



Client Preparation, how to define architect contract terms?
Clients are rarely prepared for the first architect/client site review meeting.

What project criteria is necessary?
What documents are needed?
How has the client prepared a description of their needs?

If you understand your architect needs, and your architect understands your scope of work and the project schedule to complete a design, that's a great start. Contracts are usually defined by phases: Schematic Design, Design Development, Contracts Documents (the permit set), Bidding and Negotiation, and Construction/observation services. In the schematic design phase, we need a lot of information from you because your layout and plan functional requirements are defined by our drawings. Here are some of the documentation requirements to define a clear project :

Site documentation:

1. Site Plan
2. Legal Description
3. any existing blueprints, topography, surveys, geologic / soils reports, grading and drainage

Project parameters:

1. What do you want to build in a specific size? Be clear in your list.
2. What is your Project Budget?
3. Do you have a timetable, - even though this may change?
4. Is there a specific architectural style you like, special interest considerations, sustainable ?

Defining Client needs:

1. A list of rooms, how you live currently (size, style, features)
2. Photographs of things/rooms, particular designs you like
3. Ideas, sketches and drawings of features you like
4. Can you describe your lifestyle?
5. Do you have an open mind for creative change?

Keep it simple, limit your financial exposure to exact project costs and trust your architect's ability. The project difficulties, as they present themselves- are simple tasks to solve. There are always difficulties in any project, so you should expect this. Since this is a long, mutable process, the most critical key ingredient is the communication skill you have with your architect. Only work with signed, written agreements - by licensed professionals in all fields. Their experience and advice saves you on unexpected, additional project costs.

- A. Everything in architecture is temporary. It lasts at best a few decades. That's good news.
- B. The bad news is everything about architecture is rather expensive.
- C. Everything about permit processing is complicated, it takes longer than anticipated, involves way too many people, and is autonomously bureaucratic. Delays for the most part occur in the application procedure, where the architect really has little control over scheduling and review process.
- D. When the building is completed, you may wonder if it was worth all this effort? Always! Together we must have a blend of humor, good understanding invested, and great deal of patience. Nothing good was ever built fast, and everything appears too serious most of the time! If it is not fun, it's not worth obsessing over, then just don't do it! Building a new design is beautiful, extremely valuable, and very rewarding experience on completion, like music- it is Art, frozen in time.

Get it right in early design phases. This saves you huge amounts of money in building, shortens a lot of time and decreases effort. Changes to a project -at any stage- means you need to re-read items B and C. above. Changes are always expensive in the later phases. In renovation, it is always best NOT to consider moving into the house before, or during construction. It's a huge hassle, it costs much more to complete, and it will drive the occupant / inhabitants crazy during construction. Noise, debris, dust, too many strangers all try to intrude and become involved in your home life, every day. Just don't do that.

Good design is expensive in its' creation because it is well thought out and saves on construction dollars later on. In any project, this creative design solution saves on costs by design, especially during building. If it looks too complicated and you don't understand it, don't build it! Elegance is a complicated solution stated simply. The how and why is defined by an extensive, competent professional experience.

Some architects will not work under a fixed budget because too many variables exist, for instance in the selection of finish applications. I can double a budget of the same floor area simply by finish costs. As stated earlier, a capable design saves in building methodology, in time and in construction. Great design is easy to complete, which for the General Contractor building it saves money, time and effort. No budget is ever accurate, because unforeseen circumstances will occur on every project.

In Malibu, a difficult plan check review process, the average permit may take up to two years to obtain, - this is just for the construction permit. Why? A lot of other review agencies are very particular about what gets built, how, and where. Along with a host of curious neighbors a lot of opinions need assuaging. Anyone ever offer you a fixed, guaranteed price on a new car you'd like to buy, - but in four years from now? The same applies to construction costs and bids. It depends on the competency of negotiation ability of your architect, the timing, on market economy and on the trust of the bidding contractors.

Pulling permits is outside of the control of almost any architect, unless it is repetitious and if there is a familiarity towards the applicant and processing hurdles. We know many review, plan and corrections personnel - and that's a distinct advantage in the processing of an application. However.... - like nuts on a fruit tree, they show up everywhere, even across the counter at Building and Safety reviews. The permit timetable and code procedures are lengthy and infused with many different sub-tasks. All need resolution, sometimes with many different other consultants.

Be clear about your needs. Planning entitlements, variances, surveys, Title 24 energy calculations and specifications, geological, soils and grading and drainage requirements, modifications to zoning, permit expediting, cost estimate take-offs, interior design, lighting, mechanical, electrical, HVAC, home theater systems integration, finishes selection - even specifications writing are separate tasks and usually not part of your architect agreement. Keep it simple.

I recommend starting off with a flat-fee preliminary design, a single page agreement. Once the scope of work has been clearly identified, proceed with a full, standard AIA Owner Architect agreement with a defined scope. The more time you give yourself and your architect for obtaining a design and permit, the better your project will become.

Thank You!

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architect