depends on several factors, including; personality, design ability, ego, designing for taste or to make money and budget, just to name a few.

Choosing the right design team can mean the difference between an enjoyable experience and one plagued with problems. The following questions are designed to help you more effectively choose the right design firm.

<input type="checkbox"/> What unique value do you have for our specific type of project?	<input type="checkbox"/> How would you like me to share my ideas, images, needs, wants and research?
<input type="checkbox"/> How can you add value to our home so we can maximize the return on investment when/if we sell?	<input type="checkbox"/> What can we do to help you deliver the best work for us?
<input type="checkbox"/> Do you offer a pre-design analysis to help move us safely and efficiently towards the design phase?	<input type="checkbox"/> Have you designed homes in our neighborhood, or in a similar one?
<input type="checkbox"/> What are the specific challenges for our type of project and how have you overcome these in the past?	<input type="checkbox"/> Will you recommend the other professionals we will need to put together the best team for our project?
<input type="checkbox"/> If my budget, timeline and scope are unrealistic, will you let me know?	<input type="checkbox"/> Will you guide us through all the approval processes, including HOA and building permits?



6. Myths and Realities

What does your design team actually do?

There may be more to your design than you think. The design firm that manages your project should ensure that every part of the process is handled. This is the best way to be sure your biggest investment comes out the way you need it to.

What people think a design firm does:

Dreams up and draws plans for a builder to construct the project.

What your design firm actually does:

Checks the title and plat looking for easements or any other land issues that may restrict what or where you want to build.

Ensures compliance with building and safety codes and regulations, HOA requirements, planning regulations and restrictions. Depending on the project, there may be laws surrounding the preservation of the local environment, ridge lines or other issues.

Leads the team of professionals who will work on the project including the contractor, engineers, designers and other consultants.

Creates the construction documents from the initial design into instructions and technical specifications for contractors and construction trades. Ensures those specifications are met.

Oversees the project through site visits and meetings, observing the construction and validating quality of work. Resolves any problems which may arise during the course of construction.



7. How to Create a Design Brief Using Only 9 Questions.

Questions to get you started

Do you need more help? If you don't know where you want to end up, it doesn't matter which way you go. Sound familiar? Here are some simple questions to get your mind going in the right direction. We can help you get more detailed with your questions...just call when you're ready.

Question

Answer

1. What does your family currently need from a home?
2. How do you live? Is that changing or about to change?
3. What will you need to see to know that your project will be a success?
4. How have you felt as you've walked through other projects? Will the spaces in your new home reproduce those feelings?
5. Who are the important people this home needs to be designed for? How will the home accommodate them?
6. What are the budget, timeframes and Boundaries we need to work within?
7. What does your home really mean to you?
8. Will you use this home as a primary or secondary residence?
9. Does the community you are building in offer all of the amenities you are looking for?



8. Readiness Scale

Are you ready to move into the design phase?

Do you need more help?

This final exercise will allow you to assess how ready you are to move forward and get more help from a design firm. If your answers are not definite, you may want to seek help from an expert to do the research.

If you move too quickly into the design phase, you'll run the risk of making too many assumptions. Assumptions are the #1 reason projects go over budget and over time. In lay terms...measure twice, cut once!

Rate yourself on a scale of 1-10 on the following questions.

Question:

Scale 1 – 10

1. How clear are you on exactly what you need?
2. How aware are you of all the various options your site will accommodate?
3. How confident are you that you are aware of all the legal requirements?
4. How aware are you of the process you will need to have in place to get the project completed on time and on budget?
5. How confident are you that your budget is sufficient to meet your needs?

Don't worry if you're not at 10 on all of these questions. That's what we are here for. We can help you get ready for the design phase with confidence. When you're ready to build, we're here to help.

