

Project Planning Guide

We are offering this free guide to set you on the path to a successful and stress-free building project.

Understanding your needs, establishing priorities, and setting clear project goals as early as possible will save you time, money, and lead to optimal results.

Included are several worksheets that will help you bring your ideas into focus, establish a preliminary budget, understand the process at a high level from concept to completion, and determine if you are ready to take the first step toward realizing your vision!

Following this guide will help you reduce risk and make the most of your investment.



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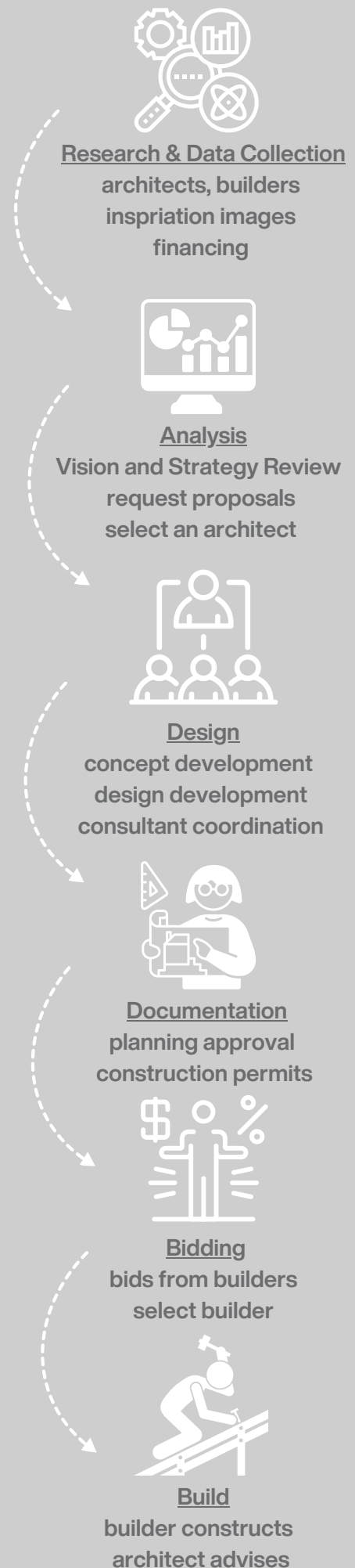
01. Building Project Roadmap

You Are Here: The Research Phase

Most projects follow the steps shown in the flow diagram on the right, with variations based on project size, complexity and delivery method, but **ALL** projects begin with the **Research & Data Collection Phase**: gathering site information, exploring ideas, looking into financing, researching builders and architects, collecting inspiration images, etc.

At the point you want to get serious, you will want to check the feasibility of your ideas and understand what the project constraints are.

If you work with us, we will move to an analysis phase by conducting a **Vision and Strategy Review** to eliminate assumptions, identify constraints, and determine your best options. This process minimizes project risks and provides optimal solutions for your site and budget.



02. Building Cost Estimator

The #1 Question

The most common question architects, builders and every other professional hears is 'how much will my project cost'? There are so many variables that a definitive answer is impossible without having a fully developed set of plans. Even worse, the consequences of trying to answer and risk giving 'bad advice' will have most experts running away to avoid the question.

The problem is that this question is VERY important.

No one can proceed if they don't at least have a ball-park estimation of cost. This guide will help you to determine an estimate of overall project costs. Your actual number may be higher or lower depending on many factors, but the table below will be helpful to see an estimated figure in order to start budgeting and fine-tuning your project goals.



Construction costs vary widely by region. The matrix below is a sampling of construction costs for common project types in the San Francisco Bay Area based on various data sources and our own project experience as of Q2 2024. Values are expressed as average "hard" costs per square foot. Hard costs are those directly related to construction including materials and labor. Soft costs are additional costs not directly related to the construction including land, professional services, permit fees, etc. There are many factors that will affect construction costs including site geology and topography, access to utilities, existing and unforeseen conditions in the case of additions, renovations and tenant improvements, construction access, level of finishes selected, material and product lead times, etc. Ultimately, actual project costs are based on a complex calculus that we can help you navigate based on our many years of experience with a wide range of project types.

We recommend budgeting 10-20% of the construction cost for professional fees (architecture, engineering, etc.). Actual costs will be determined by the project scope, complexity, and finish level. We can provide a more accurate fee quote upon completion of a **Vision and Strategy Review** to get a more complete understanding of your project objectives and parameters.

Hard Construction Cost Estimator By Project Type in USD / Square Foot				Estimate Your Cost	
Finish Level	Standard	Medium	Luxury	Area in SF	Cost
Residential New Construction	\$450	\$700	\$1,000+		
Residential Interior Remodel	\$200	\$450	\$700+		
Accessory Dwelling Unit	\$350	\$600	\$900+		
Multi-Family/Mixed-Use	\$300	\$600	\$1200+		
Office Tenant Improvements	\$150	\$300	\$600+		

03. FAQ's & SAQ's

Frequently Asked & Should Ask Questions

Although extensive schooling and training are required for all architects, that doesn't mean all architects are created equal.

Finding the RIGHT architect for you depends on several factors, including: personality, design style, budget and whether your project requires a specialist skill set.

Choosing the right architect can mean the difference between an enjoyable experience and one plagued with problems throughout the design and construction process.

How will your project go? Use the questions below to get the right answers ...

- *What unique value do you have for our specific type of project?*
- *How can you add value to our home so that we maximize the return on investment when/if we sell?*
- *Do you offer a pre-design analysis service to help move us safely and efficiently towards the design phase?*
- *What are the specific challenges for our type of project and how have you overcome these in the past?*
- *If my budget, timeline, and scope of project are unrealistic, will you let me know?*
- *How would you like me to share my ideas, images, needs, wants and research?*
- *What can I do to help you deliver the best work for us?*
- *Do you have a team game plan that outlines how we will all successfully work together, even under pressure?*
- *Will you run the construction bid process to find and select the best construction team?*
- *What educational material do you provide so we can understand the requirements of our specific type of project?*



04. How To Create A Design Brief Using Only 7 Questions

What are your project needs and goals?

Answering the following 7 questions will give you a head start. We can help you develop this into a full design brief through a **Vision and Strategy Review**.

- 1 What is your current situation & budget?

- 2 What changes will improve your situation?

- 3 What will you need to see to know your project has been a dramatic success?

- 4 How do you want to FEEL as you move through your new space/building?

- 5 Who are the important people this space/building needs to be designed for?

- 6 What are the budget, timeframes and boundaries we need to work within?

- 7 What does your space/building really mean to you?



05. Readiness Slider

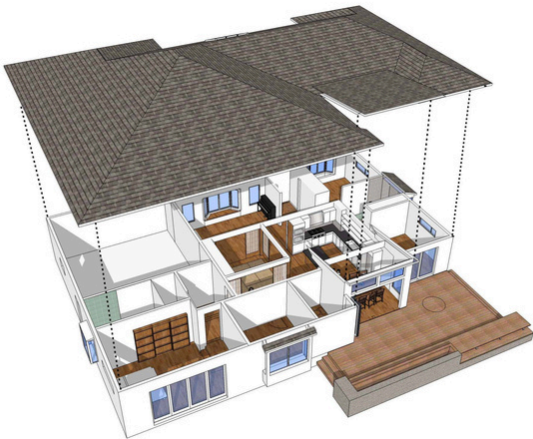
Do You Need An Architect?

This exercise allows you to assess how ready you are to move to the Design Phase. If you are not close to 10 on ALL scales, then it's best to seek help from an expert to do this research.

Remember, thorough preparation now can save you significant time, money, and headaches later on in the project. If you rush into the design phase without this information available, you'll run the risk of making too many assumptions, which is the #1 reason projects go over budget and over time.

This critical evaluation ensures that you're equipped with the necessary insights to make informed decisions and avoid common pitfalls as you progress through the project lifecycle.

Don't fret if you haven't reached a perfect 10 on all scales just yet. Our **Vision and Strategy Review** process is designed to assist you in bridging any knowledge gaps and preparing you for the Design Phase.



ON A SCALE OF 0 TO 10...

- 1** How clear are you on exactly what you need? 0 ●—————● 10
- 2** How aware are you of all the various options your site will accommodate? 0 ●—————● 10
- 3** How confident are you that you are aware of all the legal requirements? 0 ●—————● 10
- 4** How aware are you of the process you will need to have in place to get the project completed on time and on budget? 0 ●—————● 10
- 5** How confident are you that you that your budget will achieve your needs? 0 ●—————● 10
- 6** Give yourself a current overall rating for readiness. 0 ●—————● 10

06. Vision And Strategy Review

Undertaking a building project is a big investment, and before you start you will want to reduce the risk of incurring unnecessary design fees, higher construction costs than budgeted, and project delays. You need the right architect who has the specific skills for your specific needs and who is the right 'fit.'

*In our experience the best way of finding out whether we are the right 'fit' is to fully understand what you are looking for. This is achieved through an initial consultation and our **Vision and Strategy Review**.*

Our findings from this preliminary consultation will reduce your risk and give you peace of mind as you move forward.

The Problem

It is not uncommon for property owners to know they want to do a building project, and have thought about it quite a bit - but just not know the best way to proceed.

It is for this reason that we have developed the **Vision and Strategy Review**, a necessary first step to establishing the basis of your project that will allow you to precisely understand your requirements and potential roadblocks, then provides:

- Findings and recommendations
- A concrete plan to move forward
- A timeline and rough order of cost

Our experience shows that proper planning from the beginning saves money, eliminates stress surrounding confusing terms and options, guides you in receiving accurate bids from builders, and streamlines the process by focusing on design strategies that maximize your return on investment. Our Vision and Strategy Review guides you toward the best approach for your project to meet your functional needs and aesthetic goals within your financial means.

The Promise

The **Vision and Strategy Review** will allow you to fully understand the requirements, constraints, and potential roadblocks for your project. It will:

- Minimize your risk of faulty design decisions by laying the proper groundwork up front
- Allow you to create the proper foundation for a project, saving money in the long run
- Allow you to explore your goals for the project in a structured format
- Help us determine if this working relationship is a fit for both parties before fully committing to further design services



The Process

The **Vision and Strategy Review** is a structured process tailored to each unique project and generally includes the following:

- We will meet with you on-site to discuss your preliminary objectives for the project.
- We will develop an outline brief describing functions, uses, and spaces required.
- We will review site options and identify regulatory issues.
- We will review the planning viability of the project and your ideas.
- We will identify potential solutions in outline form.
- We will prepare a conceptual budget for the project.
- We will prepare a preliminary schedule for the project.

Outcome: a **Vision and Strategy Review** report that you can use to get an accurate proposal from us or from any other architect - it is yours to keep!

The Investment

The fee for the **Vision and Strategy Review** will depend on the scope and complexity of your project: whether a residential remodel, new home, commercial tenant improvement, or mixed-use/multi-family building.

If you wish to proceed, simply scan the QR code or click the link below to book a free 30-minute Discovery Call during which we will evaluate your project needs and provide you with a fee quote after we have gained an understanding of the scope of your project and determined that we are a good fit to work together.

You can also simply email us at info@ocarch.net, or call us directly at 415-398-3002.



Ready to take the first step?

Scan the QR code or click [HERE](#) to book a complimentary Discovery Call to explore how we can transform your vision into reality.



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