



**Francis C. Klein and Associates, Architects**  
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## **PROJECT PLANNING PACK**

### **Rapid Project Planning for the Research Phase**

*“If I had six hours to chop down a tree, I’d spend the first four sharpening the axe.”*  
–Abraham Lincoln



#### **1. Overview: The #1 Project Problem**

The #1 problem is projects going over time and over budget.

On a daily basis, we see people moving projects into the design phase before the research has been completed. This is like a doctor starting surgery without a diagnosis, or like trying to build a house on an unstable foundation.

This is why we created our **Project Planning Pack**. Now you have a clear and easy process to move you through the *research phase*.

If you follow this guide, you will reduce the risk of your project going over time and over budget, and you will improve your project’s design.



#### **1. Overview (this page)**

Once you have ticked these eight boxes, you are ready to move to the *analysis phase*.

#### **2. Renovation Project Roadmap**

Review the roadmap and identify where you are on your renovation journey.

#### **3. Directory of Experts**

A directory of experts who can help you at each stage of your design and construction process.

#### **4. Project Cost Estimator**

A simple do-it-yourself worksheet to estimate the cost of your building project.

#### **5. FAQs and SAQs.**

Frequently-asked questions and should-ask questions about working with an architect.

#### **6. Myth vs. Reality**

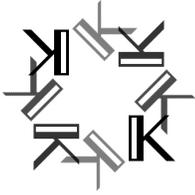
Some hidden things that architects do to guide your project to completion.

#### **7. How to Create a Design Brief**

Seven questions that will help you create a design brief to share with your shortlisted architects.

#### **8. Readiness Slider**

Gauge how ready you are to move to the *design phase* of your project.



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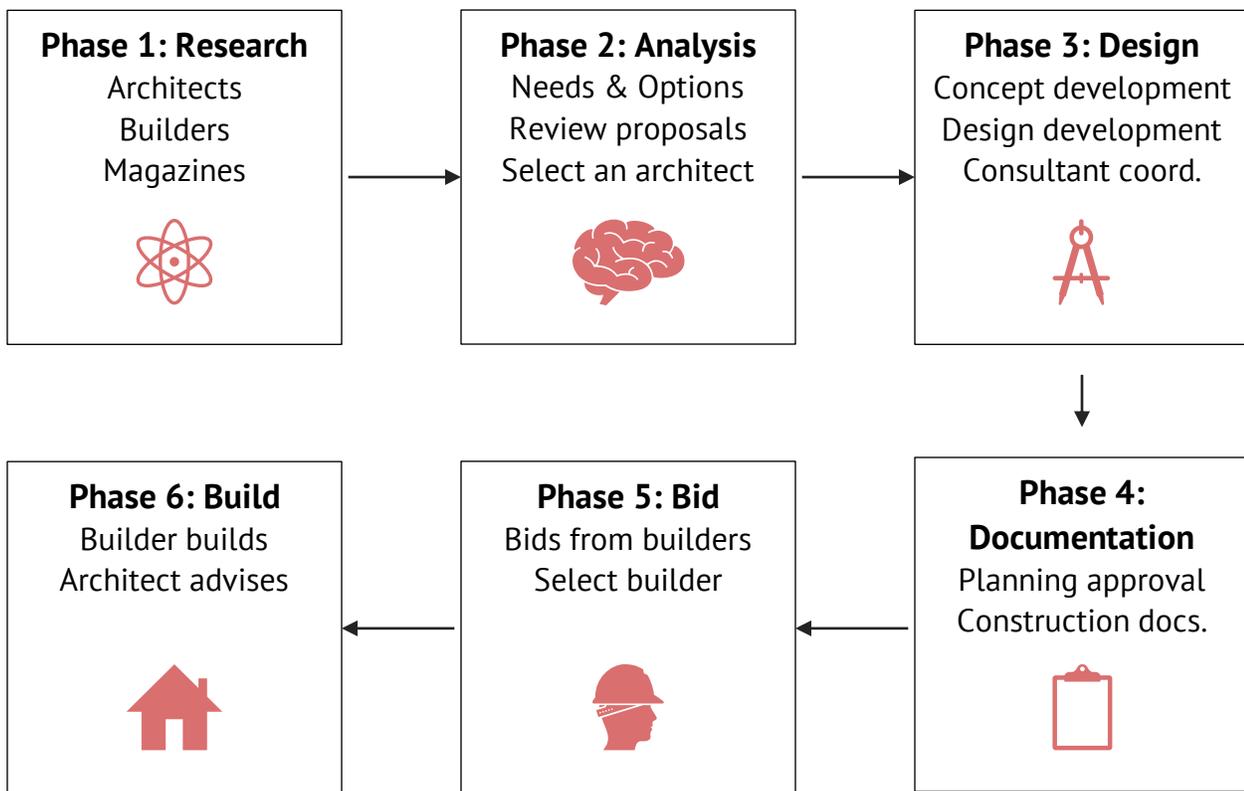
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**2. Renovation Project Roadmap: The Major Steps Required for your Renovation Project**

This is important. Please read carefully!

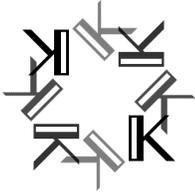
Right now, you should be in the *research phase*. This is the phase for gathering information and playing around with ideas. When you decide to take the next step, you will want to check the feasibility of your ideas and understand any project constraints.

If you work with me, we will move to the *analysis phase* with a [Needs and Options Review](#). This review will eliminate any assumptions, identify any constraints, and find your best options. You will receive a document that can be used by me or any other architect that will ensure that you reduce your project risk and get the best options for your home (or office), your budget, and your schedule.



**When you are ready to review the feasibility of your project, email or call us →**

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**3. Directory of Experts: Our Personal Directory of *Trusted* Experts**

Who are these experts?

Understanding *what* to do is one obstacle and working out *who* can help you is another.

On a daily basis, our team receives requests for us to recommend design professionals. To make this process easier, I have listed the design professionals we trust for specific types of projects. Not only do they do a great job, but they provide excellent advice a well. These are the experts we trust explicitly.

If you have other questions about your project, don't hesitate to reach out to me. If I can't answer your question, then I'll direct you to someone who can.

Profession	Name	Company	Contact Details
Architect	Francis Klein	Francis C. Klein & Associates	(973) 783-0688 <a href="mailto:info@francisccklein.com">info@francisccklein.com</a>
Builder	Gary Stoddart	Stoddart General Contracting	(973) 865-5854 <a href="mailto:gstodd1@gmail.com">gstodd1@gmail.com</a>
Structural Engineer	Paul Beck	PBA Engineering	(973) 276-1700 <a href="mailto:paulb@pbanj.com">paulb@pbanj.com</a>
Interior Designer	Debra Post	Debra Post	(917) 509-1310 <a href="mailto:debrapost1@gmail.com">debrapost1@gmail.com</a>
Home Inspector	Robert Schwalbenberg		(973) 744-6674 <a href="mailto:rschwabenberg@verizon.net">rschwabenberg@verizon.net</a>
Landscape Architect	Hans Hesselein	Apiary Studio	(609) 954-3988 <a href="mailto:hesselein@apiary.studio.com">hesselein@apiary.studio.com</a>
Surveyor	Richard Hingos	Hingos, Inc	(973) 783-1114 <a href="mailto:rjhingos@comcast.net">rjhingos@comcast.net</a>
Mechanical Engineer	Stanislav Slutsky	SSPE Group	(212) 732-9300 <a href="mailto:stan@sspegroup.com">stan@sspegroup.com</a>
Historic Preservation	Mary Delaney Krugman	Historic Preservation Associates, Inc.	(973) 746-2810 <a href="mailto:mkrugman@mdka.com">mkrugman@mdka.com</a>
Electrical Systems Specialist	Ed Lamson		(201) 341-4795 <a href="mailto:delamson@bellatlantic.net">delamson@bellatlantic.net</a>

***The right architect will manage both the experts and the process.***

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#### **4. Project Cost Estimator: The Simple, Do-It-Yourself Way to Estimate Your Number**

The most dreaded question for architects, builders, and every other design professional has got to be, “How much will my project cost?”

There are so many variables that a definitive answer is impossible.

Even worse, the consequences of trying to answer and risking 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 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 more or less, but it can be helpful to see an estimated figure.

<b>New Home Cost Estimator</b>				<b>Estimate Your Cost</b>	
Style	Standard	Medium	Luxury	Area	Cost
Cost Per Sq. Ft.	\$200	\$250	\$300		
1,000	\$200,000	\$250,000	\$300,000		
2,000	\$400,000	\$500,000	\$600,000		
3,000	\$600,000	\$750,000	\$900,000		

<b>Renovation Cost Estimator</b>				<b>Estimate Your Cost</b>	
Style	Standard	Medium	Luxury	Area	Cost
Cost Per Sq. Ft.	\$300	\$350	\$400		
1,000	\$300,000	\$450,000	\$400,000		
1,500	\$400,000	\$525,000	\$600,000		
2,000	\$600,000	\$700,000	\$800,000		

***For a detailed project cost estimate, email me at [francis@francisklein.com](mailto:francis@francisklein.com)***

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## 5. FAQs and SAQs

When hiring an architect, it's helpful to have a process to make sure you get the best person for the project.

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

Finding the right architect for you depends on several factors, including: local knowledge, specialized experience, design aesthetic, personality match, motivation (are they building for taste or to make money?), and even whether your project requires an architect at all.

Choosing the right architect can mean the difference between an enjoyable experience and one plagued by problems the whole way through—especially as the project moves into the *build phase*.

How will your project go? The questions are the answer...

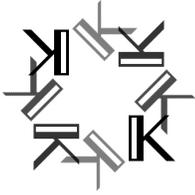
**A great architect is your designer, advocate, teacher, project leader, and coordinator.**

**Here are the questions you should ask:**

- What unique value do you have for our specific type of project?
- How can you add value to our home so that we can maximize the return on investment if/when 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 them in the past?
- If my budget, timeline, and/or scope 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 bid process to find and select the best construction team?
- What educational material do you provide so that we can understand the requirements of our specific type of project?

***Hiring the RIGHT architect is the single most important decision to make for your project***

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**6. Myth vs. Reality: What Do Architects Really Do?**

An architect' role is much larger than most people realize. When an architect manages your project, they ensure that every part of the process below (and more!) is handled to ensure that the biggest investment of your life is safe and secure.

**Myth**

**The architect...**

**Sketches the design** that the builder uses.

**Reality**

**The architect...**

**Checks the title** and, in particular, any easements and/or land convents that may restrict what or where you can build.

**Coordinates compliance** with building and safety regulations, local planning regulations, and restrictions. Depending on the project, there may be laws about the preservation of the local environment or any historic parts of the building.

**Leads the team** of professionals who will work on the project, including builders, tradespeople, engineers, designers, and financial professionals.

Provides **construction documentation** for the contractors and other construction experts who will work on the project, translating the design into instructions and technical specifications, and ensuring that those specifications are met.

Provides **project management**, including site visits and meetings to oversee the construction, validate the quality of the work, negotiate with contractors, and deal with and resolve any problems that might arise.

*In summary, the architect is the conductor of the project orchestra.*

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## 7. How to Create a Design Brief in Seven Simple Questions

**Alice:** “Would you tell me, please, which way I ought to go from here?”

**The Cheshire Cat:** “That depends a good deal on where you want to go.”

**Alice:** “I don’t much care where.”

**The Cheshire Cat:** “Then it doesn't much matter which way you go.”

Don’t be Alice. Know where you want to go.

A *design brief* is a short document for a design project, ranging in length from a paragraph to a page. It describes a project and a general approach, including project scope and goals, as well as timeframe and budget. By describing the project in this way, the design brief helps focus the project and highlights the issues that are most important to its successful completion.

The method below is our famous “Seven Question Design Brief” creator.

Question	Answer
1. How would you describe your current living situation?	
2. How do you live? Is that changing or about to change?	
3. What will you need to see in order to know that your project has been a success?	
4. How do you want to feel as you move through your new space?	
5. Who are the most important people that this home needs to be designed for?	
6. What are the budget, timeframe, and boundaries that we need to work within?	
7. What does your home really mean to you?	

***We can help you work through these questions in person or online.***

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**8. Readiness Slider: Are You Ready to Move to the Design Phase?**

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. If you rush into the design phase without the available information, you’ll run the risk of making too many assumptions, which is the #1 reason that projects go over budget and over time.

“Measure twice, cut once.” – Builder’s Mantra

**Question**

**Slider**  
(0-10, zero = low; 10 = high)

On a 1-10 scale, how clear are you on exactly what you need? | 0 \_\_\_\_\_ 10 |

On a 1-10 scale, how aware are you of all the options your site will accommodate? | 0 \_\_\_\_\_ 10 |

On a 1-10 scale, how confident are you that you are aware of all the legal requirements? | 0 \_\_\_\_\_ 10 |

On a 1-10 scale, how aware are you of the process you will need to have in place to get your project completed on time and on budget? | 0 \_\_\_\_\_ 10 |

On a 1-10 scale, how confident are you that your budget will achieve your needs? | 0 \_\_\_\_\_ 10 |

**Give yourself a current overall rating for readiness.** | 0 \_\_\_\_\_ 10 |

Don’t worry if you are not at 10 on all scales yet. Our [Needs and Options Review](#) process allows you to fill in the knowledge gaps and get you ready to move to the *design phase*.

***Our Needs and Options Review is the process designed to get you to 10 on all these sliders.***

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