

PROJECT WORKFLOW

We look forward to collaborating with you on the design and construction of your Project.

We pride ourselves in following an organized Project Workflow to keep your Project moving forward.

This list will serve as a guide to completing the Project Phases.

Please be aware that attempting to expedite or circumvent the Project Workflow may result in delays and additional fees later in the Project.

Due to the large amount of coordination with all team members, a timeline for completion of the Project varies based on when we receive approval to proceed and receipt of required Pre-Design information.

SCOPE OF WORK PHASE

1. Client completes a Request for Proposal Form.
2. Client provides us with any additional site information and a Program.
3. We will set up a Scope of Work Meeting to review your Request for Proposal and Complete the Scope of Work Form.
4. We will recommend Consulting Engineers as needed. (Unless they will be provided by the Client)
5. We will complete and email a Service Agreement describing services and fees based on the Information provided in the Request for Proposal or Scope of Work.
6. After the Service Agreement is approved, the Client must submit a 'signed' copy to our office via email or mail.
7. Our accounts department will email the Client an invoice for the retainer payment.
8. Work will start after receipt of the retainer payment.
9. A Project Manager will be assigned for all communications to ensure Workflow is being followed.
10. *Allow 1-2 weeks for researching, scheduling, information gathering.*

PRE-DESIGN PHASE

1. A Survey or an existing conditions Site Plan must be provided by the Client for work to proceed.
2. If neither a Survey, nor existing conditions Site Plan is provided, the Client may need to hire a Licensed Surveyor.
3. Contact us if you need help finding a surveyor and we can assist in obtaining quotes for you.
4. The Client must provide base plans of existing buildings.
5. A point cloud scan of the building may be required. If plans for the existing building cannot be provided.
6. We may require additional field visits to the site to gather photos and data to document the building.
7. We are unable to edit CAD files or PDF files of plans created by others, therefore we will need to model the existing conditions prior to the start of Schematic Design.
8. The Client is required to provide us with a Program prior to the start of Schematic Design.
9. The Client is required to provide us with an Equipment List with all Specifications.
10. We can assist, for additional fees, with the creation of a Program and Equipment list if the Client cannot provide.
11. *Allow 2-4 weeks for Design and Client Approvals.*

SCHEMATIC DESIGN PHASE

1. Based on the Client provided information in PRE-DESIGN PHASE, we will start Schematic Design.
2. This may include the following:
 - o Schematic Site Plan (if required)
 - o Schematic Floor Plan
 - o Schematic Elevations (if required)
3. We will email the first Schematic Design to the Client for review.
4. A meeting is recommended to review the design. Meetings may be additional fees.
5. After review of the first Schematic Design, we will make Schematic Design Revisions (SD-2, SD-3...) and re-email plan for approval.
6. The first schematic will not be perfect. We can continue to revise your project. It is common for Schematic Design to take on iterations (typically 2-3) and meetings to complete.
7. Design revisions requested after the Client approves the Schematic Design will result in additional fees later in the Project.
8. After the Client approves the Final Schematic Design, we may proceed with Construction Documents and Consulting Engineers.
9. We can provide Interior Design and Rendering services for an additional fee.
10. *Allow 2-8 weeks for Design and Client Approvals.*

SITE PLAN/SPECIAL LAND USE APPROVAL

1. Most new buildings or exterior renovations require Site Plan Approval and/or Special Land Use.
2. The Local zoning ordinance/Local Planner will need to be consulted for Site Plan/Special Use Approval Process.
3. Most projects affecting the site require a Civil engineer. If you do not know a Civil Engineer, we can gather quotes.
4. This process varies by local authorities and may require site engineering, time, and fees to obtain approval.
5. *Allow 3-9 months for Planning Meetings and Approvals depending on the local AHJ.*

CONSTRUCTION DOCUMENT PHASE

1. After the Client or Local Authority approves the Schematic Design, Construction Documents will begin.
2. We will use approved Schematic Design and/or Site Plan Approval Plans to complete Architectural Plans for Building Permit.
3. Final Plans will be provided for Client approval prior to submitting for Building Permits.
4. *Allow 4-8 weeks for drawing creation, code reviews, and researching.*

CONSULTANT/ENGINEERING PHASE

1. Furniture, Fixtures, & Equipment (FFE) plans must be provided prior to starting engineering to avoid additional fees.
 2. If Engineering is required on the Project, their work can begin after the completion of Architectural Plans.
 - a. Mechanical Engineer: Required for HVAC load study and duct sizing.
 - b. Mechanical Engineer: Required for plumbing load and pipe sizing.
 - c. Electrical Engineer: required for new electrical services & services over 400 amps. Electrical Engineer can start after Mechanical Engineering.
 - d. Structural Engineer: Required for ANY structural modifications & can start after Mechanical Engineering.
- Allow 4-8 weeks for drawing creation, code reviews, and researching.*

PERMITTING PHASE

1. The Client is responsible for completing Permit Applications and paying any associated fees to the local authorities. We can assist in the completion of application(s) upon request for an additional fee.
2. If Health Department or Special Approval(s) are required, we can assist in the completion of application(s) upon request for an additional fee.
3. Our permitting service does not replace a plan expeditor.
4. If required, plans can be printed and/or shipped and will be added to invoices. (Refer to Terms and Conditions for additional fees).
5. When received, plan review comments must be submitted, via email, directly to your Project Manager (PM) for any plan revisions.
6. We will implement revisions and provide them to you, and you can print and re-submit as needed.
7. Upon Approval of the Permit Plan, you can obtain your permit and start construction.
8. *Allow 2-8 weeks for local authority reviews.*

CONSTRUCTION PHASE

1. Any work after the Permit is approved will be invoiced at hourly rates unless otherwise noted in the Service Agreement.
2. *It is important that only authorized representatives (Client or G.C.) submit all Requests for Information at this time as hourly rates may incur without Client Approval.*
3. Bidding & General Contractor (G.C.): We will need to understand the delivery method and if bidding to multiple General Contractors. Requests for information or details may be submitted during the bid process resulting in additional fees.
4. During Construction, we may need to respond to Requests for Information (RFI), review Shop Drawings submitted for review or approval, provide on-site meetings, review unforeseen conditions, or provide additional detailing. To avoid delay, work may proceed without your prior approval.
5. *Varies on length of construction.*

RENDERING SERVICES

1. We can bring your project to life by providing colored 3-D views of your project.

INTERIOR DESIGN SERVICES

1. We can bring your project to life by selecting the finishes for your project.
2. We can provide Mood Boards, Finish Selection, and Source Materials.

