

Preface

As you read this article, keep an open mind about the scale of and application for the process of programming. You can scale this programming exercise to determine what you need from a single piece of furniture to an entire property. Don't be shy about using this exercise to establish specific criteria and settle differences before you set out to make a purchase. You'll save time, take the stress out of the actual buying process and make a better purchase since you've segregated your wants from your needs... this is a big step toward dodging buyer's remorse.

The application of this exercise is quite flexible. Once introduced to the concept of programming, most people think of it as an exercise that precedes architectural services. That doesn't have to be the case. For example, all home buyers should use this exercise to explore and distill their requirements. Even if you don't want to build or add-on, handing a program to your realtor gives him|her a much better idea of you're after. You can speed the process along by evaluating your choices against your program. You can even use this exercise to help you find the right undeveloped property.

Introduction

All projects, large or small should begin with an assessment of the Owner's functional and aesthetic needs. We coach Owners through a two-step exercise that documents these requirements in the Owner's "program". The program is our frame of reference throughout the project. It allows us to determine the scope of the work and become intellectually and emotionally invested in the Owner's vision for the finished project.

Organized Owners

The most important function of the programming exercise is that it forces the Owner to organize his|her thoughts before the beginning of the design phases. This makes it much easier for the Owner to convey his|her

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Programming

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vision to the Architect and can substantially reduce the design fees by giving the project team direction early on in the process.

The program isn't expected to be perfect. The design team works with the Owner to flesh out any missing pieces or issues that were too much for the Owner to consider without the help of a design professional.

The design team can also offer alternate solutions to the design problems encountered as the work progresses. For example, the design team could use the program to develop three responses to the program, allowing the Owner to choose his|her favorite solution.

The Participants

All parties who will have (any) input into the development of the design must complete the programming exercise *separately*. Where the Owner is a husband and wife team, each spouse should develop a program. They should reconcile their programs (as best they can) before presenting them to their Architect.

Reconciling the programs before you get to the Architect serves three main purposes: 1) It forces each party to develop and organize his|her vision so it can be communicated. 2) It saves the fee you'd spend while your Architect waits for you to finish reconciling your programs. This often includes debating what should or should not be included in the program. This can be a substantial waste of fee dollars if the parties haven't done their work up front.

The third purpose is possibly the most important: 3) Reconciling the programs early helps prevent changes once the project is already underway.

It's quite common to make changes as the project develops. It's also

common to amend the program (more about that later). The design phases are an exploration and documentation of the Owner's decisions. However, major disagreements between the programs (or visions) for a project lead to major disagreements over the design solution that develops. If one party does not participate in the programming exercise, then tries to get involved later in the project, even constructive criticism can produce a great deal of emotional strain. In addition to the emotional strain, major changes late in the process can lead to a financial strain as well.

This can be particularly true of husband and wife teams. It's very difficult for the spouse getting involved late in the process to get up to speed because he|she hasn't developed a vision for the project and hasn't followed the reasoning that lead to the current iteration of the design. As you might guess, this creates a substantial burden on all parties.

Keep in mind that the stress and strain described in this article is in addition to your average daily stress and strain, which for most people is almost more than they can handle. When you add the intellectual, emotional and financial investment required to execute a building project, it can be enough to cause some people to retreat... even as the process continues. Our vigilance for these issues should increase as the budget and number of involved parties increases.

Outsourcing Your Stress

In all cases, you should consider outsourcing your stress and strain to your Architect. Let your Architect provide objective comments that may help resolve differences. If you can't make any progress, get your Architect fully involved in the programming process so that he|she

develops the program with you. This may be accomplished in an interview format or through other methods more in tune with each party.

Owners who are not comfortable developing, or do not have time to develop the program, should proceed with an initial meeting with their Architect rather than waiting. Owners are also welcome to bring questions and unresolved issues as a part of the program. Be sure to consult with your Architect *before* you let the development of your program get you frustrated or feeling overwhelmed.

Timing

Though the program can be thought of as a living document, it is often referenced in the Agreement (for Services) between the Owner and the Architect. This assumes the program is finished before the Agreement is reached even though most Owners like to have an Architect available to answer questions and provide guidance as they develop the program. How can you have both?

If you choose to sign an Agreement with your Architect before you've developed the program, you should record your understanding that the process will start with a programming phase rather than jumping into the design phases. You should never sign an Agreement that does not give you the right to terminate the entire Agreement at your (the Owner's) convenience, and without cause.

So, even though an Agreement sounds like a big deal, it should not lock you into a process or project. If your programming exercise reveals some unexpected conditions, you should be able to cancel or suspend work on the project.

This method is the preferred method for Owners because you've already negotiated an Agreement with your Architect: you don't risk going through the programming phase only to realize you can't come to an Agreement with your Architect and you shouldn't be surprised by any

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changes in the fee structure for the phases that follow the programming phase: design, bid, build, etc.

If a full Agreement for Services between you and your Architect is more than you need, ask your Architect for an alternative. There's relatively little liability in the programming phase so your Architect may already have a simple fee Agreement that you can use. This is particularly helpful if you're developing a program that won't be followed by design services (as discussed in the Preface of this article).

Coordinating Workflow

As you start developing your program, let your Architect know what you're doing. He/she should be able to offer comments that will save time, provide additional resources and help you better organize your thoughts. Ask whatever questions you like before and during the development of the program. (Most Owners want to know how much information is enough?)

This on-going discussion with your Architect will help you both consider the project schedule. Your Architect may not be accepting any new work because he/she has a full workload. You may need to schedule a start date that gives your Architect some time to get some work out of the office and get ready for your project.

Living Document

This article describes the program as frame of reference through which you will evaluate your decisions in the design, bidding and building phases. At some point, you may need to adjust your frame of reference. This is often a result of the exploration that occurs in the design phases.

As the program is translated into an actual form, you may realize that you have too much program for the project site, too much program for the budget or you may find any other number of issues that are only revealed through a more in-depth exploration of the issues.

The original (reconciled) version of your program is the benchmark against which you must compare all the compromises that you make to account for each issue revealed in

the design phases. Only the Owner can determine whether the project has strayed too far from the original vision.

Two-step Process

The following pages are intended to serve as an inspiration, if not a template, for your program. You should have one copy of the General Project Information page and as many copies of the Room Data Sheet page as you need to describe each space.

The two-step process is simple enough: 1) Record the finite requirements such as function, building system requirements and adjacencies. Each space gets its own piece of paper which you can amend as you collect information. You may add additional pages to record information about elements like the building site or even a space within a space.

The second step will likely require a bit more work and a trip to your local bookshop: 2) Collect images, product data sheets and any other information you can assemble to describe the elements within or characteristics of each space. You should consider making notes on the images and fastening them to their corresponding room data sheet. It's also helpful to collect images of things that you don't like, particularly if they're being advertised as the latest trend.

Some people use a notebook with a divider for each space. They use plastic sleeves to contain the images. Some people put everything in a word processing computer application. Some people make notes and keep everything loose in a folder.

You'll have to find *your* best method for keeping up with the program. (Your method may be completely different from your spouse or other parties.) The goal is to get your thoughts organized enough to be presented and documented.

Don't forget to spend some time looking through books about your preferred architectural style(s). You can also often find ideas on the web sites of the product vendors. Some vendors even suggest clever ways to use their products.

Notes

General Project Information

1. This project is a renovation addition new construction.
(You can check 'renovation' and 'addition' if both are applicable.)
2. Name of the property owner(s):
3. Physical address of the property:
Street:
City, State, Zip Code:
County:
Country:
4. Available municipal utilities:
 Electricity Water Sewer
 Natural Gas Telephone Cable|Broadband
 Trash Pick-up Recycling Pick-up
5. Does the Owner have a survey? Yes No
(Please **do not** commission a survey without speaking with your Architect.)
6. Does the Owner have a CADD version of the survey? Yes No
7. Does the property fall under the jurisdiction of a neighborhood association?
 Yes No
8. Does the neighborhood or municipality have any development or design guidelines, including covenants? Yes No
9. Is the neighborhood part of a historic conservation or preservation district?
 Yes No
10. Is there a stream and/or storm water structure on the site?
 Yes No
11. Do you need an ADA accessible floor plan? (Ask your Architect about accessibility options like a no-step entrance, in-law suite and wider doors|passage ways.) Yes No
12. What is the Owner's preferred architectural style(s) for the exterior?
13. What is the Owner's preferred style or feel for the interior?
14. Does the Owner require any of the following:
 Security System Safe for Valuables
 Hidden Room Safe Room
15. Does the Owner require emergency|back-up power? Yes No
16. Does the Owner have any requirements for sustainable design features? If so, please record them. (Ask your Architect about the available options.)
17. What are the Owner's preferred floor-to-ceiling heights (in feet)?
 Basement Main Floor Second Floor
18. The following are common packages for residential work. (Ask your Architect if you'd like specific definitions of each.) Images depicting the Owner's preference for each would be very helpful:

Use the back of this page or attach additional pages as necessary.

[Please review pages one and two of this article for comments about developing the program before you begin the exercise.]

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Window Package

Casework Package

Lighting Package

Door & Door Hardware Package

Trim Package

Plumbing Package

(Fixtures only for the lighting and plumbing packages.)

Notes

Residential Room Data Sheet

1. Room function|name:
2. Number of occupants:
3. Required adjacencies:
4. Required furniture, equipment & contents:

5. Natural Light? Yes No Natural Ventilation? Yes No
6. Lighting Requirements:
 Ceiling Dimming Task Lighting
7. Communication Requirements:
 Telephone Data Cable |Broadband
8. Acoustic separation from other spaces required? Yes No
9. Plumbing Requirements:
 Cold Water Hot Water Sink
 Bath tub Shower Toilet
10. Mechanical Requirements:
 Exhaust Ceiling Fan Air Conditioning
11. Security:
 Locking Door Hardware Alarm Panel
12. Floor Finish:
 Carpet Vinyl Hardwood
 Tile Other
13. Wall Finish:
 Paint Tile Other
14. Ceiling Finish:
 Paint Acoustic Tiles Other
15. Interior Trim:
 Base Chair Rail Wainscot
 Crown Moulding Other
16. Views?

References to images, product data sheets, etc.

- 1.
- 2.
- 3.
- 4.
- 5.

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(It's not necessary to find five images, product data sheets, etc. If you have more than five, continue the numbering on the back of this sheet.)