GOOD, BETTER, BEST
WHAT MAKES A GREAT DESIGNER

⭐⭐⭐
GOOD Has the necessary expertise to do the job.
- Possess the appropriate industry credentials and is legally qualified to stamp drawings.
- Creates a building or space that is attractive.
- Can help define the project timeline and budget.
- Can ensure a project is built to code and the specifications set forth in the plans.

⭐⭐⭐
BETTER Acts as a partner in the process and is committed to the project goals.
- Presents a transparent and clearly defined Scope of Work and sets realistic expectations.
- Adheres to the timeline and budget and is accountable to the terms of the agreement.
- Speaks the developers language and communicates in a transparent and timely manner.
- Uses an iterative and collaborative approach to planning and problem solving.
- Leads community engagement sessions and advocates for the project at public hearings.
- Has impeccable knowledge of zoning and code laws, and other regulatory requirements.
- Incorporates expertise of current products, building techniques, and design trends.
- Designs functional and creative projects within all constraints.
- Helps manage the timing of construction sequences to save time and money and ensure safe, efficient, and properly maintained building systems, fire ratings, etc.
- Helps developer maximize square footage and add to the value of the property.
- Creates a space that respects the context of the place.

⭐⭐⭐⭐
BEST Serves as a facilitator and advocates for development that serves the existing community.
- Practices and responds to authentic community engagement.
- Advocates for accessibility, inclusion, and sustainable development.
- Final product enhances the community and is accessible and welcoming to all.
- Helps neighborhood retain or increase in value without displacing existing residents.
- Preserves the positive history of a building or place by designing spaces that are supportive of the culture of existing residents.
- Finds solutions to address the needs of multiple constituencies, including the users of the building or space, its neighbors, and the city at large.
- Has a positive and cohesive influence on the built environment.
- Refines the plural voices of the community into a combined, shared objective that also meets the developer’s needs.
QUESTIONS FOR INTERVIEWING DESIGNERS

During the interview process, you are trying to determine whether the person or firm:

→ Has the expertise and experience you are looking for.
→ Can deliver your project on time and within budget, and will work with you in a way that's compatible with your needs, personality, and preferences.

The questions below can help guide your conversation and decide if the designer is the best fit for your project.

What is your design philosophy?
Here's the chance to talk about the vision this architect will bring to your project. Whatever is important to you should be important to your architect.

→ Is your focus on sustainability? Preservation? Cost effectiveness?

What is your design process?
Most architects follow an established path for each project, although that process varies slightly from firm to firm and project to project.

→ What process can I expect throughout this project? What are the project milestones?

What projects have you done that are similar to this project in type, size, and complexity?
You want to make sure the architect is comfortable with the size and complexity of the project you're proposing.

→ Do you have portfolio examples that are similar?

Do you foresee any problems with this project?
If you're dealing with a difficult site, a limited budget, or other complications, be up front. How the designer reacts to these challenges will tell you whether they're suited for the project.

→ How would you solve these problems? Have you had similar experiences in the past?

Will I be working directly with you or someone else on your team?
If it's a large firm, you will want to clarify who will be designing your project, and who your contact person will be.

→ What is the experience and style of the person I will be directly working with?

How much time will the design process take?
Be sure the architect has the time to devote to the project and can complete it within your timeline. Remember, the architect can account for their time, but not unexpected delays like a client's indecision or a contractor's scheduling conflicts.

→ Will you be available to consult with my contractor throughout the process, if necessary?
→ Can I expect a timely response to all inquiries?
What type or form of design deliverables can I expect?
The type of deliverable is not an indication of a “better” architect, but if you’re more comfortable with one than the other be sure to bring this up.

→ Will you present 3D digital renderings of the project or 2D plans and elevations?
→ If appropriate for the size of your project, you might also want to ask about Building Information Modeling (BIM) or other types of digital models or presentations.

Can you provide references for projects you’ve worked on that are similar to mine?
The designer may be able to provide professional references from past clients or even show you buildings they have created or collaborated on locally.

→ Do you have any work nearby that I could view?
→ When you call their references, make sure to ask specific questions. Did this architect save you money? How did he or she handle conflicts? Was the project completed on time? What value did they bring to the project?

Which parts of the design and development process will you specifically be accountable for?
Be sure you’re clear about which parts of the process you or someone else on your project will be responsible for versus your designer for tasks like securing permits or final certifications. Make sure both of you understand what is expected of the other.

→ How will we divide responsibilities? How can I help you complete your tasks on time? What do you expect me to handle?

Should I expect any additional costs along the way?
This will help you make sure the designer understands what is included in your Scope of Work and your contract or agreement. This portion of the conversation should include a thorough discussion of budget and costs.

→ What extra costs might you predict and why will they occur? How could we avoid these costs? Are there any suggestions you could make to cut costs?

What is your fee, and how is it structured?
Don’t leave the interview without a firm understanding of what the architect’s fees are, what they are based on, and how and when you will be billed.

→ Will I pay for all services at the end of the project? Or pay for half at a predetermined midway point?

The information gathered from these questions will help you decide which designer to hire, but you may not want to rely on their answers alone. You should also ask yourself a few questions.

Did they provide honest, thorough answers that were easily understood? □ Yes □ No
Do they understand the size, complexity, and scope of your project? □ Yes □ No
Will they take pride in the project and see it through to the end? □ Yes □ No
Will they act as a partner and treat you with mutual respect? □ Yes □ No
Can you trust them to deliver what they promised on time and within budget? □ Yes □ No
Did you have a frank discussion about your budget? □ Yes □ No
SCOPE OF WORK

A Scope of Work establishes clear expectations for a project, so all parties understand what work each party will perform and deliver, when it’s due, and the agreed upon price.

Briefly describe your development practice, including your brand and core values, if applicable:

________________________________________________________________________
________________________________________________________________________
________________________________________________________________________

Explain the project for which you are currently seeking design services:

________________________________________________________________________
________________________________________________________________________
________________________________________________________________________

What is the expected end result of your development project? Please check all that apply and include a brief description.

Project Use:

- Single-Family Home
- Duplex
- Multi-Unit Residential
- Mixed-Use
- Commercial Building (Offices, Retail, etc.)
- Light Industrial (Small-Scale Manufacturing)
- Industrial
- Community Space
- Park

Construction Type:

- New Construction
- Addition
- Historic Preservation
- Adaptive Reuse
- Other

Description:

________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
Provide a timeline for execution and completion of this project. Be sure to include when responses are due, dates for meeting any applicable milestones along the way, and a project deadline. Write milestone dates on the lines for all that apply.

**PROJECT MILESTONES**

- Bids or Proposals Due
- Purchase of Property
- Create Project Schedule
- Complete Schematic Design
- Complete Design
- Complete Drawings for Permitting to Secure City Approvals
- Close Financing
- Complete Construction Documents
- Finalize Architect’s Involvement in Construction Administration
- Complete Showroom
- Open Project

What are the primary priorities you’re seeking in the project? Think about what you want your building to be exceptional at and let that guide your selection process. Number in order of importance.

- Economic (lowest possible construction costs and simple design)
- Low Maintenance (quality construction details and energy efficient design)
- Inclusive (adheres to inclusive and/or universal design principles)
- Aesthetic (striking and unique design)
- Sustainable (design that is good for the environment)
- Cooperative (created with contractors you regularly work with)
- Unique (custom design that requires lots of research to create special solutions)
- Other

Do you know how much you can afford to spend for the services you’re seeking? It can be a range, to leave room for discussion and negotiation, but should be realistic in terms of capacity and the scope of the project.
Describe how you would like designers to respond to your RFP / SOW. Be sure to indicate what you expect them to include in the response, when it's due, and how to submit it.

Many developers typically ask that a portfolio of relevant prior experience, firm overview (mission / values), firm structure and key staff, anticipated consultants, fee proposal, and project timeline are included. Describe what you would like to see from your designer.

Add details about your development team’s primary point of contact. It is important to include contact information so that interested designers know who to send their proposal to.

Name

Role

Email

Phone

Be prepared to share any additional information that may help the designers understand what you’re looking for. This could include attaching examples of existing marketing materials, collateral, your logo, a link to your website, your real estate portfolio, etc.
Stephanie White Architects – New Client Questionnaire
Designers often also ask some clarifying questions to determine if the project is a good fit for them. Here is an example of a New Client Intake Form from Architect Stephanie White.

SWA

NEW CLIENT QUESTIONNAIRE

Name
Address
Phone

How did you hear about SWA?
Have you worked with an architect before?
Have you done any kind of renovation or construction project before?

*About licensed architects: health, safety & welfare of the general public, architectural drawings are contract documents in the event of a dispute, all other architectural services, etc.

PROJECT

Is the project a home, multi-family building, or other?
Is it an addition, renovation, or new build?
How many square feet is the project?
Do you have a contractor that you’d like to work with?
What’s your desired timeline for construction?
Do you have arrangements for relocating out of your home?
What is your budget for construction?
What is the problem you are trying to solve with your project, or the driving purpose?
What was it about SWA that made you think it would be a good fit?
Would you like to schedule an in-person meeting, where I get to know you, your wants and needs, and take a look at the project and / or your ideas? Based on that information I can write a proposal for my services if we decide to move forward.
PREPARING FOR THE FIRST MEETING WITH YOUR DESIGN TEAM

The design process starts with discovery. To realize your vision and help achieve your goals for the project, the designer needs to fully understand what they are. You can expect a lot of questions about what you need and want, so the entire team can be on the same page about constraints and opportunities in the design. To best prepare for those early conversations, please detail your answers to the questions below:

What is the intended use of the space(s)? Be sure to include each individual area in and around your building, including any residential or commercial units and outside spaces.

What do you know about the residents, businesses, employees, or customers who will occupy the space(s)? Provide as much detail as you can about your target end user.

What functions will be performed in each space? Will apartments need individual washers and dryers, for example? Will commercial tenants require specific areas or zones for point of sale, food preparation, or employee meetings? Can some of these activities share space?

How much room do you anticipate end users needing for each activity they will perform?
Will the space need to accommodate any short- or long-term future plans or changes, such as project phasing, future development, sustainability goals, or evolving tenant needs?

Which will you use to make decisions and measure the success of this project?

- [ ] Bottom Line  
  - financial outcome

- [ ] Double Bottom Line  
  - financial outcome
  - social impacts

- [ ] Triple Bottom Line  
  - financial outcome
  - social impacts
  - environmental outcomes

What are the primary priorities you’re seeking in the project? Think about what you want your building to be exceptional at and let that guide your selection process. Number in order of importance. This should be consistent with your agreed upon SOW.

- [ ] Economic (lowest possible construction costs and simple design)
- [ ] Low Maintenance (quality construction details and energy efficient design)
- [ ] Inclusive (adheres to inclusive and / or universal design principles)
- [ ] Aesthetic (striking and unique design)
- [ ] Sustainable (design that is good for the environment)
- [ ] Cooperative (created with contractors you regularly work with)
- [ ] Unique (custom design that requires lots of research to create special solutions)

Other
You can also help your designer begin working on the project by clearly and quickly articulating your vision. Consider bringing the following to the first meeting:

- Images of what you like and don't like. Use magazines, newspapers, advertisements, and the internet for inspiration. It helps if you can say what you specifically like about the image or specifically what you don't.

- Any pictures, floor plans, or other documentation you have for the property or building, both inside and out. Include specific boundaries of the property and any zoning or site restrictions you may already be aware of. Discuss aspects you would like to preserve or change.

Share existing assets, documentation, or constraints that are relevant to the design of the project. This could include whether you’re still seeking site control, if the building or lot is in a historic district, or anything else that could impact material selection, timeline, or budget.

Documents:
- Property Survey
- Legal Property Description
- As-Built Drawings
- Geotechnical Reports
- Environmental Reports
- Other ____________

Information:
- Ownership Information
- Zoning Designation
- Historic District Designation
- Sustainable Objectives
- Other ____________

The documents listed above are required to start most projects, and are (by AIA contract) the client’s responsibility to provide. Prospective developers may not have all of them when selecting a designer, but will have to obtain them eventually. The information items listed above would all be helpful for a prospective developer to be aware of or thinking about prior to hiring a designer, though they can be discussed throughout the process.
HOW LONG WILL MY PROJECT TAKE?

Our sample project is located in the zone B4-H (Business 4 Historic).

Building permitting takes 2-4 weeks.
Historic District Commission approval takes a minimum of 3 months.
The sample project is located in Zone B4-H (Business 4 Historic). We don’t need to make any exterior changes, so we won’t have to go through a historic approval process.

1. Approximately how long will permit approvals for the sample project take if we DON’T make exterior changes?
   ________ Months

2. Approximately how long will permit approvals for the sample project take if we DO make exterior changes?
   ________ Months

3. How long can you expect permit approvals to take for your own development project(s)?
   ________ Months
THE DEVELOPMENT TOP 10

Questions developers should ask and answer about their projects before moving ahead.

1. Can the market support this idea and does it make sense?

2. What populations are we serving and why?

3. What housing or retail is most needed and how do we attract that?

4. What are the demographics, including age, income level, and education levels of the area?

5. What is the competitive business climate like in the area?
6. What does the existing real estate landscape look like and what’s missing?

7. What are construction costs in the area, including labor?

8. What is the environmental history and current condition of the property?

9. What are the daily traffic counts in the area?

10. How much income can the property realistically produce?

Data obtained through appraisals and market studies will not sufficiently inform a neighborhood developer on all of these items. Other sources include, but are not limited to: city government, community organizations, residents and community groups, public libraries, and databases including Demographics Now and Business Decision (check what’s available through your public library).
TRY BEFORE YOU BUY

Thoughts on Site Selection

The process of development often starts with site selection, i.e. choosing the structure, lot, house, or place you want to build on, construct, or remodel. Often, new developers set their sights on a specific area or building first, and then jump through hoops to make their real estate project work. They may visualize the beautiful redesign of a historic building in their neighborhood or the erection of a cutting-edge office building on a vacant lot in the area.

However, falling in love with a place or building before understanding whether it’s right for what you’re trying to do, or whether what you’re trying to do is even allowed on that site, means you’ll spend a lot of extra time, money, and resources. In the end, it may also mean what you’ve developed will never reach its full potential. Recall the old and true adage, “location, location, location!”

Whenever possible, your purpose or desired outcomes for the project should drive the selection, purchase, and design of the lot or structure. For example, if you want to develop a small commercial building near your neighborhood, you need to research the market rate of retail rents in the area to make sure the numbers align. This is especially critical if you’re seeking third party funding or investment. You also need to understand what uses are allowed on the blocks or streets you’re considering.

If the building you love falls in a commercial area, you may not be able to lease to the friend who sculpts metal or makes wooden furniture as you intended, as these uses may be considered light industrial and not be allowed without special permission. If you’re planning offices or a co-working space, you have to assess if the existing infrastructure, including electricity or broadband, meet the needs of future tenants or if those amenities need to be built in. If so, how much will that cost? These are things you need to know before you sign a purchase agreement or put down a deposit, particularly if you’re counting on that designer friend or technology entrepreneur to lease space in your new building.

While it does not address market conditions such as consumer demand or rent tolerance, the Zoning and Code Exercise at the end of this section will help you understand the compliance part of the due diligence process required in thoughtful site selection and design for real estate development projects. It also illustrates the various levels of regulatory approvals required to open your building to tenants or the public and make your vision a reality.

Before residential or commercial tenants can move in, you’ll have to acquire a Certificate of Occupancy (COO) from the municipality governing your location. A COO is essentially a stamp of approval for complying with all city- and state-level zoning and code requirements. In addition to zoning compliance, a COO will also require final inspections and approvals of the fire, mechanical, electrical, and plumbing systems, and potentially an inspection by the health department, based on existing code regulations.
All of this takes time and should be factored into your plan accordingly. A professional designer is trained to help with these often complicated processes.

To best prepare for your development project, ask yourself or your designer the following questions:

What will you need to provide the city to obtain the necessary permits and certifications?
- How long will each step take? How will this affect the timing and budget of your project?

What are the specific zone allowances for the selected lot or structure?
- What was the prior use of the space? Did that use comply with the zoning laws?
- Are you changing the use? What additional approvals are required to do that?
- Do the zoning laws for your area dictate what kind of windows or roof you can have?

What plans or documents are required in order to obtain proper building permits?
- Is environmental testing and approval required for this site or building? What are the code requirements in your city?
- How many parking spaces and bathrooms are required for this type of building?
- What kinds of signs or awnings are businesses allowed to have in this area?

Your designer can help you interpret these regulations and ensure compliance before you start designing and building. This will ultimately save time and money, increasing profits on the project by increasing the pace of required approvals and eliminating or reducing the need for costly revisions. To get a basic idea of how this process begins, practice with the following exercise.
WILL YOUR DEVELOPMENT...?

A checklist for determining the long-term success and impact of your development project.

<table>
<thead>
<tr>
<th>Description</th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>Generate sufficient cash flow</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Have low vacancy</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Become a lasting community asset</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Prevent resident displacement</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Fill a gap in the market by offering appropriate goods, services, housing, or recreation</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Enhance the character of the neighborhood and promote a vibrant, active environment</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Contribute to the economic and social stability of the community</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Serve all stakeholders including residents, businesses, and municipalities</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Be economically and environmentally sustainable</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Contribute architecturally to the landscape of the place</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Look great and feel safe</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Use quality construction techniques and materials, and durable finishes</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Provide a great user experience for residents and visitors</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Be physically accessible and welcoming to all</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Be appropriately priced for the neighborhood, and accessible for ownership or rental</td>
<td>☐</td>
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</tr>
</tbody>
</table>
ZONING & CODE EXERCISE

Say you want to convert this existing storefront into a new restaurant. Before you can even begin the design process, you need to know the constraints of the site, which are governed by zoning and code.

Zoning vs. Code

**Zoning**

Each city has specific zoning requirements that regulate the type of structures that can be built, property line setbacks, and parking requirements. There are also special zones for designated areas known as Historic Districts or Business Districts, such as Main Street Overlays, which have more rules that must be followed.

**Code**

The state enforces codes which govern how you build. A few of the many items and systems that codes address are accessibility, fire suppression, and plumbing. The codes are updated every few years and cities adopt them at different times. You will need to check with your city to find out what codes are currently in effect in your area.
Find Your Zone

Every project must be in compliance with local building, mechanical, plumbing, and electrical code. Go to the city and/or state website for your project location to find the most current version of them (we've included Michigan and Detroit below). Write the year and reference number in the corresponding space.

Michigan Code: https://www.michigan.gov/lara/0,4601,7-154-89334_10575---,00.html


<table>
<thead>
<tr>
<th>Building Code:</th>
<th>Plumbing Code:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mechanical Code:</td>
<td>National Electrical Code (NEC):</td>
</tr>
</tbody>
</table>

Now let's practice with a local example. For this exercise, the project location is 1811 Parker Street, Detroit, MI, 48214. The intended use is a new restaurant.

1. Use the zoning map on the next page to determine the designation for this site.
2. Is the building in a historic district?  □ Yes  □ No
3. If yes, do you intend to make changes to the exterior?  □ Yes  □ No
4. Is your intended use for this site permitted (consistent with what's permissible in that zoning district) or conditional (special use granted through a required public hearing)?
Business Zoning Districts

B1 - Restricted Business District
B2 - Local Business & Residential District
B3 - Shopping District
B4 - General Business District
B5 - Major Business District
B6 - General Services District

Note: If there is a "H" after your zone, then you are in a designated Historic District.