

GETTING THERE

A Guide to the Process of Designing & Building the Home You Want

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PREFACE

This booklet provides an overview of the design and construction process for a single family residential renovation project. The step by step process used by myself is explained using text as well as drawings, photos, and other visual aids. Also, the process described is similar for any size project, be it a kitchen remodel or total house makeover.

One of the main thrusts of this booklet is to help homeowners in general and my potential clients in particular understand this architect's methodology. Though every architect uses a similar process due to common training, each architect tailors the process to suit themselves and their marketplace.

Architects, like all professionals, use a language that often is unfamiliar to those outside their profession. Terms such as "programming" and "schematics" are commonly used by architects and have a very specific meaning. We architects often forget that our clients are unfamiliar with these words in an architectural context. This booklet, therefore, provides visual examples for these terms. I hope that, after looking through this booklet, you have a better understanding of the architect's language.

Architects, like all of us, have likes and dislikes as well as strengths and weaknesses. The process described in this booklet is both generic (used by all architects on all projects to some degree) and specific (it really is how this architect works). I encourage all potential clients to use this booklet as an aid to understanding how their architect works.

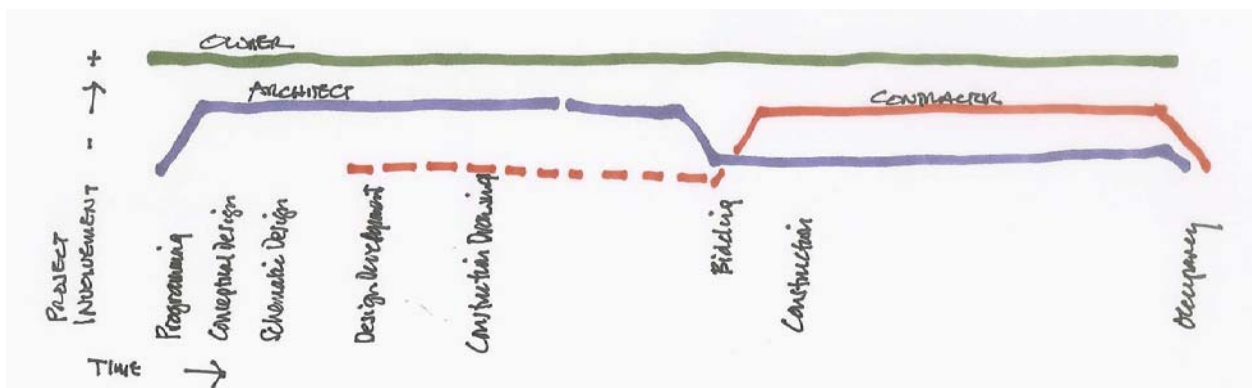
1. THE PROJECT TEAM—WHO'S ON FIRST

The three main players on any project are the owner, architect and builder / contractor. The involvement in and responsibilities for the project activities will fluctuate for each of these players during the course of the project. Also, even though the contractual relationships in the design / build process melds the architect and builder into one entity, the respective roles and responsibilities of these players stay the same as in the traditional design / bid / build process.

Owner: The most important team member because without the owner there is no project. The owner stays involved during the course of the project and is responsible for providing direction, approval and funding.

Architect: The architect is the team member responsible for translating the owner's program (wish list) into a design that can be built and used how the owner wishes. The architect uses drawings as a means to communicate the design to others. As the owner and architect work together to develop the design, the architect records design decisions on drawings that will ultimately be used to construct the project.

Builder / Contractor: This is the team member who will use the drawings and build the project. In some ways, the builder acts as the chef, using the recipes developed by the architect to prepare the meal. Like all good chefs, a good builder will infuse the project with a distinctive personality. This is done not by altering the design, but by constructing the project with care and craftsmanship.



From beginning to end, the main players' involvement in the project will vary with the one constant being the owner. The chart above graphically displays that the architect's involvement in the project is intense during the design phase and then tapering off during construction. The opposite is true for the contractor (or builder), who's involvement is minimal during design and maximum during construction. This will hold true even in a design build scenario as, typically, the architect's skill set is different from the contractor's skill set. So the design build entity will have at least two people managing your project.



2. PROGRAMMING – ESTABLISHING NEEDS & WANTS

An architectural program is a listing of your needs and wants as well as their dreams and desires. Sometimes called a “wish list”, the program should define functional requirements (“we need more space”) as specifically as possible (“we need two additional bedrooms so each of our children can have their own room”).

The program should define what it is we want as much as what we need. For example, we may want a cozy nook to read a book or a gourmet kitchen to dazzle our friends with our culinary skill. These expressions of wants go beyond the merely functional and enable me to understand what it is that is important to you. As such, these are essential in designing the project to fit your living pattern. These programs (wish lists) can take many forms. Scribbling on a napkin, computer printed, marked up photographs, etc.

I'll also ask you to complete the following simple survey.

Please take some time and provide the information collected below. The more specific you are the better I'll be able to design for you. Use words, drawings, sounds, etc. as you need. Magazine clippings are especially useful.

1. Using one word adjectives, describe your house.
2. Using single words, describe your ideal house. Include location.
3. Tell me about your typical workday routine. The more the detail the better. Provide separate routines for each family member.
4. Tell me about your typical weekend / holiday routine. The more the detail the better. Provide separate routines for each family member.
5. Tell me what you don't like about your house.
6. Tell me what you do like about your house.
7. Tell me how you move through your house. Describe what you experience.
8. Who do you entertain? How do you entertain?
9. Tell me about your hobbies and interests.

Also, a realistic project budget should be included as part of the program. The budget should include for all identifiable costs such as general construction, cabinetry, appliances, finishes, landscaping, furniture, and fees.

Programs, like designs, are never fully fixed but can change to reflect new criteria and information. Just as with the design, I keep a record of the programmatic changes, providing you with an understanding of why the design evolves the way it does.

wish list 6/23/01

- garage w/ 2 separate doors.
- new, wood entryway/maybe a porch
- sits around bar.
- winding staircase.
- opening up kitchen & family room / like polster.
- french doors into living room
- cozy nook to read a book
- storage issues
- traditional & capitol / colonial / double hung windows.
- study nook upstairs
- new wood flooring / tile @ kitchen
- mudroom (only from car)
- hang out windows - maybe.
- recessed lighting / surround sound.

master bath

- double vanity
- make up counter
- steam shower / big w/ seat



A Full Retreat

URBAN CHIC MEETS SOUTHERN CHARM
IN A MASTER SUITE BUILT FOR COMFORT.

Tenagers need privacy and space—two qualities that Carolyn Marcel's suburban Chicago home lacked. But rather than create a kid's retreat that would be dormant once daughter Andi graduated from high school, Carolyn decided to build a refuge that she and her husband, Gary, could escape to when life overtook them and could continue to enjoy long after their daughter left home.

Working with Brad Dietrich of HFD Architects and McEugene Smith Builders, the homeowners tore down the master bedroom addition they had built 14 years earlier and created an expanded suite in its place. Carolyn, an Alabama hotel owner, wanted the 1,000-square-foot addition to combine the edge refinement of a Manhattan loft with the genteel charm of a Southern country home. Dietrich completed, pairing high ceilings and exposed brick walls with tall, transom-topped windows. Common railings evoke a sense of history, while an illuminated cove set 2 feet below the ceiling lends human scale to the space.

Carolyn and Gary requested separate closets, but Dietrich thought a wall punctuated by two doors would look more communal, so he concealed the closets behind a row of mirrored doors, only two of which actually open. A see-

through fireplace anchors a sitting area at the foot of the bed and also opens to the bathroom beyond, so Gary can read by the fire while Carolyn gazes at it from her tub.

"The spacious bathroom appears more quaint than clinical. 'I wanted it to look like we took an existing room and remodeled it to be a bathroom,'" says Carolyn, who flouted the classic tub at a rakish angle and scattered colorful rugs atop the dark oak floor. Vintage look more like tables than built-ins, with shined underlaid in lieu of cabinets. Mirrored wall panels conceal shelves packed with toiletries and towels.

Because the house lacked an adequate powder room, Carolyn suggested incorporating a new one into the master suite. The resulting compartment can be closed off from the rest of the master bath when the couple has company, or opened up to the bath to give Carolyn and Gary two toilets.

"The owners are so content in their private retreat that they have been known to forget there is a house," Carol says to come and check on us," Carolyn says with a laugh. "I think she just wants to make sure we're not coming out anytime soon."

RESOURCES ON PAGE 122

The wide hallway leading to the bedroom doubles as a gallery. Side draperies frame windows and French doors. Carolyn Marcel found the nightstand on a Chicago outdoor and covered the piece with linens.

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ADDING WARMTH THROUGH MATERIALS

Natural finishes, toothy textures, and varied patterns give the bedroom vintage charm and the feeling of a space that has been assembled over a long period of time.

1. Cove lighting wrapping the room sheds soft illumination after dark.
2. Reclaimed brick in an array of colors adorns the wall behind the bed, rooting the room in the past and providing a rustic counterpoint to gleaming mirrored doors and smooth shiny fabrics. This brick also is used in the bathroom.
3. Silk draperies add texture to the windows.
4. To give the room a relaxed, "accumulated" look, homeowner Carolyn Marcel blended furnishings in different styles and finishes, and introduced pattern with area rugs and a quilt.
5. Hardwood floors lend warmth underfoot.

LEFT: Tall windows topped with transoms frame a wall of Chicago common brick. An illuminated cove divides the space, sending soft light to the room's 10-foot height.

BELOW: The bedroom shares a two-story fireplace with the bathroom beyond. The look is serene, as is a wall of mirrored doors, two of which open to reveal walk-in closets.



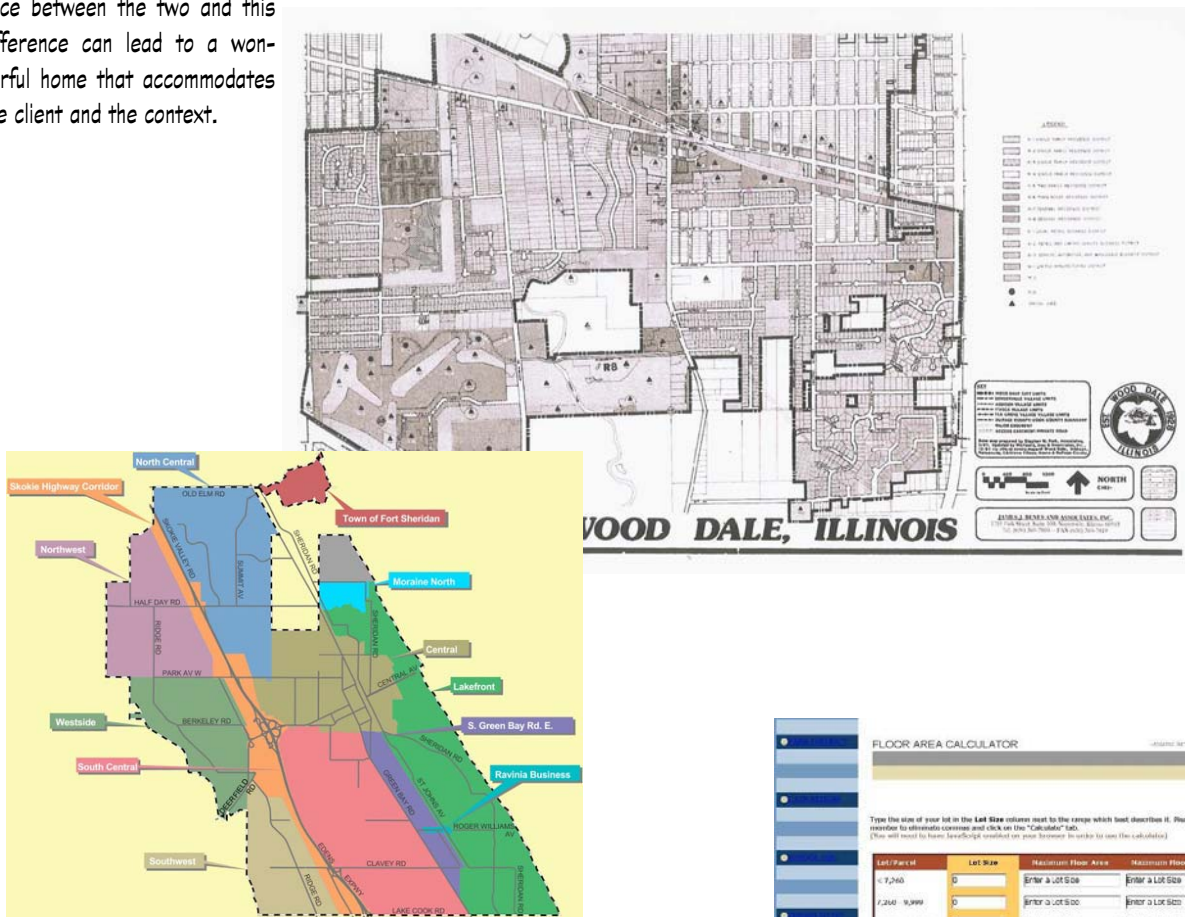
Magazine Clippings

Cut out and save clippings from magazines. These clippings provide an invaluable source of imagery, helping me understand what it is you're after.

3. BUILDING CODES & GOVERNMENTAL CONTROLS

Prior to starting anything but rudimentary design work, I'll conduct a survey of the existing conditions and investigate applicable zoning regulations. A survey of the existing conditions allows me to become familiar with the project site and any existing conditions requiring special attention (cracked and settling foundation, outdated mechanicals, etc.).

And I always take this step as an opportunity to let the existing structure tell me what it wants to be. As I move around and learn about the existing structure and its site, I'll determine if the house wants to be big or small, grand or modest, new or old, etc. I'll talk to the owner about this to determine if what the client wants the house to be is in alignment with what the house and neighborhood want the house to be. Many times there's a difference between the two and this difference can lead to a wonderful home that accommodates the client and the context.



Photos

Pictures provide a record of existing

Zoning Data

Each village regulates the size, type, and location of structures that can be constructed on each lot. The architect obtains this zoning data from the village prior to starting design work to ensure that the project can be built or if a variance from the zoning requirements should be requested.

FLOOR AREA CALCULATOR

Type the size of your lot in the **Lot Size** column next to the range which best describes it. Please refer to the instructions on the back of the "Calculator" tab.

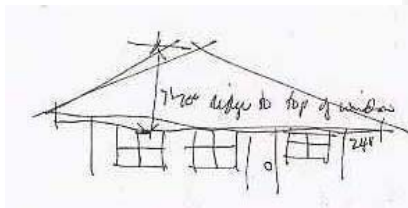
(This will result in the floor area calculation on your screen in order to use the calculator.)

Lot Size	Lot Size	Maximum Floor Area	Maximum Floor Area
< 1,240	0	Enter a Lot Size	Enter a Lot Size
1,240 - 1,999	0	Enter a Lot Size	Enter a Lot Size
2,000 - 2,999	0	Enter a Lot Size	Enter a Lot Size
3,000 - 3,999	0	Enter a Lot Size	Enter a Lot Size
4,000 - 4,999	0	Enter a Lot Size	Enter a Lot Size
5,000 - 5,999	0	Enter a Lot Size	Enter a Lot Size
6,000 - 6,999	0	Enter a Lot Size	Enter a Lot Size
7,000 - 7,999	0	Enter a Lot Size	Enter a Lot Size
8,000 - 8,999	0	Enter a Lot Size	Enter a Lot Size
9,000 - 9,999	0	Enter a Lot Size	Enter a Lot Size
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99,000 - 99,999	0	Enter a Lot Size	Enter a Lot Size
100,000 - 100,999	0	Enter a Lot Size	Enter a Lot Size

* Floor Area (F.A.) is determined by compliance with conditions as specified in Section 1.30.10.3.1 of the Code of Municipal Park Zoning Code.

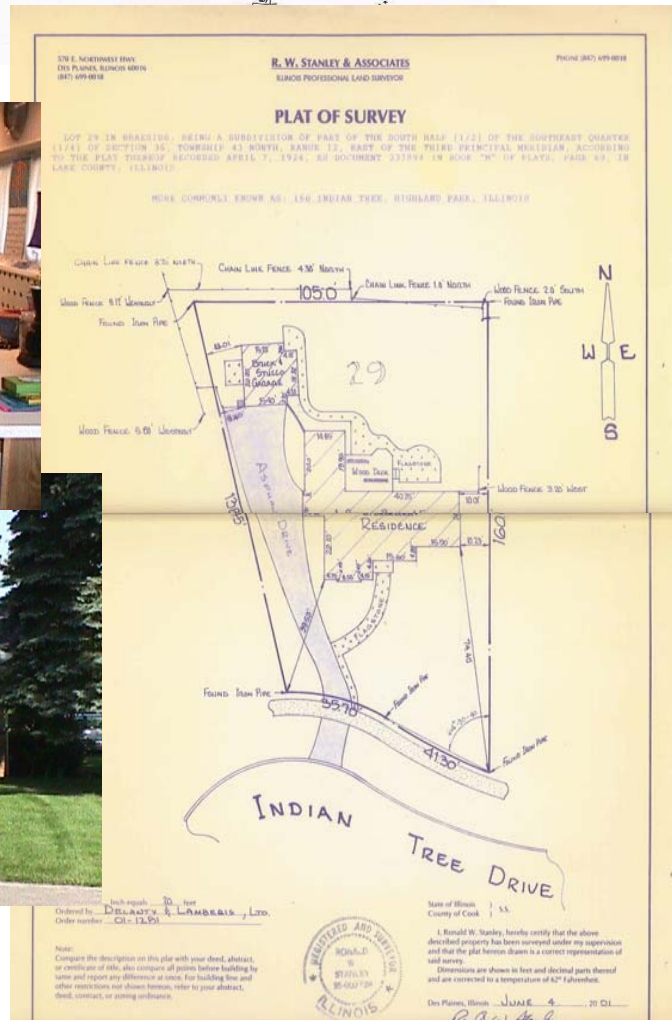
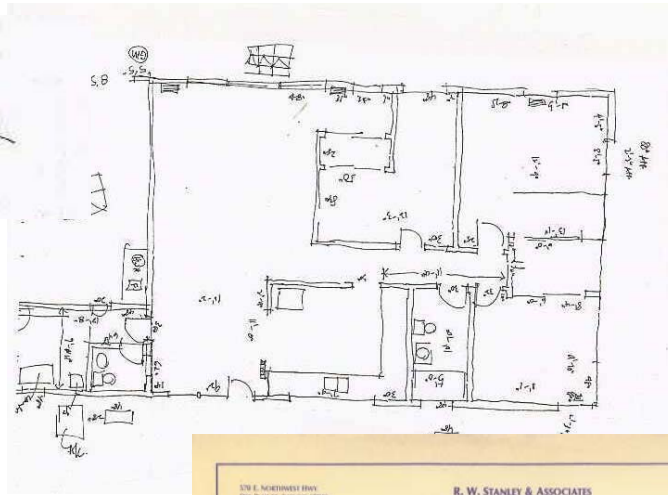
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4. EXISTING CONDITIONS—DOCUMENTING WHAT’S THERE



Measured Plans & Elevations

Provides locations of all existing walls, windows, doors, plumbing fixtures and mechanical equipment. Is a graphic representation of the home's spatial organization and traffic pattern. Provides ceiling heights, overhang dimensions, roof pitches, as well as window and door dimensions and locations.



Plat of Survey

Provides accurate dimensions and other information for the property. This information is required to establish setbacks and other zoning data (such as lot coverage).

5. CONCEPTUAL DESIGN – SETTING THE TONE

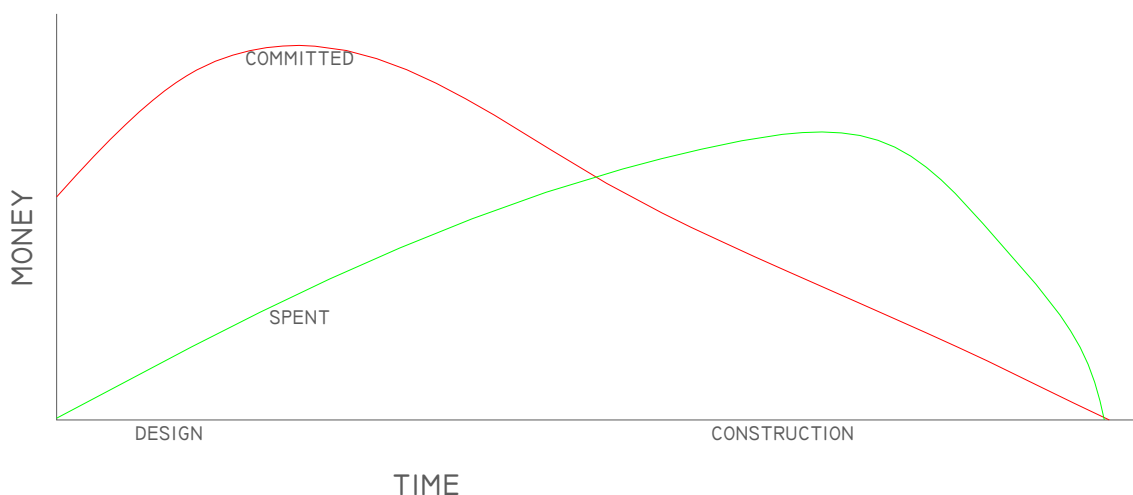
During the conceptual design phase, I'll start to translate your program into a design that can be constructed. I'll look to combine what your existing house wants to be with what you want it to be. Possible design solutions are developed as quick, freehand, thumbnail sketches allowing you and me to readily test design ideas.

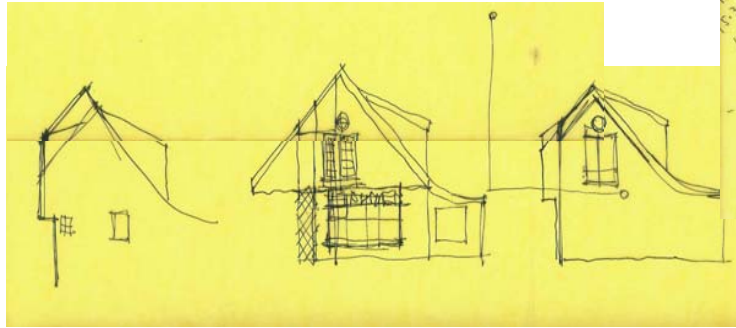
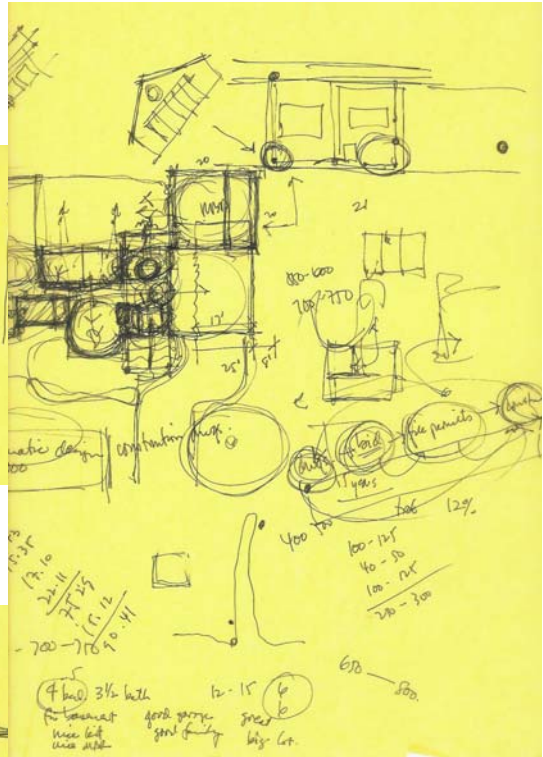
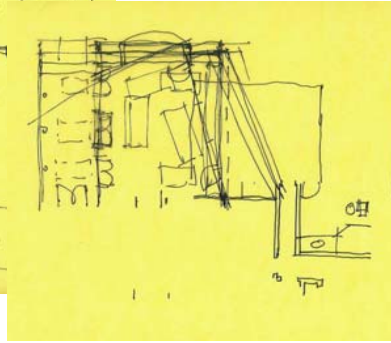
These sketches can take the form of bubble diagrams which are graphic portrayals of spatial organization (how rooms are arranged and connected by traffic patterns). Bubble diagrams are sketched quickly to allow us the opportunity to look at any number of design solutions that meet the programmatic requirements. Each sketch is evaluated against the program, enabling you to make a decision regarding the preferred spatial organization.

In concert with the bubble diagram, I'll study sections and elevations of the project. Massing, fenestration (window and door openings), and style are all quickly studied. These studies are also evaluated against the program to assess which solution is the best fit to the program and site.

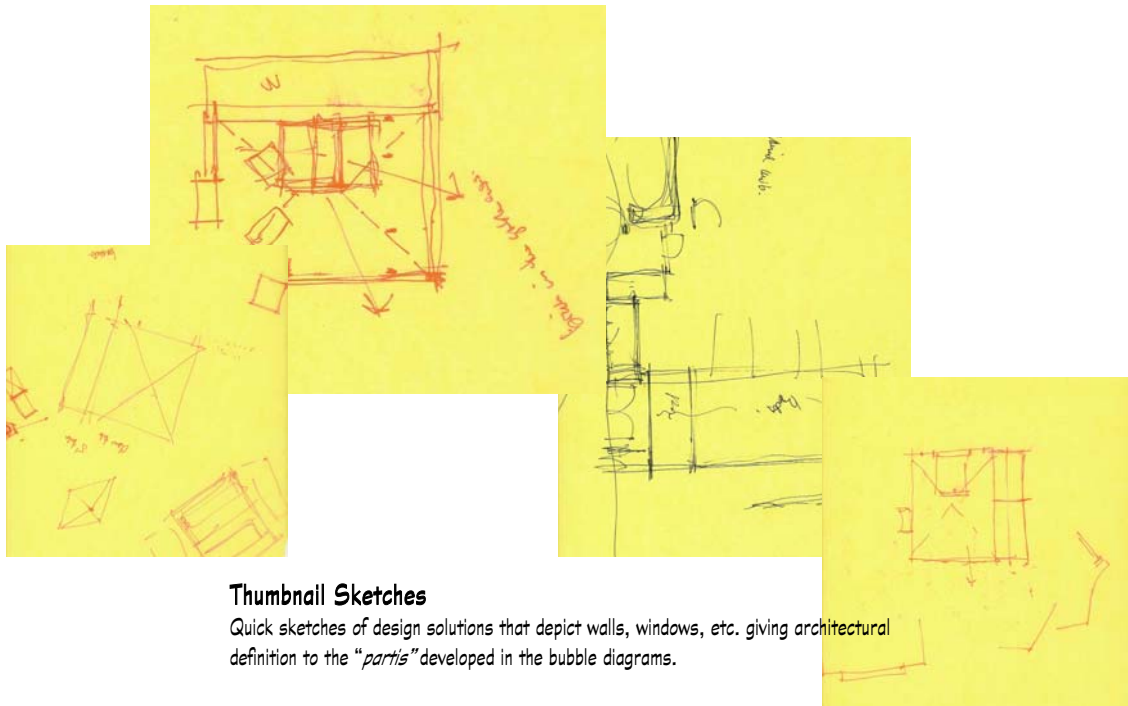
A well conducted conceptual design phase is critical to the success of the project as decisions that effect budget, function and your ultimate satisfaction are being made. To be successful, we must be open minded, creative, and keep asking "what if we...?" to arrive at the best solution. So this is the time, when your costs are low, to rearrange walls, try different approaches and "think outside the box."

The following chart graphically portrays the difference between monetary commitment and monetary outlay. Your actual cash outlay is minimized during the design phase of your project while certainly the opposite is true during construction. So it's during the design phase that you'll want to move walls and test options. It may be obvious that moving walls during construction is expensive but it happens all too often when the design phase hasn't been well thought through.





Quick sketches of design solutions depict organizational attributes of rooms and circulation between / through rooms.



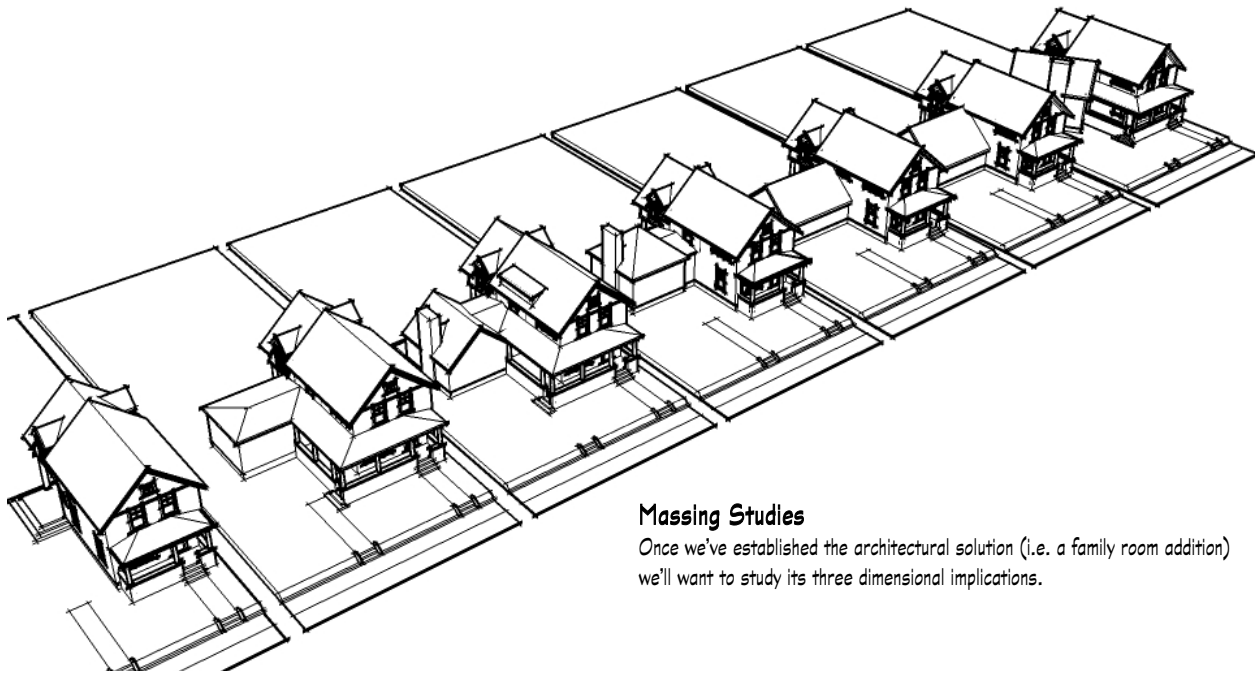
Thumbnail Sketches

Quick sketches of design solutions that depict walls, windows, etc. giving architectural definition to the "partis" developed in the bubble diagrams.

6. SCHEMATICS – ESTABLISHING THE PROJECT’S DESIGN

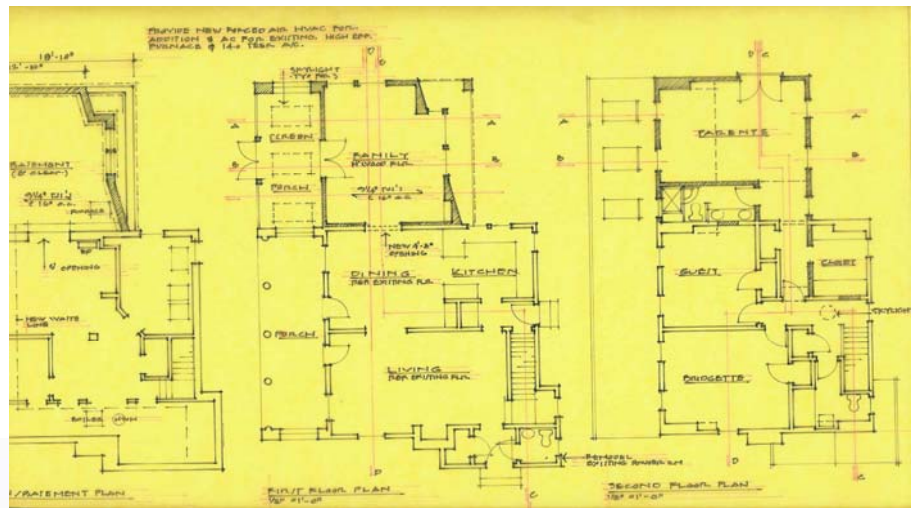
Once you have approved the conceptual design, I'll start working on the schematic design. Schematics are the drawings and preliminary specifications that define the project. Spatial organization (room and circulation layout), exterior massing and style are all defined and major materials are specified. Furniture, cabinetry, appliances and equipment are all placed within the spaces to ensure that things fit and function as you want.

Schematics are also evaluated for potential construction costs so that budget compliance can be confirmed. This is the time, prior to your making a significant investment in drawings, to determine if the construction cost will exceed the budget and to determine whether we adjust the design or the budget.



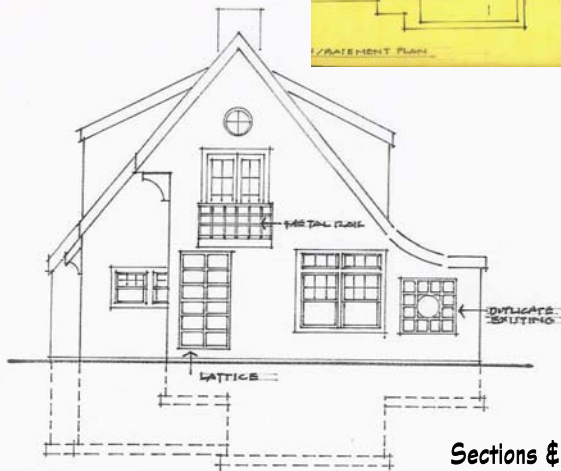
Massing Studies

Once we've established the architectural solution (i.e. a family room addition) we'll want to study its three dimensional implications.



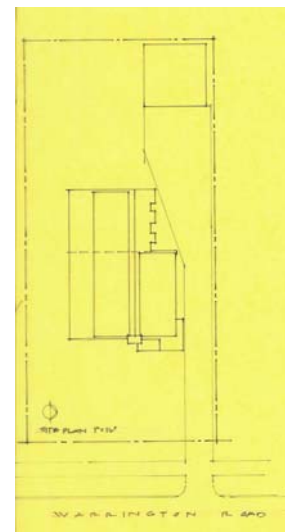
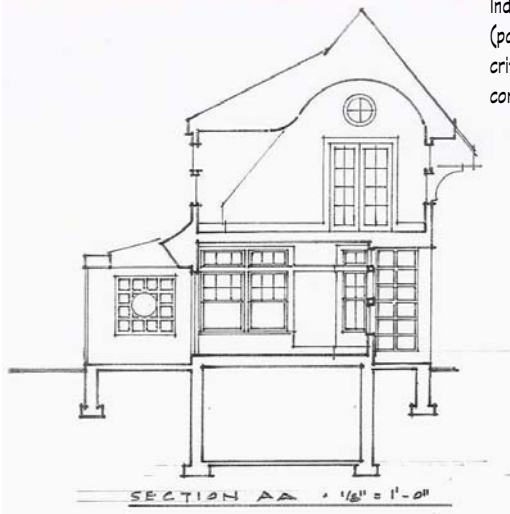
Plans

Floor plans define locations for walls, windows, doors, stairs, cabinetry, furniture, equipment, and fixtures. Functional labels are given to spaces (living room, kitchen, bedroom, etc.). Sizes of new rooms are indicated.



Sections & Elevations

Indicate window and door locations, special features (porches, dormers, etc.) height, and massing. Also critical to an understanding of special ceiling (volume) conditions



Site Plan

Indicates property limits and location of new and existing structures. Also indicates compliance with zoning requirements (or if a variance is required because of non-compliance).

7. DEVELOPING THE DESIGN – SYSTEMS & MATERIALS

Design development is the design phase when we'll select major systems and materials. Systems to be researched, evaluated, and incorporated into the project's design include structural, mechanical (HVAC and plumbing), and electrical components. Materials to be researched, evaluated and selected include exterior items (roofing, windows, doors, siding, soffits, gutters and downspouts, etc.) and interior items (floors, walls, ceilings, doors, hardware, trim, stairs, railings, etc.).

You will use my assistance, guidance, experience, and expertise to select these items. And I'll prepare drawings and models to aid you in visualizing the implications of these decisions and selections. These drawings can range from freehand studies to "finished" models.

I'll incorporate the new information into the drawings once the selections are approved by you.



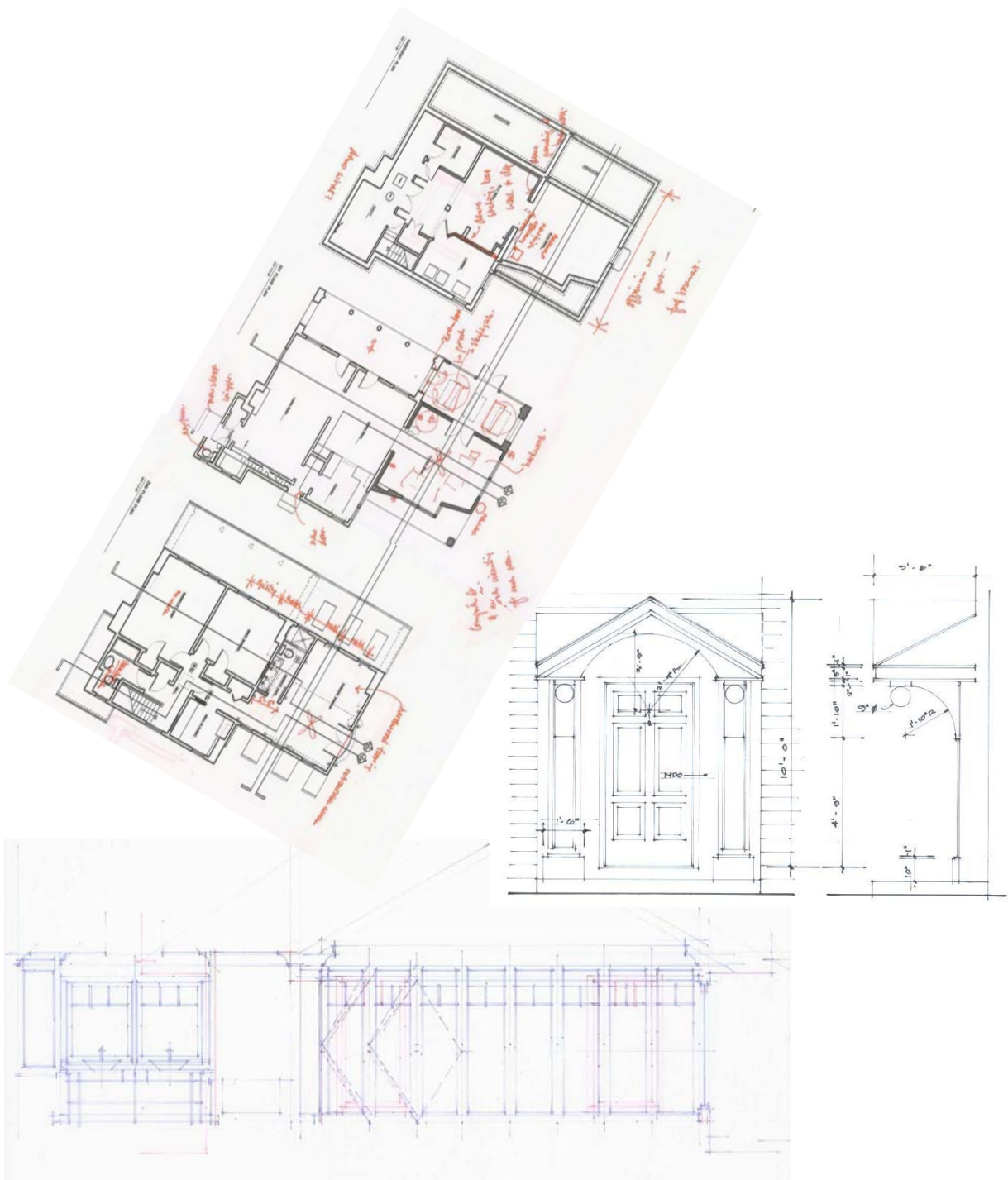
Models

We like to build models of the project and parts of the project. So these models will range from the overall exterior to interior spaces to details.



Interior & Exterior Views

Aids in visualizing the overall look and feel of the house.



Detail Sketches & Redlining

Prior to finalizing drawings for the project we hand draw and study detailed areas such as the entrance. We also review and edit the drawings.

8. CONSTRUCTION DRAWINGS – RECORDING DECISIONS

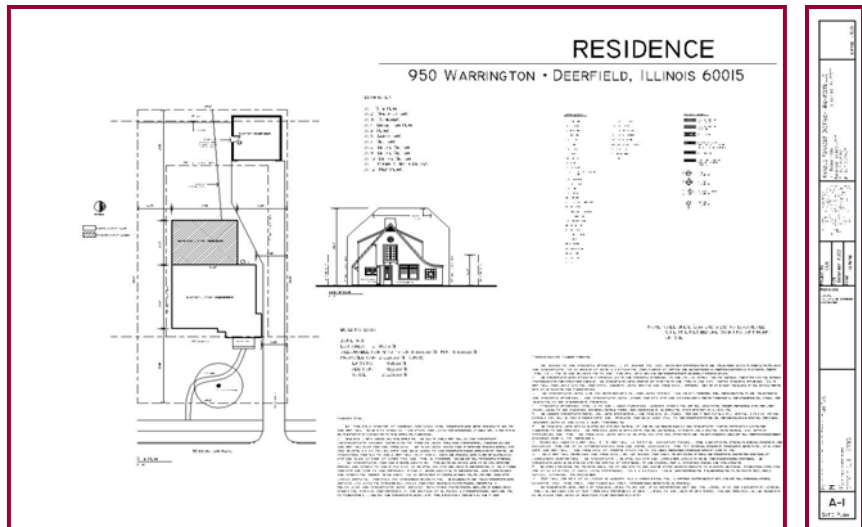
Construction drawings are a graphic and written record of the decisions made during the design process. These documents are the vehicle through which design decisions are communicated to others including permitting authorities, lenders, and builders. A set of construction documents should be complete, concise, and coordinated.

- Complete in that all of the information is included so that a full understanding of the project can be had. The drawings are considered complete if all of the information that a builder needs to construct the project is adequately displayed. A complete set of construction drawings differs from a permit set of drawings in that a permit set, though satisfying the requirements of the local building department when issuing a building permit, won't provide all of the information needed for construction. Though having a higher initial investment, a complete set of construction drawings saves time, money and frustration during the project's construction because changes and subsequent cost increases and delays are minimized.

The left side of the sheet is the drawing field where the project's construction details will be located. Containing both graphic & written information, this is where all the decisions you've made regarding the project will be recorded.

A typical complete set of construction drawings should include:

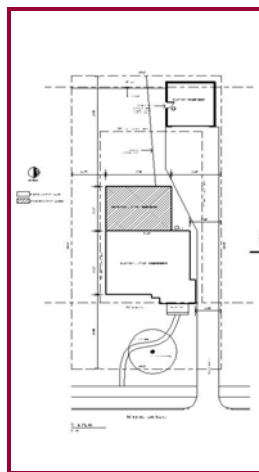
- Title Sheet
- Specifications
- Schedules
- Demolition Plans
- Plans (Foundation, Floor & Roof)
- Elevations
- Sections
- Wall Sections & Details
- Interior Elevations & Details
- Cabinetry Details
- Reflected Ceiling Plan
- Mechanical & Electrical Plans & Notes



A title block is generally located on the right side for ease of reference. The title block contains the project's title, date of the drawing, who the architect is, and a space to identify when and how the drawing has been revised. The title block also contains the drawing number and drawing title.

- Concise construction drawings can assure that information is consistent and relevant. Duplicated information or unnecessary details only confuse the scope of work.
- Coordinated documents are essential to minimizing construction delays, misunderstandings, and subsequent cost overruns. Coordinated documents are consistent from sheet to sheet in that the same project with the same details is described.

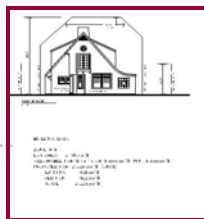
It's not uncommon for an architect to earn about 50% of the total fee for services when preparing the construction drawings. This directly equates to the amount of time that the architect spends preparing these very detailed drawings.



Because the drawing set is organized from the macro to the micro (or from the general to the particular), the first graphic that will be provided is the site plan. The site plan describes the position of the project on the site and how the project complies with zoning regulations (i.e. setbacks).



950 V
A list of the drawings that comprise the drawing set is included on the Title Sheet. This list is the "table of contents" that identifies what information is where.



Most municipalities will have height and bulk restrictions. Graphic and written data provided on this sheet indicates these regulations and how the project is in compliance.

RESIDENCE

15

Title Sheet

The first sheet in the set, this page is similar to a book's cover, content and foreword.

Information provided on this sheet includes that concerned with any municipal regulations that govern the general characteristics of the project. A site plan and other drawings identifying how the project complies with these regulations (setback dimensions, height restrictions, bulk restrictions, etc.) are provided. Placing this information up front enables the reviewing authority to readily identify the project's compliance with the regulations.

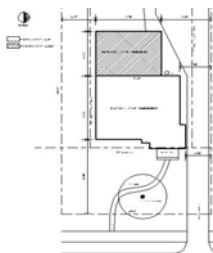
Other information includes a list of the drawing sheets that comprise the set (a table of contents) as well as a legend for the various abbreviations and symbols used in the project.

RESIDENCE

RESIDENCE

IN • DEERFIELD, ILLINOIS 60015

For efficiency, the drawings will contain abbreviations and symbols. A legend is provided so the user of these drawings can interpret clearly these .



General notes that identify critical project information are included on this sheet. These notes may concern municipal regulations (working hours, erosion control, tree protection, etc.), utility locator services and other like items.

In as much as a specification defines what a project is, the specification can be proprietary ("all windows will be as manufactured by Marvin") or generic ("all windows will conform to the standards set down by the WMA"). While a proprietary specification will give you more control over the exact outcome of the project, a generic specification provides for some price flexibility when determining the project's costs.

1. 本報社址：台北市中正區中山路100號。電話：(02) 2312-3456。

1. The first step is to identify the problem. This involves understanding the current situation and what needs to be changed. It is important to involve all stakeholders in this process.

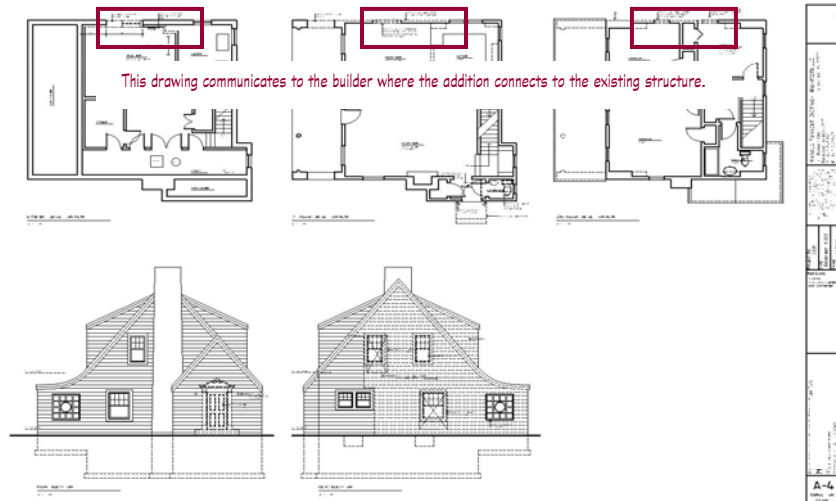
1. 凡在本市行政区域内从事生产经营活动的法人和其他组织，均应当依法缴纳城市维护建设税。

Some of the schedules relate to the building code and how the project complies with the code. For example, the light and vent schedule indicates the amount of natural light and ventilation each habitable space will have and how this meets or exceeds the code minimums.

[illegible][illegible][illegible][illegible]

The plumbing fixture count identifies the existing and proposed number of plumbing fixtures. Used to determine any upgrades that may be required to the water and / or sewer systems.

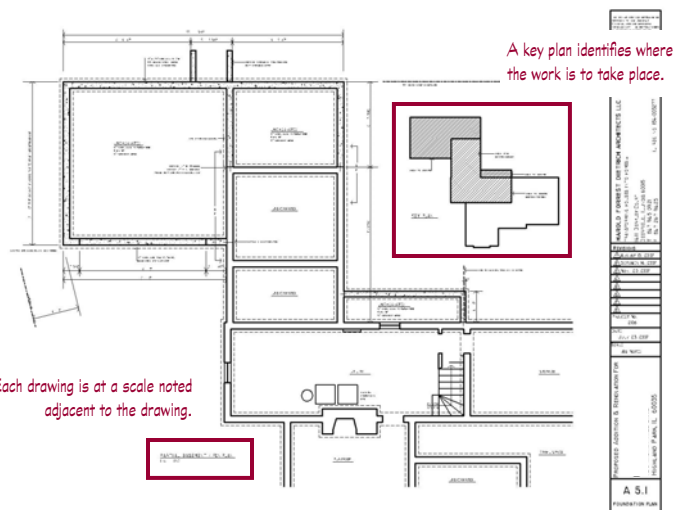
8. CONSTRUCTION DRAWINGS – RECORDING DECISIONS



Demolition Plans

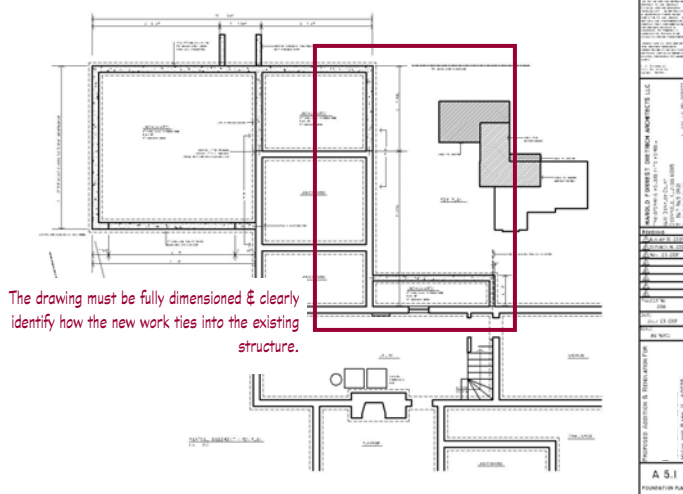
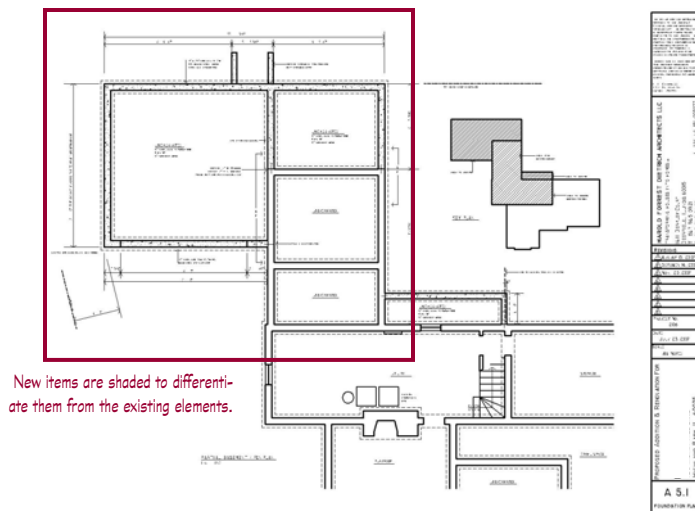
A certain amount of demolition is required in any home renovation. The demolition drawing communicates to the builders where any demolition is to occur and what is to be removed. The demolition drawing can also identify any temporary facilities (such as a temporary kitchen) that may be needed to accommodate you during the construction.





Foundation Plan

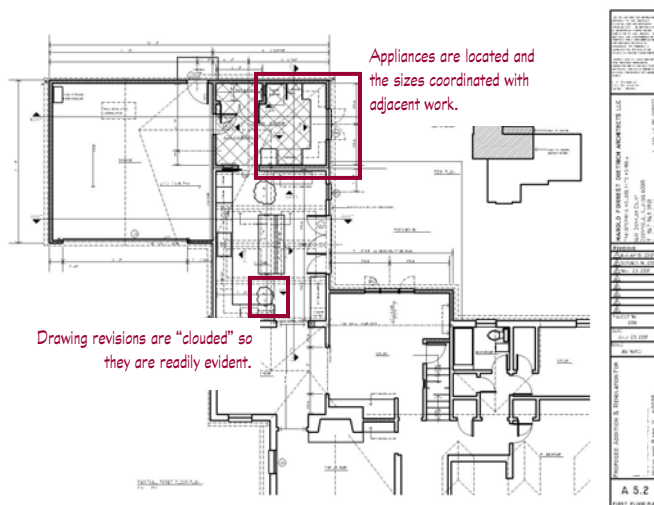
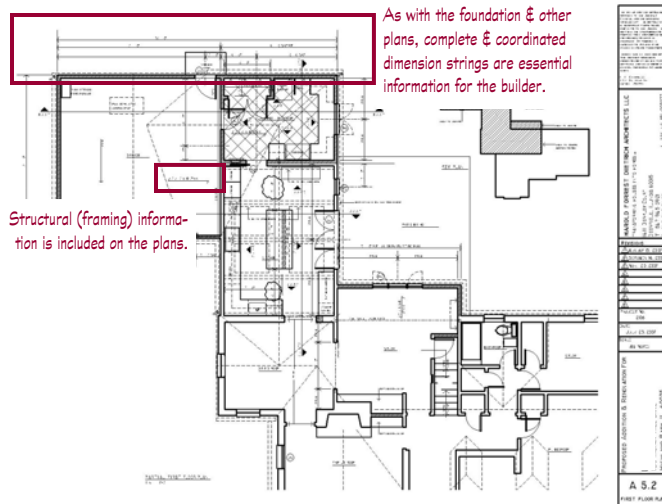
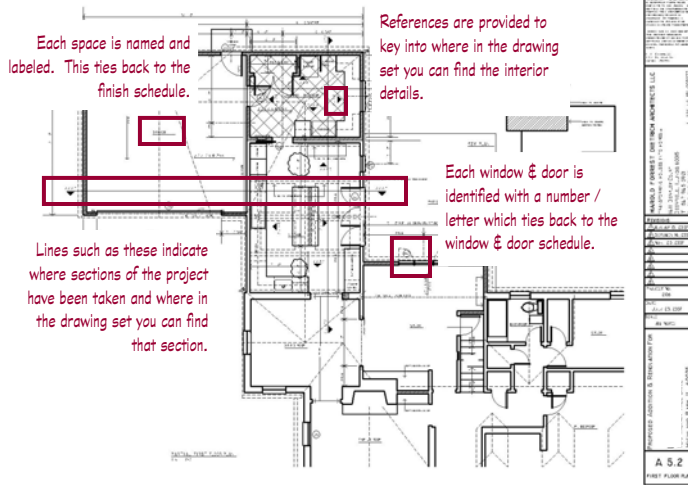
The foundation plan is the drawing that fully & clearly communicates the extent of the construction work. Therefore, it's important that the size, scope, relationship to the existing structure and relationship to the property lines be clearly shown. It's also important that critical items, such as dimensions that cannot be altered, be clearly noted and called out.



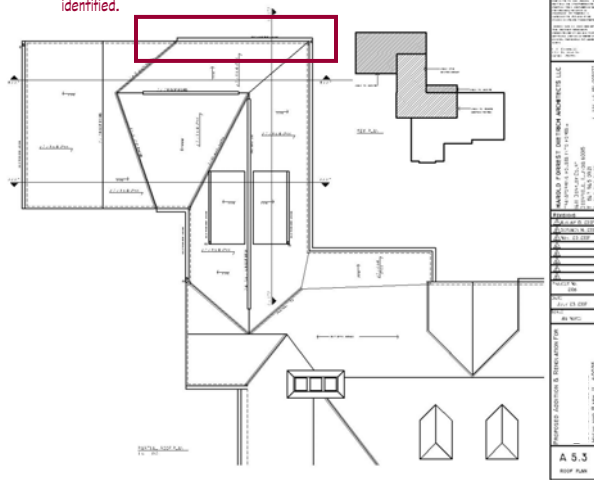
8. CONSTRUCTION DRAWINGS – RECORDING DECISIONS

Floor Plan

The floor plans communicate quite a bit of information as well as provide keys to where to find more, detailed information. Information conveyed on floor plans includes room sizes, door and window opening sizes and locations, floor finishes, cabinetry and built-in locations, structural components, plumbing fixture and appliance locations, etc. A well dimensioned floor plan can be a great aid to the contractor as it saves time in the field as well as lessens the possibility for incorrect wall, window and door locations.



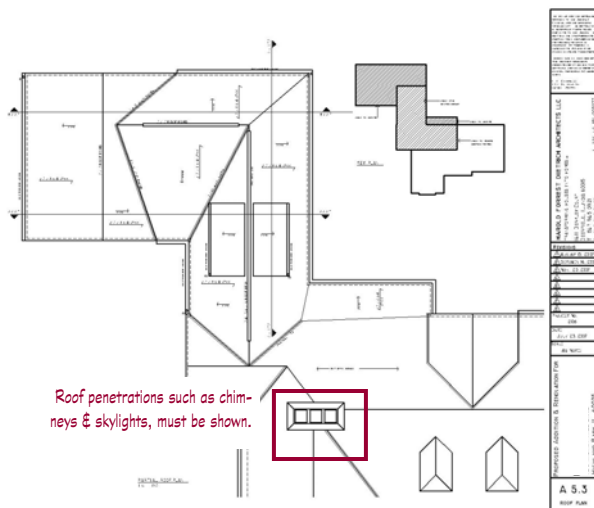
Gutter & downspout locations are identified.



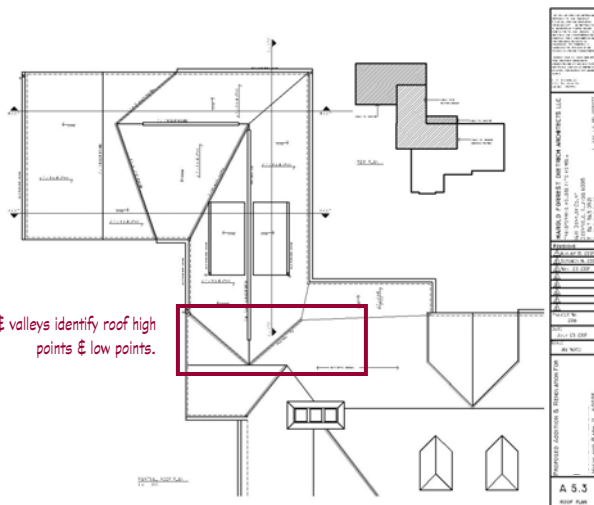
Roof Plan

A roof plan identifies the shape, structure and other features of a roof. A well thought out and detailed roof plan will go a long way in helping you understand how to keep water out of your home. Ridges (high points) and valleys (low points) are identified so the appropriate measures can be taken to shed water. Roof penetrations such as skylights & chimneys are also indicated so that they can be located properly and details developed to prevent water from entering the home. Gutters & downspouts are located & identified as well.

Roof penetrations such as chimneys & skylights, must be shown.



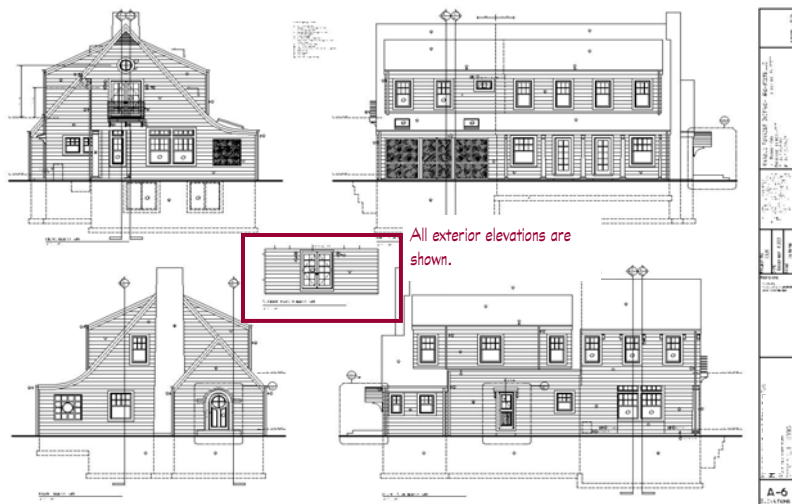
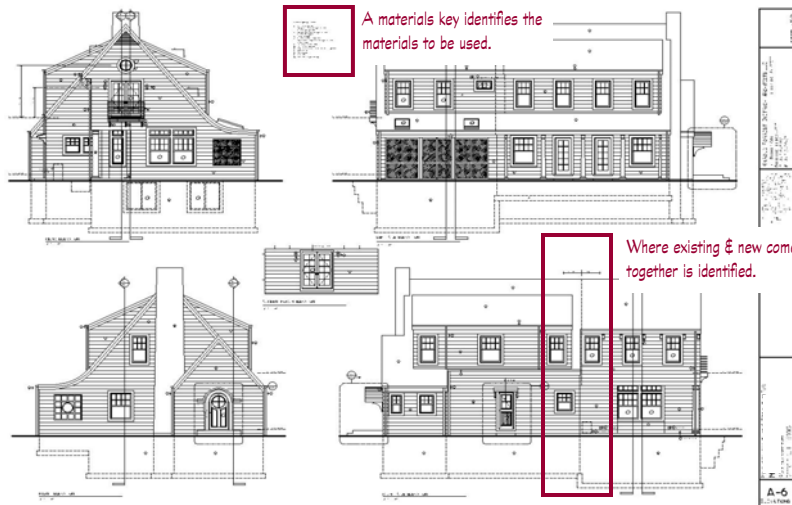
Ridges & valleys identify roof high points & low points.



8. CONSTRUCTION DRAWINGS – RECORDING DECISIONS

Elevations

Elevation drawings communicate what the exterior look and materials will be. Window and door style, size, location and configuration are all portrayed. Roof pitch, gutter and downspout locations are identified.





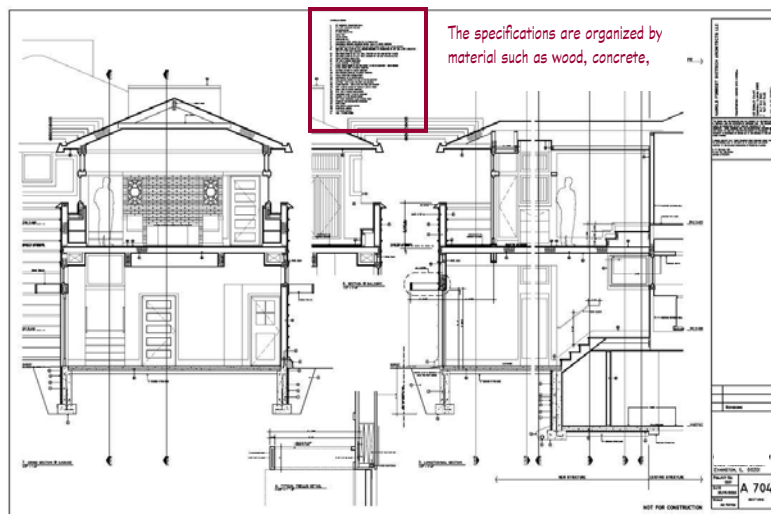
Sections

Sections are slices through the project as are plans. Whereas plans are horizontal slices, sections are vertical slices. While plans tell us how we understand the interrelationship of spaces and what is in a space, a section tells us how we'll experience a space. Only by developing a series of sections for a project can we get a full understanding of the spatial qualities of a structure.

Sections communicate to the builder an understanding of these spatial experiences. Sections also communicate to the builder how we want each piece to be assembled and fit with the adjacent pieces.



8. CONSTRUCTION DRAWINGS – RECORDING DECISIONS

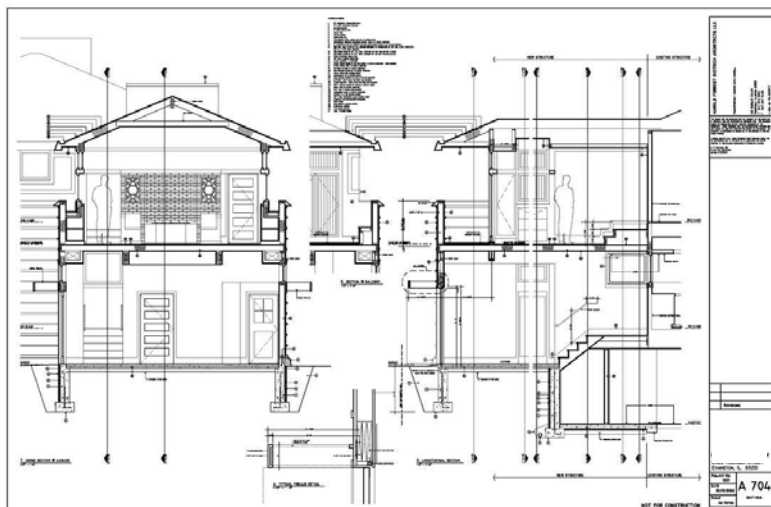
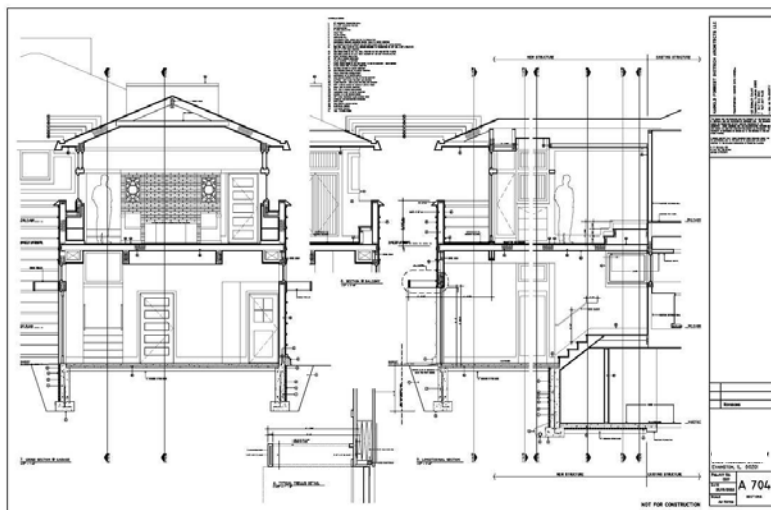


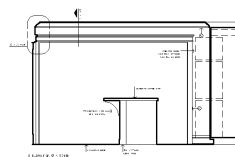
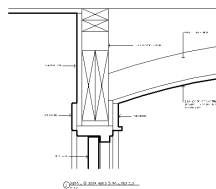
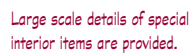
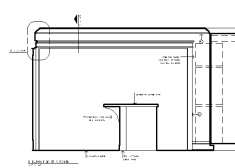
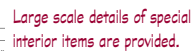
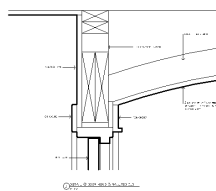
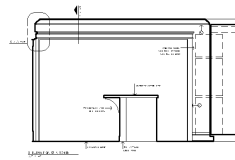
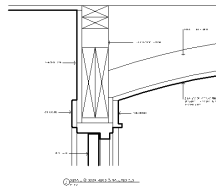
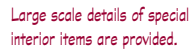
Wall Sections & Details

The drawing sets consists of both written and graphic information. While the graphic information (the drawings) describe the size of each piece, its location within the project & how all the pieces fit together, the written information (the specifications) defines what each piece is (material, manufacturer, standard, etc.). Specifications, which are usually a separate bound document on more complex and larger projects, are organized into standard sections (general, wood, concrete, metal, etc.).

In as much as a specification defines what a project is, the specification can be proprietary ("all windows will be as manufactured by Marvin") or generic ("all windows will conform to the standards set down by the WWMA"). While a proprietary specification will give you more control over the exact outcome of the project, a generic specification provides for some price flexibility when determining the project's costs.

The specifications also identify the review procedures for each product / material. The only way to ensure that the products used are the products you want used is by reviewing the builder's submissions of what the builder intends to use.





Flamingo Kitchen Renovation For Mr. & Mrs. B. BROGSTEN 1212 Linden Avenue A - 9 INTERIOR ELEVATION	HANDLED FOREST DISTRICT ARCHITECTS, LLC 1450 15th Avenue, Suite 200 San Francisco, CA 94114 Tel: 415.398.7444 Fax: 415.398.7444 Email: info@forestarch.com Website: www.forestarch.com	Project No. 1212 Date: 12/11/12 Scale: 1/8" = 1'-0" Drawing No. 1212-01
	Project No. 1212 Date: 12/11/12 Scale: 1/8" = 1'-0" Drawing No. 1212-01	Project No. 1212 Date: 12/11/12 Scale: 1/8" = 1'-0" Drawing No. 1212-01

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PROJECTED KITCHEN RENOVATION FOR MR. & MRS. B. BOCKSTEIN 1502 Linden Avenue A - 9 INTERIOR ELEVATION		DRAWN BY: J. BOCKSTEIN DATE: 12/1/81 SCALE: 1/4" = 1'-0" PROJECT NO.: 1502 LINDEN AVE CLIENT: MR. & MRS. B. BOCKSTEIN ADDRESS: 1502 LINDEN AVE CITY: ST. LOUIS, MO 63104 PHONE: (314) 435-1234 ARCHITECT: J. BOCKSTEIN FIRM: J. BOCKSTEIN & ASSOCIATES, LLC ADDRESS: 1502 LINDEN AVE CITY: ST. LOUIS, MO 63104 PHONE: (314) 435-1234
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8. CONSTRUCTION DRAWINGS – RECORDING DECISIONS



Cabinetry Details

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The specifications also identify the review procedures for each product / material. The only way to ensure that the products used are the products you want used is by reviewing the builder's submissions of what the builder intends to use.

9. BID DOCUMENTS – GETTING THE RIGHT BUILDER

In many though not all instances I assist the client in obtaining a builder for the project. To do this I'll prepare and assemble the bid documents (construction drawings, invitation to bid, bidder instructions, and form of agreement) and advise you on potential bidders. These bidders should be all of the same type of contractor to ensure the bids are truly “apples to apples.”

Builders, like architects and others, have their way of working and delivering a project to the owner. Therefore, though not a necessity, it's better that the builder and I have had a previous working relationship. We have learned to dance together before getting to your project. This can reduce the stress placed on you during construction.

Once the bids are received, we'll review, analyze and evaluate the proposals. I'll then make a recommendation as to the right builder.

At times the bids are more than the budget. This is usually the result of “scope creep” without adjusting the budget. To avoid this scenario you, with my counsel, should establish a realistic budget and I'll keep you aware of scope changes that require an adjustment in the budget.

Though you may want to have your attorney review the form of agreement that you'll sign with a builder, it's my recommendation that you start with a standard AIA contract. There are some builders who will want you to sign their own form of agreement—telling you that the AIA form is too one sided in your favor. This is simply not the case. These contracts have been developed over many years with feedback from owners, architects and builders. Making these documents fair to all parties and a good basis for entering into an agreement with the contractor to improve your single most valuable asset.

AIA Document A191
Standard Form of Agreement
Between Owner and Contractor
for a Small Project
where the Basis of Payment is a STIPULATED SUM
1993 SMALL PROJECTS EDITION

Because this document has important legal consequences, we encourage you to consult with an attorney before signing it. Some states mandate a cancellation period or require other specific disclosures, including warnings for home improvement contracts, when a document such as this will be used for Work on the Owner's personal residence. Your attorney should insert all language required by state or local law to be included in this Agreement. Such statements may be entered in the space provided below, or if required by law, above the signatures of the parties.

This **AGREEMENT** is made:
(date)

BETWEEN the Owner:

and the Contractor:

for the following Project:

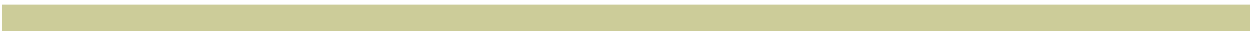
The Architect is:

The Owner and Contractor agree as follows.

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AIA Documents

Industry standard documents that provide for a contractually sound basis for your project.

10. CONSTRUCTION ADMINISTRATION – BUILDING THE DESIGN

Though the architect is not responsible for the means and methods of construction nor is the architect responsible for guaranteeing the quality of the construction work, the architect can provide valuable services during construction.

During the construction phase of the project I act as your advocate. I'll inspect the work and advise you regarding design compliance. I'll also review and advise you on the appropriateness of change orders.

Of the functions I can perform during construction, the most important are:

- Being available to you through good and bad.
- Helping the builder understand the design intent.
- Ensuring that decisions made during construction are consistent with decisions made during design.

Sometimes a client won't ask me to provide construction administration services. However, construction administration is of critical importance to your ultimate satisfaction with the project. This is when I'll act as a bridge between the design and the construction activities, ensuring that the decisions you make during construction are consistent with those you made during design. And it seems inevitable that the client later rues their decision not to have me provide construction phase services.

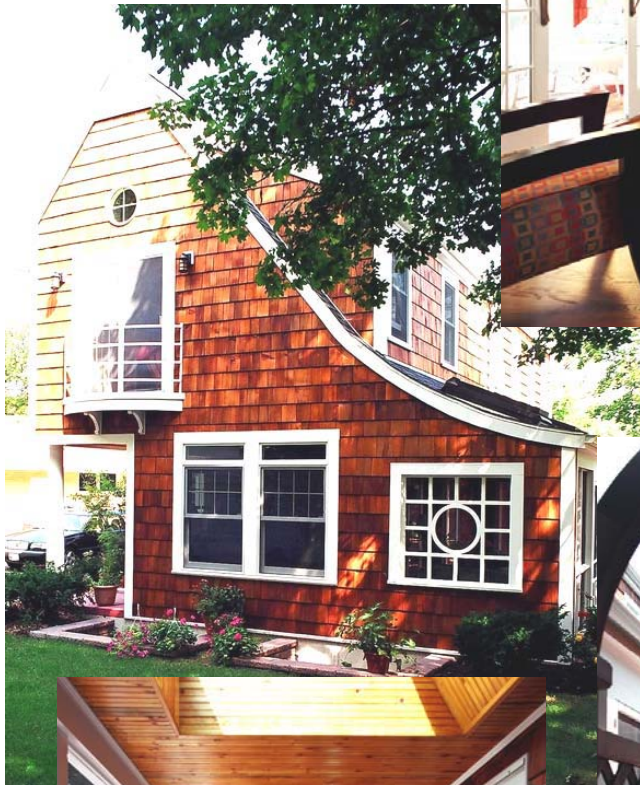
Some of the services I can perform during this phase and for which the American Institute of Architects provides standard documentation for include:

- Change Order administration including evaluating and advising you when the builder requests a change order, issuing the necessary change order and keeping a log of the current contract sum.
- Certifying the contractor's application for payment including evaluating the work done compared to the requested payment.
- Issuing supplemental instructions to the builder when the instruction clarifies a design issue while not incurring any additional cost to you.
- Issuing field reports documenting contractor activity, compliance of the work with the design intent, etc.

Certainly my providing you construction phase services will alleviate the stress that you will feel during construction.

11. OCCUPANCY – ENJOYING YOUR NEW HOME

Sure you ran over budget and schedule. And there were times when you couldn't believe that you were undertaking the project and your friends thought you insane. But after months of hard work, inconvenience and considerable effort and expense, your "new" home is ready for you to live in and enjoy. The finished project is all that you expected and more. Your new home transcends the utilitarian because the design was well thought out. Whether it's the way the light moves through the home, the ways in which views are framed, the harmony of inside and outside, or all of these and more, you delight in the life your new home fosters.





12. DEFINITIONS

Architect

The person licensed by the State where the project will be built to provide architectural services. Not to be confused with an architectural designer, a residential designer or similar who aren't licensed and therefore unable to provide architectural services nor held responsible to protect the health, welfare and safety of the public. The architect is responsible for preparing the drawings and specifications that will be used to secure municipal approvals (permits, variances, etc.) and to construct the project.

Approved Equal

Material, equipment, or method proposed by the contractor and approved by the architect for incorporation in or use in the work as equivalent in essential attributes to the material, equipment, or method specified in the contract document.

Bidding

This is when the contractor, or builder, is hired. The construction drawings are packaged with a pro forma agreement (and any other documents you wish) and issued to prospective contractors to submit a bid for the project. Complete construction drawings are a key to obtaining bids that are truly comparable and an accurate reflection of the project's construction cost.

Builder

Sometimes referred to as the *contractor*, this person, or persons, will use the construction drawings to construct the project.

Building Codes

Sometimes referred to as "*codes*" or "*code*", these are the regulatory statutes that establish certain minimum standards to which any building must comply. Building codes address public health and safety issues and, as such, should be used only to provide a starting point for the design.

Budget

This is the amount of money allocated for the *project*. Though the largest slice of the budget is the money allocated to the construction (bricks and mortar), there are other costs. These other costs can include the architect's fee, permit fees, furniture, appliances, window treatments, etc.

Conceptual Design

This is the design phase when you and your architect talk about how what you want (your *program* or wish list) gets translated into a *project*. Rather than fixating on one solution, have your architect prepare quick, rough sketches (the napkin sketch) so you can evaluate the pros and cons of each. This is the best time to look at as many solutions as possible. Brain storming, bouncing around ideas, asking "What if we. . ." and more are strategies for identifying the right design solution for you. Looking at options early on means you'll avoid the "I should have done . . ." statements later when changes are too expensive and time consuming to make.

Construction

This phase of the project is when the plan gets implemented. This is when you start to see "bricks and mortar" and other materials arrive on your property (the site) to get assembled. Teams of workers install the materials in accordance with the *construction drawings*. This is the most stressful portion of the project for many homeowners, especially if you're engaged in a remodeling project. Rather than going it alone, the construction phase will go much more smoothly if you have your architect provide *construction administration services*.

Construction Administration Services

Provided by your architect during construction, these services can include certifying contractor application for payment, monitoring the construction for compliance with the *construction drawings*, etc. As the person who has prepared the construction drawings, the most important service your architect can provide at this stage is to help you decide what to do when questions arise during the construction phase.

Construction Drawings

Commonly referred to as "*blueprints*", these are the drawings that will be used to communicate your intentions to others (builders, bankers, building departments, etc.). As such, it's a good idea to think of these drawings as a record of all the decisions you've made regarding your project from the very global decisions (size, location, etc.) to the very detailed decisions (window hardware finish, trim profiles, tile selections,

etc.).

It's also best to put together a good and complete set of construction drawings so that your intentions are communicated clearly to others. This will certainly allow you to have better control over your final cost at the start of *construction* as well as eliminating the stress of having to make decisions on the fly during *construction*.

Design Development

During this *design phase* you and your architect will refine the design. You'll identify and select the materials and finishes as well as develop the details that will be incorporated into the construction drawings and used for *construction*.

Doors

A barrier between two spaces that can be operated to allow a connection between the spaces. Indicated on the drawings in at least two if not more places:

- Graphically in plan
- Graphically in elevations and sections
- Written in the specifications
- Written in a schedule

Elevation

A two-dimensional representation of the project's exterior (and sometimes interior) faces. Typically viewed from outside the project, an elevation includes exterior materials, windows, doors, roof shapes, etc. We often refer to the style (colonial, Tudor, French, etc.) of a house when we are talking about the exterior.

Parti

From the French verb for departure, *parti* is the start point for the design. Sometimes referred to as the "big idea", a *parti* is a graphic representation of the central design theme that will get developed and built.

Plan

Often referred to as a "*floor plan*", a two-dimensional representation of the project's horizontal plane. Typically viewed from above, the plan view shows the horizontal spatial relationships and circulation patterns. Also shown are doors, windows, walls, cabinetry, furniture, equipment, etc. Plans are useful for determining how one moves about a space or series of spaces and how one can actually use a space.

Program & Programming (deciding what to build)

A program is essentially your wish list. This is the phase of the project when you establish your needs, wants, dreams and desires. Don't think in spatial terms. Rather, think about "where it hurts." Your architect will help you identify the "pain points" so that the design solutions address the real problem.

Project Delivery

This is the phase when we bid or negotiate for the construction activities using the construction drawings and other documents (AIA standard forms of agreement, AIA general conditions, etc.) that can be supplied by your architect.

Design / Bid / Build

There are separate contracts with an architect and a builder.

Money is more important than time or convenience.

Provides checks and balances.

Design / Build

There is one contract with a design builder.

12. DEFINITIONS

Convenience is more important than cost.
There are no checks & balances.

Schematic Design

During this *design phase* you and your architect will begin to refine one or more design options so that you can better evaluate the respective pros and cons. This is done by providing precise dimensions and an *outline specification* of the materials you'll incorporate into the project. You'll also be able at this point to have a *schematic design estimate* developed that will identify likely project costs.

Section

A two-dimensional representation of the project's vertical plane from a vantage point inside the project. The section view shows floor levels, ceiling heights, and other information that describes the overall character of a space.



13. BIBLIOGRAPHY & RESOURCES

Books

The Place of Homes, C. Moore

First published in the 1970s by prolific architect and educator C. Moore, this recently republished book shows the importance of making one's house more than just blank space. Moore speaks of the quality of light, space, views, and organization as well as how these architectural elements can create a memorable home.

A Pattern Language, L. Alexander

A compendium of simple ideas based on time-tested patterns, particularly appropriate to home design. Recently, members of the research team that helped develop these patterns have also published *Patterns of Home* (Taunton Press).

The Not So Big House and Creating the Not So Big House, S. Susanka

These best sellers by architect/author Sarah Susanka explore the notion that the principle ingredient in the making of a home is quality and attention to detail. Though builders and home owners' interest in overly large "McMansions" keeps growing, the public prefers houses that are modest, distinctive, and well crafted. To this end, these two books provide a "blueprint for how we really live".

The Distinctive Home, J. Eck

This book explores the ideas inherent in making a distinctive and memorable home. Topics include a home's relationship to its site, spatial or gaining action, and the importance of well thought out details.

Home as a Mirror of Self, C.C. Marcus

Our homes reflect who we are, where we've been, and what we aspire to. Ms. Marcus explores this theme on a personal level in this book. She identifies how we internalize spatial organization and how different people perceive the same environment. Included are games and exercises that help us understand how we use and perceive our homes.

Movies

Mr. Blandings Builds His Dream House

With Cary Grant and Myrna Loy, a comical view of one family's adventure building their dream home in the suburbs.

The Money Pit

Steven Spielberg's rendition of the same subject with Tom Hanks and Shelley Long as renovators.

Web Sites

American Institute of Architects (www.aia.org)

AIA Chicago (www.aiachicago.org)

Sites for the American Institute of Architects.

The Association of Licensed Architects (www.licensedarchitect.org)

Site of the Association of Licensed Architects. This organization provides assistance to the architecture community in Illinois.

National Kitchen & Bath Association (www.nkba.org)

Resources for kitchen and bath remodeling projects. Includes guides and workbooks, manufacturer links and product descriptions as well as a professionals directory.

The Not So Big House (www.entsobighouse.com)

Site for the best selling books *The Not So Big House* and *Creating the Not So Big House*. An especially useful feature of this site is the community chat area



14. RENOVATION RULES

Most of the houses we've worked on were originally built speculatively. These houses are often in subdivisions where there are many of the same or similar house. These houses were not designed and built for a particular family nor were they built with regard to siting.

Often these house have been expanded and altered but the completed project was not memorable nor distinctive nor responsive to the people's living patterns nor its site. The house still did not speak to the personality of the residents nor did it satisfy their yearning for anything but "more space." In fact, the assumption is that all of the problems would be solved if we add more space. Nothing could be further from the truth.

These houses were, in some instances, worse for the renovation than before. It is as if the vinyl sided spaceship landed on or along side the house. Often the character and quality of the new spaces differs from the original. The completed house ends up with a schizophrenic personality.

So when starting a new project we strive to use the renovation as an opportunity to make something new, memorable and distinctive. This requires more of the homeowner and us. Together we must discover what the house is and what it wants to be. We must learn the house's language and understand what the totality of the house will be. It requires that we be realistic about the budget. It requires that we use thoughtful and balanced approaches that don't bust the bank. It requires that we focus our attention on value creation. It requires that we pursue an integrative and holistic approach rather than one that is piecemeal and schizophrenic.

Rule 1: Add Curb Appeal

A welcoming entry and a front porch from which to view the world go by are hallmarks of good home design. When renovating a house, we look for opportunities to incorporate these features into the project. A welcoming entry should provide visitors with shelter from the elements as well as keeping the mail dry. A front porch doesn't need to be large—just deep enough to allow a few chairs.

We look to make our entries three dimensional—unlike the solely two dimensional, decoration that the house may have had. These three dimensional entries signal to the passersby that we welcome them into our homes. One by passer remarked that the entry on a just completed home renovation was so warm and inviting that it made her want to knock on the door and invite herself in.

It's these elements that add curb appeal and value to your finished home.



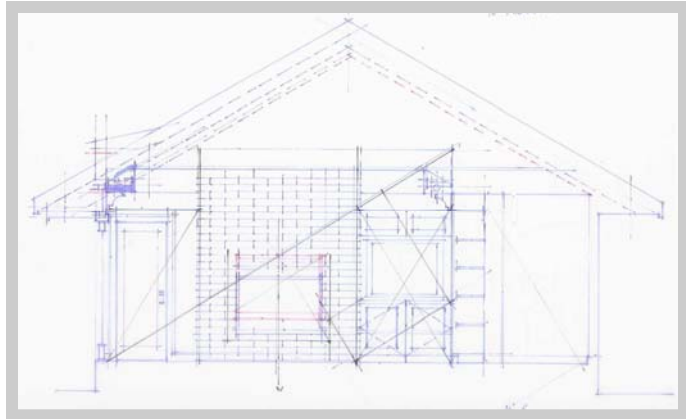
Rule 2: Use Pleasing Proportion & Scale

So many times we see house renovations and additions that neither respect the scale nor the character of the original house. Whether out of fear about extra costs or simple ignorance, these projects always leave us wanting. To avoid this, we follow a few important steps when we start any renovation / addition project.

First, we become intimate and familiar with the existing structure. We learn its personalities and quirks. We study its anatomy including its bones, its skin, its eyes and its nervous, respiratory and digestive systems. We document all of this and in the process uncover what the house is.

Next, after we've learned who and what the house is, we ask the house who and what it wants to be. Every structure strives to be something and that something is inherent in its anatomy and personality. Does the house want to be an elegant French Chateau, a cute Cape Cod, a Prairie Farmhouse, or a Rambling Ranch? We also ask how what the house wants to be with how our client wants the house. Is there a fit or a conflict between the two? If a conflict, how do we alter the structure while accommodating both programs?

This approach is used for both style and massing as well as for spatial treatment. We abhor dyslexic interiors - ones where the added space is out of scale and character with the existing spaces. More often than not, this occurs when the addition is simply too large. We believe that it would have been better to make the addition smaller while keeping the detailing consistent throughout the house.



It takes more time and thought to achieve a well proportioned project but we think the added value is well worth it.

Rule 3: Correct Traffic Patterns

Houses constructed for the mass market were usually constructed at the lowest possible cost. Square footage would be tightly controlled to ensure "efficient" floor plans. Often the result of this is that the interior spaces became nothing more than wide hallways. The kitchen would be a hallway between the garage and living room. The living room would be a hallway between the bedrooms and the kitchen. To make matters worse, the living and dining room spaces in many ranch homes would be bisected along the diagonal—making the space almost totally useless. To overcome these flaws, we look to create dead end spaces and circular traffic patterns.

Dead end spaces, or spaces off the beaten path, are optimal for various home activities such as meal preparation and clean up, eating, television watching, sleeping, game playing, book reading, etc. To create these types of spaces, we look for opportunities to rationalize the traffic flow through the house. We create "halls" to connect activity areas. These halls are defined by light, views, ceiling heights and walls.

Another method of rationalizing traffic throughout the house and a method we regularly employ when working on ranch homes, is to create a circular traffic pattern to create activity "islands." These activity islands are defined by furniture grouping and generally occur around a strong and fixed focal point such as a fireplace.

Rationalizing traffic flow through the house has the benefit of creating spaces that can get messed up (with children's toys for example) while controlling where the mess occurs. A far better situation than when there's no limit to how far the mess can spread.



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Rule 4: Provide Light & View

Though the Chicagoland climate isn't the best for outdoor living, there's no reason that we can't open our houses to our yards and to the sun. To do so requires that we have an understanding of how our house is sited and how the sun moves across the house throughout the day and from season to season.

We all have a natural inclination to move toward the light. So we also want to ensure that movement through the house responds to and is reinforced by sunlight. When ascending a stairway, our efforts are rewarded when there's light and space that we move toward. Because our bedrooms are typically on the 2nd floor, a sunny aspect should greet us when descending a stair.

We also want to place windows and doors strategically so that there are view corridors that reinforce the spatial and functional organization of our house. These windows and doors provide us with a sense of the space beyond, making our house feel so much bigger than it may be. We also get to walk toward light, a more enjoyable experience for us.

Many of the houses in our area have been designed with little regard for their yards. In a home renovation project we look to expand the interior space to the yard through the use of windows. These windows give us the opportunity to gather sun and views into our homes as well as to monitor our children as they play outside.





