

PROJECT HANDBOOK FOR THE COMMITTED (if you are not, this may not be for you)

ROAD MAP OF AN ARCHITECTURAL PROJECT.

Points not necessarily in order of implementation. Once discussed client to sign as read.

- **Feasibility studies;** Prior to main agreement – **Priced as separate item**
 - Introduction -Brief
 - Site - vicinity
 - Site analysis including planning restrictions – Planner may need to be consulted
 - Goals
 - Building concept – sketches
 - Cost estimate – prepared by independent professional – QS.

Note: owner to pay fees to independent professionals. A feasibility study may ultimately indicate a project is not feasible or intended scope needs to revise. Fees paid towards studies will ensure projects that are not realistic do not start, thus saving a great deal of money in the long run.

If a feasibility study is **not** conducted, preliminary consultation to establish;

- Brief – client requirements.
- Architectural language – aesthetics
- Architect's questionnaire to be conducted.
- Establish client's expectations v's reality

Preliminary Consultation fee applies.

Architectural Hub will not provide a preliminary fee structure during the first meeting.

- **Generate Architect / Client agreement**
 - Fully clarify
 - Stages to be involved
 - Role of the Principle Agent (PA) – architect or QS
 - Confirm fee structure.
 - Fees are based on the ORIGINAL proposal. If the proposal revises additional fees will apply.
 - Fees are limited to agreed works.
 - Raise concerns and issues. Note in addendum.
 - Limit assumptions
 - Architectural fees are also based on time frames. Should a project extend beyond the agreed finish date, architectural services are not to be deemed never ending.
 - Define payment terms – architect Client
 - Define roles and responsibilities of QS, PA, Fire, mechanical and structural engineers. Appointed professionals to present.
- **Subscribe to full fees – fee generation**
 - Fees based on % of building costs defined by current building rates.
 - Building costs
 - External costs
 - Provisional sums
 - Prime cost items.
 - Hourly rates apply where applicable / agreed upon.
- **Deposit applies. 10%.**

- **Become contractual** – follow the contract, only deviate if all parties agree and are aware of the consequences. Non payment has consequences.
- **Define responsibility.** Client / contractor / architect / subbies.
- **Discuss non-performance** by; Breach of contract.
 - Client – payments/decisions/information etc.
 - Architect – instructions/details/information etc.
 - Contractors – schedule/works/paperwork/comms.
- **Architects are not project managers;** they are quality and contractual controllers.
- **Client to appoint a project manager** or ensure contractor will project manage.
- **Clarify communication channel.** Client, architect then contractor. If client bypasses architect client and contractor takes responsibility.
- **Obligations of architect and Client** – refer to Architect Client agreement.
- **If client wants a defined project cost / evaluation / project feasibility client to ask a QS.**
- Discuss need for site survey by qualified surveyor.
- **If a QS is not appointed** architect issues costs with reservations.
 - Architect is not a cost consultant unless stated otherwise.
 - You get what you pay for.
- **Clarify who deals** with and ensure completion of;
 - Sectional titles
 - Subdivisions
 - New OR upgraded electrical connections
 - PAY AS YOU GO connections
 - New OR upgraded water connections
 - Define who deals with;
 - Paperwork
 - Follow up +
 - implementation
- **Dealing with a client** nominated subcontractor. Client to be aware of responsibly and involvement within contract.
- **In the early stages** of a project prior tender, Client to get comment / proposal / costing from;
 - Landscaper
 - Security company / installer
 - Alarms
 - Intercoms
 - Electrical fencing
 - Etc.
 - Information can then be issued or added to tender documents.
- **Municipal issues:**
 - Part XA requirements
 - Client to be aware of time frames involved.
 - Time constraints.
 - Relationship between municipality and the public.
 - Red tape.
 - Necessity for private planners. **NB.**
 - Necessity for municipal submission runners.
 - Client to attend municipal meetings.
 - Client to understand submission requirements. Planning + departures to building control.
 - Client to be aware of a departure process and what is involved.

- Heritage resources and Heritage Provincial.
- Forms
- Fees
- Municipal revisions
- **How to deal with a DEPARTURE application.**
 - What is a departure
 - Time constraints
 - Departures equal time, time equals fees.
 - Need to QS
 - Need for private planner
- **Clarify decision** making process and issuing of information. Client to architect to contractor to subcontractor.
- **Define exclusions up front** – these can be added at a fee.
 - Advertising proposals – creation of plans, images, areas etc.
 - House number
 - Letter boxes
 - Alarms and reticulation
 - HVAC
 - Internet
 - Appliances
 - Curtain rods
 - Landscaping including water reticulation
 - Door stops
 - Signage
 - Security installation
 - Survey
 - Sectional title
 - Conveyancer
 - Others to be defined.
- **Define client's expectations** – Brief. Make the client aware of his responsibilities and consequences of decisions.
 - Changes, upscale or down have cost implications – fees
 - Lack of prompt payment equals slowed delivery
 - Limited clarity leads to additional costs.
- **Discuss decision list** (client choices) – See list.
- **Clarify what is within** the Architect / Client contract plus JBCC – Client / Contractor.
- **Organise JBCC** or equivalent
 - All relevant communication in writing. Record of events.
 - Clearly define accountability
 - Add addendum where required. See sample.
 - In a costing / tender a contractor may have assigned a sub-contractor. What is going to be obtained / achieved, what finishes are to be gained etc. Client and architect must be informed.
 - A cost / price defines a product that defines quality that defines outcome.
 - Ensure shop drawings are provided and signed off.
- **Client / Contractor needs** to read documents, not to rely on a summary.
 - Will do layouts (fee based - %10 plus)
 - Bathrooms
 - Kitchen
 - Scullery etc.
 - Interiors
 - Electrical and lighting

- Alarm reticulation utilising specialist information.
 - HVAC reticulation utilising specialist information.
 - Window and door schedules
 - Won't do (up to 4.1)
 - Window and door schedules
 - Electrical layouts
- **Tendering options.** More information provided the better. Clarify expectations.
- **Client to advise** on who is to tender. Ensure liability.
 - What is seen as a favour now (lower budget) may prove costly in time due to lack of clarity and not enough funds.
 - Architect may recommend companies to tender, with caution. Accountability to be noted.
 - Client to view other projects by tenderer.
 - Architect may evaluate tender based on current construction costs. This is not ideal. QS to be consulted.
- **Tender / contractor** to 'sell' his company to client not architect.
- **Client with architect** to follow up on tender recommendations / works completed.
- **Pricing options** and length of validity – how long does a tender last before it needs to be revised.
- **Define VAT payments** at beginning of project.
- Always get a **project program** from the Contractor. Do not accept until all stages are defined.
- Contractor to provide **detailed costing breakdown** to be used to evaluate contractors claims.
- **Client to sign off** on awarding of tender.
- **Ensure contractor / client is clear on;**
 - Project timing
 - Project budget
 - Retention
 - Guarantees
 - COC's. (certificates of completion)
 - All certificates to be issued at Practical Completion Stage.
 - Instructions (variations). Decide, price, confirm then proceed. Clarify costs.
 - All changes or variations to be priced separately
 - All variations to be documented, priced then approved by the owner. If this is not done keeping track of finances will be complex and will lead to disagreements.
 - Payments to suppliers – DEPOSITS. Contractor may make additional claims to pay deposits.
 - Claims from Client
 - Health and Safety – size of project dependant.
 - Client to be made aware of responsibility.
 - How to deal with project over runs – beyond completion dates.
 - Rain delays – to be noted by all parties.
 - Provisional sums / what are they– define where labour is priced.
 - Prime cost items / what are they – define where labour is priced.
 - **Clarify** - Based on the project costing, what is the owner getting? E.g. marble or granite. Applies to all PS and PC items.
- **Always note client wishes** with regards to what stays and what goes. (alt + add).
 - If items stay what is to be done – decisions to be noted as these may become cost items later.

- Architect '**may**' **make recommendations** with regards to other professionals and contractors with caution. Client to sign off.
- **Discuss payment of fees.** No fee no work.
- **Ensure client signs** off on all stages of design (layouts)
- **Ensure client signs** off after municipal approval.
- **Provide hand over** agenda.
- **Client revisions** – client to be aware of costs involved – architectural / construction others.
- **Revisions may require** additional fees to be paid to engineers etc for revised drawings.
- **Revisions during construction** will require creation of 'As Built' drawings. Addition fees apply.
- **Revisions may require** additional municipal approval at the end of a project. This will affect the issuing of a Completion Certificate.
- **Client to sign off on revisions.**
- Fees will be charged for on completion of stage or part thereof - monthly. If not done this can lead to ambiguity.
- **When a stage** is completed charge full fee.
- **Shop drawings;**
 - Joinery
 - Fabricated items
 - Advise client on how one installation may affect another;
 - Joinery revisions may affect electrical installation – costs involved.
 - Architect to comment – responsibility defined.
 - Revisions made by fabricators may delay project program – note delays.
- **Contractors claims**
 - Project deposits
 - Working capital
 - Monthly claims
 - Request for payments
 - Control of provisional sums – Client / contractor.
- **Issues that may arise;**
 - Contractor
 - Limited cash flow
 - Non-payment by owner
 - Changes requested by owner
 - Rectification of items done by client nominated subbies
 - Client
 - Non completion by contractor
 - Payment of provisional sums – who's liable.
 - Non performance by contractor / subbies.
 - Delays
 - Payments
 - Architect
 - **Client expectations v's fees – what do I get for my money?**
 - Revisions by client – time loss and costs
 - Fees and delays
 - Project extension and reduced fees
 - Responsibilities with regards to contractors and subbies.
 - Sub-contractor performance. E.g. joinery fitout based on projected costing (provisional sum) v's client's expectations.

- **Additions and Alterations**
 - Be realistic
 - Hidden items – additional costs. Foundations, plumbing electrical etc.
 - Rectification of items not clear at the start – contingency
 - Cracking – assessment required.
 - Inadequate existing structures – rectification required.
 - Non-compliant installations with regards to electrical and plumbing
 - Clear note reuse items. Limit 'I told you so'.
- **SANAP** – Stop, advise, negotiate, agree, proceed.
- **Completion stages.**
 - Stages to be defined such a trenching, foundations, slabs etc.
 - Client with or without architect to inspect, with contractor and sign off.
- **Plumbing**
 - Plumber to mark-up drawings showing reticulation if drawings are not issued.
- **Electrical**
 - Electrician to mark-up drawings showing reticulation if drawings are not issued.
- Location of electrical and water meters to be confirmed with owner from the start.
- **Latent and patent defects**
 - Ensure lists are accurately created.
 - Do not accept verbal assurances from contractor that defects will be attended to. "I'll sort it out" will not be accepted.
 - Once a defect has been rectified it can be ticked off.
- **Guarantees**
 - Contractor to provide all guarantees as required.
- **Final completion.**
 - Finalise final account
 - Project Sign Off at end of latent defects period.

ONGOING. (as you can imagine)