

Architectural Projects: A Step-by-Step Guide

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Designing for Your Reality



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So you are thinking about starting architectural work on a building. Whether you want to create a space for your business, your family, your tenants, or your faith community, many of the steps are the same. Here are some things to consider as you head into the wild world of project construction!



Decide



...that you want to get started. (Perhaps you are already done with this step!) This involves considering whether you are ready, willing and able to initiate your potential project. Sometimes you have a dream, but it just isn't the right time. If you have thought about it for awhile and the time is right, just make the decision. Don't forget to discuss it with your significant other or business partner!



Consult



...with a licensed Architect experienced in your type of project. An experienced architect will help you determine the feasibility and budget for your project. You can determine right away if this is a go or no-go for what you want to accomplish within your financial means. The architect should be familiar with what your local jurisdiction will allow in terms of lot coverage, setbacks from the property line, how long it will take to get permits, and other technical issues. Remember that you don't need to come up with the design ideas yourself. Just let the architect know your desired goals. The architect could provide ideas that you may not have considered to make the project more creative, attractive, cost-effective, or to increase the property value. If you are ready for this step, you've come to the right place! [Click here](#) for your free Bay Area architectural consultation.

Consider



...the information you received in your architectural consultation. Do you want to proceed? Are you willing to spend the time to get the ball rolling, including getting the project financed and working with the project team to make decisions?



Prioritize



...your “wish list” for the project. What is your biggest concern? Is it the cost? Is it the resale value of the property? Is it the desirability to potential tenants? Is it something you want for your own long-term use or enjoyment?



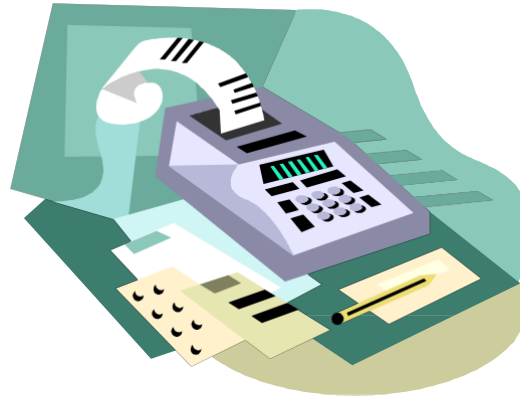
Organize



...your project. Separate “wants” from “needs”. This step will help you determine the “scope of work” for your project, which is basically the list of things you want to accomplish.



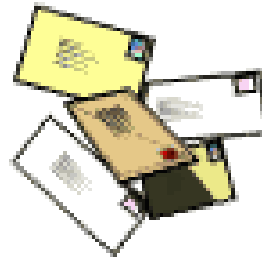
Budget



...your project. Figure out whether you want to use savings or get a loan. Be sure to include a cushion for unexpected “contingencies”. Check with your banker or financial planner for advice on how much you wish to budget for the project. Check with a real estate broker about how much the project is likely to increase the value of the property. You may wish to wait on executing a loan until you have firm bids on the construction cost for your project. At this stage, however, it is wise to know how much funding you have access to and what it will take to acquire financing.



Request



...a proposal from your chosen architect. Be sure to choose an architect who is licensed in your jurisdiction, carries professional liability insurance, and has experience and a portfolio of successful local projects. Find someone who you communicate with comfortably and who listens effectively. You may want to be assured that you will be working with an experienced architect in a firm and not a more junior staff member. The proposal should include a defined scope of work and an estimated price.

Read



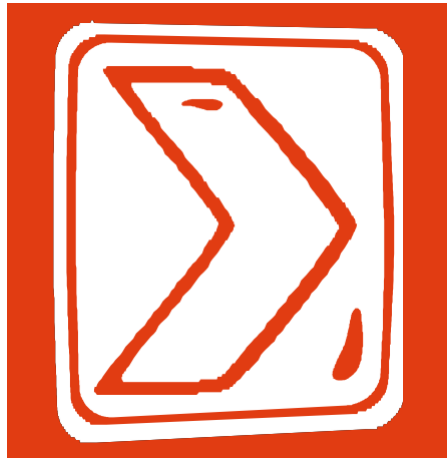
...the scope of work and the clauses in the proposed contract. Look carefully at what is included and excluded for the price estimated. Sometimes you can get an estimate for the entire project, but often you will get a proposal for the design and then a separate proposal (or contract extension) for the construction documents. See the [Design Phases](#) and [Budget](#) pages of our website for more information. Be sure you understand the payment terms.

Question



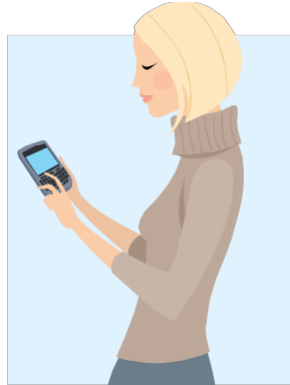
...anything you are not sure about in the proposal. It is important that you are comfortable and agree to the terms of the agreement, including the “fine print”. You should get answers in a prompt, professional manner.

Proceed



...with the proposal. This usually requires your signature on a contract and a deposit or retainer. You will want to have an idea of the timing. How fast will the work progress once you agree to go ahead? Can you provide access to the project site?

Schedule



...a meeting at the site with the architect. The architect will need to do a detailed review of “Existing Conditions” and take measurements. Sometimes you will also need a professional surveyor at this step.

Answer



...questions from your architect as the design progresses. Look at sketches and drawings. Provide feedback. Is the design moving in the direction you intended? Have additional meetings if necessary, but be sure to respond to email or phone calls so that there are minimal delays in the design process.



Choose



...among the design options offered by your architect. Some of these choices are based upon your scope of work and your budget and some may be simply a matter of artistic sensibility. You may need to get a Structural Engineer or other professionals involved at this stage. Your architect can recommend someone with the appropriate expertise. Again ask your architect about timing and about what agency approvals you will need to avoid any unpleasant surprises. At the end of this step you have completed the Preliminary Design phase!

Get



...a Preliminary Bid from a licensed General Contractor. This is usually available with no obligation, but you should consider this person as having the inside track to bid on the job because a preliminary bid takes a considerable amount of time to review the preliminary design drawings and knowledge of the time, effort, and materials that will be needed to get the job done. Remember that the preliminary bid is just a ballpark figure and there could be a lot of unknown factors that would impact the final construction bid. By getting a preliminary bid, however, you can now proceed with some confidence to the next step.



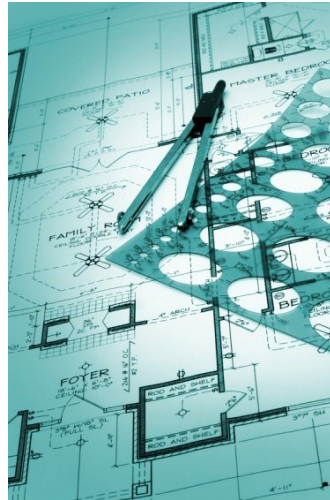
Finance



...your project. Get your loan or see that your resources are liquid and available. Remember that the “soft costs” of architecture, engineering, surveys, permit fees, etc. usually are only 10-15% of the “hard costs” of construction labor and materials. So, the steps so far are the tip of the iceberg in terms of cost. Now is when the major bills will start coming. Be prepared so that you won’t be worried about the invoices.



Develop



...the design. Work closely with your architect, (and possibly your contractor if you already have one), to create the unique aspects of your project. You will want to consider finishes, materials, colors, style, and many other special features that your architect will present as options. You can be heavily involved in making these decisions or you can trust your architect to make them for you, as you wish.



Approve



...the design. Once you have completed the Design Development phase, your architect will ask for a final approval before completing the Construction Documents. Construction Documents (CDs for short) are the expensive part of the architectural process. Much time and effort is involved in documenting (drawing) the design, usually using computer-aided design and drafting (CADD) software. If you have any questions or to consider any other options, do that before you give your approval. Making changes to CDs after the design has been approved can be labor-intensive and expensive.



Review

...the Construction Documents. Sit down with your architect and review the documents. Even if you don't have a background in construction, you will be amazed at how much you can envision by looking at these detailed and interesting plans. Elevations present the vertical view of the building, and plans present the horizontal (or overhead) view. Sometimes the architect will be able to provide 3D renderings, or other views that will help you to envision the finished project.



Submit



...your CDs to the permitting agency. Usually your architect or contractor will handle this step for you, although you may have to attend public or agency hearings and to pay the fees in person to the City or County. This could be a multiple step process, or an over-the-counter quick review, depending on the size and scope of your project. Some projects require Planning Commission approval, Historic Preservation review, Conditional Use Permit, Fire, Health or other Departmental approvals, Environmental Impact Report, Request for Variance and on and on. If your project is large, unusual, or complicated, the more approvals you will need to obtain. (You should have been informed of these issues in the Preliminary Design phase.)



Obtain



...bids from General Contractors. (You may be able to do this step concurrently while you are in the process of permit submission.) Get referrals for contractors from your architect or a friend or colleague who has done a similar project. Get at least 3 bids, and one of those should be from someone your architect has worked with before and trusts.



Compare



...the bids with your architect's help. This is important because your architect may see things that have been left out of a bid in order to get the price down or unrealistic limitations on materials allowances. Be sure you are comparing apples to apples and not just looking at the bottom line price. Your architect can also act as your advocate in negotiating with the contractors. Also ask the contractors about their availability and how fast they can mobilize and proceed with your project once you have obtained the necessary permits.



Check



...references, license, insurance and bonding for the contractor(s) that you are considering. Start by checking with your state's board of contractors to make sure that the contractor's license is in good standing. Be sure that the contractor's insurance is adequate for the size of your project and that they have Workers Compensation insurance. Check with your own insurance agent to make sure that you have proper coverage for the project site. For your own protection, please do not skip this important step.



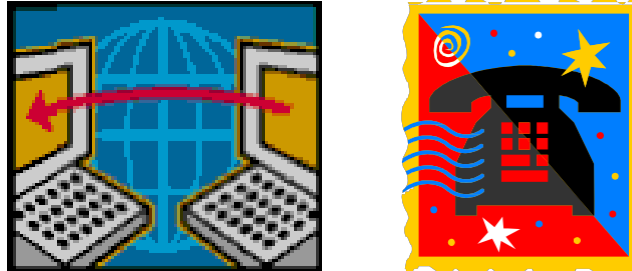
Contract



...with your chosen General Contractor. Listen to your gut and choose the G.C. with whom you feel the most comfortable. Don't hesitate to ask questions about the contract terms, conditions, allowances for materials, etc. Remember that you will be working with this person closely for quite awhile and under stressful conditions. The right G.C. for your project is not always the lowest bidder. (Sometimes you should avoid the lowest bid if it is much lower than other responsible bids.) In construction, as in most other things, you get what you pay for, so reliable, skilled and high quality contractors will not be the least expensive. But they may save you heartache, time and expense in the long-run. Once you have your permits in hand and your contract you are "Under Construction"!



Communicate, Communicate, Communicate!



We are emphatic about this step because this is where the process could go haywire. Your contractor is likely to encounter unanticipated issues. There may be questions about the design and why the architect made certain customized choices. Usually these are easily resolved by having the contractor call the architect and ask for a clarification, or for a detail to be provided or changed. Sometimes the contractor will request a substitution for a material that is not available. Sometimes the building has a deficiency that needs to be corrected before the new work can proceed. And sometimes there is a complex problem that requires you to call a meeting with your architect and contractor to review possibilities. It is rare that a construction project is built with absolutely no obstacles. In fact, it is almost impossible. So, be prepared to take a team approach and call a huddle to make the best decision possible. Do not allow finger-pointing or backstabbing. Just call your team together and work it out. These problems can and will be solved with a collaborative approach.



Inspect



...the work. Ask your contractor to be sure the building inspectors come at the appropriate intervals during the construction. Schedule the architect to perform onsite reviews to see that the construction is following the design intent. This is absolutely worth the small amount of time and expense in the long run. You want to catch any omissions or errors before they get closed up into the walls, ceilings and floors and are difficult to correct. At the end of the construction the architect should schedule a meeting to do a “punch list”, which is a walk-through of the site to check for any small overlooked tasks. It is just a last double-check and the general contractor is usually appreciative to be made aware of anything that was missed. This is a good time to provide feedback on what went well and what could be improved in the process so that the professionals can learn from the experience. It is in everyone’s best interest to come to a satisfactory conclusion that is “signed off” by the client, the architect and the general contractor.



Celebrate!



After the long, arduous process of construction you really should plan a celebration at the end. Even if everything is not unpacked and the landscaping isn't finished, you need to be able to stand back and appreciate how far you have come. Invite friends, neighbors (always curious), family, and don't forget your design and construction team. They will really appreciate it and you will be helping them by providing them with an opportunity to take pride in their accomplishment and hopefully to get referrals to new clients. Congratulations on a successful outcome to your architectural project!



So there you have it! We have tried to generalize the process to make this e-book as applicable to as many projects as possible. Each project, however, will have its own unique set of circumstances. Some of these steps could be streamlined, combined, or skipped altogether.

If you have questions, or just want to know more about how these concepts could apply to your own potential project, please visit the “[Ask An Architect](#)” section of our blog or email us directly at info@kastropgroup.com.

Now you are ready to start on your project.

Good luck from The Kastrop Group, Inc. Architects!

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