

Project Planning Checklist

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Project Planning Checklist

Introduction

Thank you for downloading this Project Planning Checklist. I hope that you will find it useful in tracking down the information you will need to start your project.

Originally I prepared this Checklist to use in my own architectural practice for my initial meetings with my clients. It provides me and my clients with a single document to record the critical information about their projects.

I realized that these same questions are often asked by my clients before they hire an architect. Consequently, I expanded the checklist to include sections about determining a construction budget and finding and selecting an architect.

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General Information

- Project Address: _____

_____, California _____

- Jurisdiction: The jurisdiction will be the City you live in, or if you live in an unincorporated area, the County you live in.

Most of the information about the Assessors Parcel Number, Block Number, Lot Number, and Zoning district will be available from your Jurisdiction's Planning Department. The Residence Type should be self-evident. If not the Building Department can tell you.

- Assessors Parcel Number: _____
The APN is a unique number used by the County Assessor to identify your property. It is different from your address. The APN is often required when you apply for a permit.

- Block Number: _____
The Block Number is an identifier used in some Cities, particularly San Francisco, to locate a property in the official maps of the City. The Block Number is often required when you apply for a permit.

- Lot Number: _____
The Lot number is an identifier used in conjunction with the Block Number in some cities, particularly San Francisco, to locate a property in the official maps of the City. The Lot Number is often required when you apply for a permit.

- Zoning: _____

- Residence Type:
 - Single Family – Detached
 - Single Family – Attached
 - Multi-family – Condominium
 - Multi-family – Tenants-in-common

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Property Information

- Lot Size: _____
- Lot Area: _____
- Existing House Area: _____
- Number of stories: _____
- Building height: _____
- Existing Set Backs:
 - Front Set Back: _____
 - Back Set Back: _____
 - Side Set Back (left): _____
 - Side Set Back (right): _____

The existing set backs will be compared with the code required/allowed set backs to determine the extent to which your property can be expanded.

Alteration Plans

- Identify the nature of the problem you are solving. Is the problem about:
 - lack of light?
 - not enough storage?
 - difficult circulation patterns?
 - insufficient space?
 - something else? _____

- Are you planning to:
 - Remodel (internal changes only)
 - Add on (expanding the area of the house)
 - Adding a New floor or level
 - Expanding into the yard
 - Enclose a garage
 - Enclose a porch
 - Develop the basement

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Alteration Plans (continued)

- Develop the back of the garage (San Francisco Marina Style houses)

- What spaces are being remodeled (altered)?
 - Kitchen
 - Bath
 - Master Bath
 - Other – List: _____

- What spaces are being added?
 - Master Bedroom
 - Bedroom
 - Office/Study
 - Kitchen
 - Bath
 - Master Bath
 - Other – List: _____

Budgeting

Available Funds:

- Are you planning on living in the house during construction?
 - Yes
Are you sure about that?
If you are remodeling you Kitchen, budget more for food during construction – there will be take out.
 - No
Where will you live during construction? _____
Have you budgeted for the expense? _____

- What is your budget? \$ _____
If you have money set aside, or are procuring financing, I recommend the following breakdown of expenses:

A. Total available budget: \$ _____

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Budgeting (Continued)

B. Reserve 10% for unexpected expenses:

(Total x 0.10 = reserve): \$ _____

C. Allow 6% for plan check and permits:

(Total x 0.06 = city fees): \$ _____

D. Allow 15% for architects/engineers fees (for residential work this will vary from 10% to 20% depending on the size and complexity of the project. Small projects are not necessarily less expensive than large projects.):

(Total x 0.15 = prof. Services): \$ _____

E. Are you living off-site during construction? Allow some money for this: \$ _____

F. Add the Reserve number, the city fees number and the professional services number. These are your "soft costs".

From above: B + C + D + E = \$ _____

Subtract the soft costs from the total available budget. This is your actual construction budget.

A - F = Actual Construction Budget: \$ _____

Likely Construction Costs:

- Will your construction budget be sufficient for your project?

The following information is from [CalFinder.com](http://www.calfinder.com). My experience is that costs in the San Francisco Bay Area will run about 20% higher than the amounts shown here. (For a description of San Francisco Bay Area construction costs see this article:

<http://www.remodeling.hw.net/2013/costvsvalue/division/pacific/city/san-francisco--ca.aspx>) Also note that these are AVERAGE costs. It is possible to build for less, though if you want nicer finishes, it is very easy to spend more.

Average National Costs Per Square Foot:

- Repair or spruce up: \$15 - \$40
- Repair or remodel: \$20 - \$40
- Substantial remodel: \$50 - \$200
- Rehabilitation: \$60 - \$250
- New addition without plumbing: \$100 - \$150

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•Budgeting (Continued)

- With bathroom: \$125 - \$200
- With kitchen: \$250 - \$300
- With both: \$250 - \$350
- New deck with steps and rails: \$20 - \$30

Here are the national price averages and ranges for different remodel projects:

- Kitchens - Average National Remodel Price: \$26,888; Average price range: \$15,000 - \$45,000
- Bathrooms - Average National Remodel Price: \$11,605; Average price ranges: \$7,000 - \$20,000
- Living Room Additions - Average National Remodel Price: \$70,000; Average Price Range: \$50,000 - \$90,000

- Estimating your construction costs.
 - Calculate the floor area of your remodel or addition. The floor area is the Width x the Length:
width _____ x length _____ = _____ square feet
 - Multiply the floor area, calculated above, time the construction costs listed above. If the exact project type is not listed use the one most like what you have planned.
Floor area _____ x construction cost _____ = \$ _____
 - Compare your construction budget from page 4 with your estimated project cost above.
 - Is your budget larger than the estimated project cost?
 - Yes. Move on to finding an architect.
 - No. Consider your options:
 - Can the project area be smaller?
 - Are less expensive finishes acceptable to you?
 - What are your priorities? What is most important?
Can you reduce the scope of the project?
 - Can your objectives be achieved with a smaller project size?
 - Can your objectives be achieved over time in several incremental or phased projects?

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Budgeting (Continued)

Often an architect or contractor can help you sort out these questions in one or two meetings. But be prepared to compromise.

Finding + Selecting An Architect

- Ask your family, friends or acquaintances for referrals to architects they have used. Find out their website addresses. You can do this by Googling their names or calling them and asking.
- Do an internet search for architects in your area with your project type as one of the search terms (Remodel, Kitchen Remodel, Addition, Modern, Small space design, or whatever you need.)
- Check sites like Houzz.com or Servicemagic.com.
- Check the websites of the first 10 or so names you get as referrals and internet search results.
 - Do you like the work you see?
 - Do you like the way they write about their firm and their work?
- Narrow your list down to 3 or 4 and contact them by phone or email and quickly describe your project and ask if they take on projects like yours. Mention how you got their name, especially if was through a referral.
 - If they say “yes”, set up an appointment to meet them. I prefer to do this meeting at the prospective client's house so I can see the site and house. Other architects prefer to do this meeting in their offices.
 - If they say “no”, ask them if they have a colleague who does take on projects like yours whom they might recommend.
- Talk to a couple of architects.
 - Ask how they work. What is their process like?
 - Ask them to describe their “style”.
 - Describe your problem to them and what you are thinking of doing.
 - Tell them what your total budget is and what your construction budget is.
 - Ask them to what extent they will be involved in your project? Many architects have staff who will be involved. You want to know if the person you are interviewing is a figurehead or “in the trenches”.

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Finding An Architect (Continued)

- If you don't know, ask them if they have done work in your city.
- If they bring a portfolio or brochure, look through it and listen to how they describe the projects and the experiences with the clients.
- Ask them for references.
- Do you like them? Do you "hit it off"? Are they pretentious? Do they seem bossy?

- After you have spoken with several architects, call one or two back and ask them for a proposal. If you are getting proposals from more than one architect, let them know.

- When you receive the proposal, let them know you have received it and when you will be making your decision.

- Review the proposal(s). Are you looking at Apples and Oranges, or Apples and Apples?
 - Does their description of your projects sound like they understood what you really want?
 - Do they include the same services?
 - Do they exclude any services?
 - Do they include a proposed schedule?
 - How is it structured? Hourly? Time + Expenses? Flat Fee? Percent of Construction Cost? Some mixture of these?

- Remember, the proposal is just that, a proposal. If you don't feel comfortable with their description of your project, if you feel the schedule is wrong, if you feel there are too many, or not enough services included, or if their compensation is too high for your budget, and you are really interested in working with the architect, let them know. Discuss it with them. Ask them to revise their proposal.

- Select your architect based on:
 - Do you like and trust this person? Working with an architect is kind of intimate in that you will be discussing your hope and dreams and finances and how you really live. You need to be comfortable with whoever you select.
 - Do you like the work they've done in the past? Do you think you they can listen to what you say and adjust appropriately?
 - Are you comfortable with their proposal, their services, schedule and compensation?

- Sign an agreement / contract with your selected architect. In California, a contract must include the following to be "binding":
 - A description of the services – what the architect will do.
 - A schedule – when the architect will do it.

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Finding An Architect (Continued)

- The compensation – what you will pay the architect and when.
- Names + signatures of both parties.

- I also think an agreement / contract should include the following:
 - A description of the owner's responsibilities
 - A termination clause that works both ways.
 - What happens if there are changes to the project or schedule.
 - Understanding that drawings are not products but "instruments of service", tools used by the architect to describe the design to the city and contractor.

Now that you have completed this check list, you have:

- the critical information about your house and lot
- the start of an idea of how to solve the design problem
- preliminary thoughts about the total budget and the construction budget
- and an architect who will be working with you.

From this point on your architect will be working with you and will be leading you through the processes of programming, schematic design, design development, construction documents, permits, bidding, and construction.

Good luck!