

How Small Is Small?

by Harry Jacobs, FAIA
Oakland, CA

|
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Developing a Small Project Niche

With the right focus and outlook, even a wrong number can turn into a success story. See page 2.

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How one architect initiated a valuable resource for networking and exchanging information in his local area. See page 3.

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While most folks seem to know intuitively what "small projects" are, few can offer a satisfactory definition. *The Architect's Handbook of Professional Practice* identifies many characteristics that define "small project."

The following is a paraphrased and greatly modified list of those characteristics. For an accurate iteration of the Handbook definition, please refer to its latest edition.

A. Cost: While representing a substantial outlay for the owner, the total cost is relatively low compared to the average cost of new buildings, yet the unit cost often is higher.

B. Scale: There is little repetition; therefore, there are no economies of scale.

C. Owner: Usually has a much greater personal (hence, emotional) stake in the project than is true for larger projects.

D. Contractor: The contractor frequently serves as foreman and/or carpenter on the job, often operating out of his or her home and pickup truck.

E. Subcontractors: Agreements between the general contractor and subcontractors often are informal and verbal. Mechanical and electrical systems are usually provided as design/build contracts.

F. Materials: Suppliers and manufacturers representatives may not consider the project large enough to devote much attention and advice.

G. Size: Small projects tend to be subject to much greater scrutiny per construction dollar than are large projects. Permissible variations in workmanship in large projects may be considered major defects in those that are smaller.

H. Consultants: Due to the size of the project, it is often difficult to find qualified "professional" consultants to provide advice.

I. Time: As many projects are started and completed in a relatively short time, payment schedules tend to be simplified, and alternate materials and products to those specified are often required due to lack of immediate availability.

J. Complexity: There are ordinarily as many specified items and subcontractors as required for much larger projects. Therefore, there are substantially fewer design, research, and specification dollars available for each item specified.



It is important to recognize that there does not exist a precise definition of the "small project" for the purposes of the Small Projects PIA. While some of the characteristics listed above may occur in large projects, "small projects" are those for which most of these characteristics are the rule, not the exception.

It is the collection of these characteristics that drives the successful small project practitioner to apply tactics different than those appropriate for larger projects.

The Small Projects PIA has been created in the recognition of this reality and to begin to fill the void of useful small project practice information and information-sharing venues.

Developing a Small Project Niche

by Rosemary McMonigal, AIA
Minneapolis, MN

As it happened, the company operator took the call. On the other end, a woman asked for Rosemary, but did not know which department or a last name. The operator began searching the 500 employees, remembered, told the caller, "Rosemary left over a year ago," and gave her my number.

The caller, it turned out, was looking for a different Rosemary.

But no matter. I met my misdirected caller for lunch a few times and somehow it turned out that her boss was looking for an architect. After two years, we have designed a prototype and five children's stores.

Prepare to take advantage of luck, and any caller is a potential client.

Actually, the children's stores were a continuation of one of our specialty areas, child care. The first building for children that we worked on was a Montessori school. The owner was striving to develop a project with a challenging site and budget. She would have spirited discussions with us about flexible space versus sound control, daylight in December versus sun shading in July, and other issues appropriate for 60 preschoolers in Minnesota. We completed two projects for her and were referred to two other clients.

A nurtured client is your best referral.

Three years later, we connected with an informational and referral agency for providers of child care. Together, we would assist companies considering start-up or expansion programs. Feasibility studies would present costs ranging from staff salaries and meal preparation to physical improvements. Almost always the answer was: "Looking at the whole picture, we can't afford that." These studies continue to be our busiest service.

Push strong projects forward and give honest caution to others.

Since that time, our work has ranged from consulting to full-service projects. One large corporation retained us as their advocate when the out-of-town architect designing their main office tower seemed less focused on the needs of their new center. Around the same time, we completed the state's first child-care center in the capitol complex area. A recent small project involved adding only a wall in an existing center.

Accept projects regardless of their size.

There isn't anything scientific about our approach to marketing in the child-care arena. When we realized how much we enjoyed shaping space for children and, possibly, their outlook on life, we decided to do more of this work.

Child care was also a natural outgrowth of our residential projects because clients felt we understood the homelike environment important to the children. We began speaking and writing articles about child care and became a part of the child-care community.

After setting a direction, we developed our niche, continuing our goal of quality work and service based on being responsive to our clients' needs.

Small Firm and Grateful

by *Gene Metz, AIA*
Alameda, CA

It seems little wonder that more than 66 percent of the country's architecture firms are of four people or fewer, according to the AIA Firm Survey. Firms of this size provide a particularly agreeable and challenging means of satisfying architectural needs in a positive and intimate way.

This was not so immediately obvious when I initially considered leaving a building program that involved many large projects and was managed by a large staff to reestablish a small, private practice.

Nine years as director of design and construction for the University of California at Berkeley satiated my desire for involvement with large, sophisticated buildings with building committees for clients. It was intriguing to be involved with research buildings for the biological sciences, chemical engineering, computer sciences, math sciences, and new library and business school buildings. New residential complexes and the restoration of the entire historic Kerr Campus were also interesting to work on.

There was a certain gratification in working with world-class educators and researchers on challenging buildings on a beautiful campus. The joy of teamwork was essential, but each person is a small cog in a very large wheel of endeavor.

A more direct and creative working relationship with owners,

clients, and user groups was the essential factor in my decision to practice in the small-firm format. Another factor was my desire to be involved and responsible for all facets of the design process. A writer's studio and residential projects have given me this opportunity. A small educational park, which includes the restoration of a significant historic structure, is another project that presently gives me great satisfaction.

Problem solving in an artful way is my approach to the design process. This requires a team approach with client, engineers, and contractors to achieve optimum results. Helping clients achieve their building needs and realize their aspirations within available resources is my major contribution. These are the circumstances I wanted most and those I am most pleased and fortunate to have achieved.

Use of the computer has made the achievement possible for me both by convincing me to try the small-firm approach and by being the tool with which to accomplish my goals. The computer, with a good CAD program linked to a database with spreadsheet capability, provides tools that can enhance the ability of a small firm to produce architecture.

Computer assistance can be effectively applied at the programming, conceptual design, design development, construction document, and construction administration phases, as well as in marketing. This is a benefit for any size firm, but the unique advantage to the small firm is obvious. I am not

yet fully accomplished in all of the above, but I have already benefitted in all phases. Furthermore, I believe my creativity has been enhanced in the process rather than diminished, as some seem to fear.

The advice I have followed through several career transitions is the same as I gave to my graduating students at Louisiana State University many years ago. To get the full taste of architecture, work in a variety of circumstances, large and small firms, and on a variety of project types. A small firm practice does not necessarily dictate small-scale projects, but it is a frequent consequence.

Architecture is a very individual profession, and the ideas expressed in this article may not be as appropriate to others as they are for me. But, as one half of a two-career couple, architectural practice has been flexible and adjusts well to transitions that frequently accompany arrangements such as mine. This recent transition has been most satisfactory.

The profession has served me well, and I am grateful.

Starting an SP Forum

by *Richard Morrison, AIA*
Menlo Park, CA

Six years ago, when I first started my one-person firm, I experienced the sudden isolation of the new sole practitioner. Coming from a very large firm, where the continu-

ous and daily contact with my colleagues was almost too much, I now missed the ability to bounce ideas off other architects and get a frequent reality check.

I also quickly realized that the type of projects I was now doing, mostly residential remodelings and additions, probably ought to be done very differently than the large, institutional projects I had been accustomed to. But where could I go to get information?

My local AIA chapter was the obvious place to start. Yet, surprisingly, while groups met regularly to discuss historic preservation, computers, codes, government relations, and a variety of other topics, there was really nothing to address the issues that were relevant to me. For example, what sort of contracts were my colleagues using for their small projects? What level of specifications were appropriate for these projects? How informal could (and should) the bid process be? How can a one-person firm effectively handle billing and accounting for a multitude of concurrent projects?

I had never been very active in the AIA, but clearly, if I wanted to get any information, I was going to have to initiate things myself. Fortunately, the Oakland Chapter was receptive to the idea of starting a committee geared to the needs of those who had practices based on small projects.

I then sent off a form letter to a list compiled from attendees of a previous Oakland Chapter workshop on "Construction Documents for a Small Job." The letter was an invitation to the kickoff meeting

for the "Remodelers' Roundtable," a monthly brown-bag lunch meeting intended to give professionals an opportunity to share information with one another. Rather than a guest speaker lecture.)

From that first meeting in 1988, the Remodelers' Roundtable has taken on a life of its own. It has obviously addressed a need felt by many in the chapter. A recent survey indicated that it was the best-attended committee in the chapter.

What has been most rewarding is the level of generosity and openness expressed by the participants. For example, we've had document exchanges where, in return for donating a current, blank client agreement form, master specifications, and bid forms, the donor would receive copies of all the others donated into the pool. (The rule, "no donation, no copies," is strictly enforced.)

We've had wonderful monthly discussions running the gamut from "Working with Interior Designers," "Time-Saving Tips and Tricks," "Programming a Small Project," and "Details That Got Us Into Trouble," to "Getting Paid on Time," "How We Manage When There's Too Much to Do," and "Does CADD Make Sense for a Small Project?" Often, contractors, or people from other related professions, will show up and add another dose of reality.

Usually the conversation takes a few interesting tangents, and invariably one leaves the meeting with a few priceless gems of information: names of some great

contractors, a new supplier, a detail that didn't work for someone, the name of a software program that was just what you needed, or, maybe most important, the sense that you're doing things right.

Also, most of the others believe, as do I, that the networking aspect of these meetings is just as valuable. I now feel fortunate to be able to call a number of my colleagues to ask a question, find the names of good landscape designers, or, when I'm overloaded, refer a project responsibly.

What does it take to start and run such a forum? Other than the meeting itself, maybe an hour or so a month. I write up a little blurb about the upcoming meeting topic and photocopy it onto postage-paid postcards. Adding computer-generated mailing labels takes only a few minutes. (We currently have about 80 on our mailing list; usually about 20-25 attendees per meeting.)

Although everyone knows that the meeting is regularly on the first Thursday of the month, the reminder postcards help to ensure a good turnout. (We collect \$1 from everyone at each meeting to cover the cost of the mailings.)

Some gentle facilitation at the meetings is occasionally needed. A question or two will keep the discussion from getting too bogged down by anyone's personal agenda and will stimulate ideas if the discussion starts floundering.

If you don't currently have such a forum, I strongly encourage you to start one. For me, it's been one activity that has made my membership in the AIA pay for itself many times over.

Small Projects: Rewarding Practice

by *Laurie Maurer, FALA*
Brooklyn, NY

Like most architects, my husband, Stanley, and I started our practice expecting to be given the same kind of large and prestigious commissions we had worked on during our internship years—Stanley at I.M. Pei and Edward Larrabee Barnes, and I at Philip Johnson and Marcel Breuer.

We were absolutely committed to the things we had learned in those offices: Being an architect meant really doing the architecture, studying all projects down to the smallest detail, providing complete architectural services for all projects, and being paid for our time.

Although most of the projects were small, early on we naturally developed a logical design process identical to what we had used on larger projects in other offices. Since we both love to draw, from the very beginning almost all the decisions on a project were made by us, even though our office had room for four assistants. Our reputation grew as good designers and, probably even more importantly, as responsible and thorough (but very expensive!) architects.

It also became evident to us that an approach such as ours was not for all clients. Many did not care about quality design and construction. Many did not see the cost/benefit ratio for expenditures

relating to design. Many saw architects only as necessary evils to fulfill legal requirements.

Over the years, we have turned down many more projects than we have taken on, believing that architects have only one chance at making (and keeping) a reputation for excellence. No matter what the size of the project, we have taken on only those that were design problems, and we have only worked for clients who understood that the design process takes time and generates larger architectural fees.

Our practice has evolved over the last 24 years into one that deals primarily with end-users, those who can make the choice for quality and are willing to pay for it. Almost by definition, therefore, we have largely focused on high-end residential projects. Other office and small institutional projects come to us for similar reasons.

There is a great deal of satisfaction in working closely with intelligent clients who want what you have to offer and being able to solve their problems with absolutely no compromise to aesthetic standards. There is equal satisfaction in knowing that a practice can be built on recommendations only, and all your time can be spent solving architectural problems instead of trying to generate more work to keep your staff productive.

After many discussions with colleagues in the profession, we also discovered that a larger office size, or larger projects, doesn't necessarily mean more net income, but does often mean more liability and debt.

Two of our acquaintances, both

very well known New York architects and longtime admirers of our work, have told us that they want to have our kind of practice when they retire. That sort of says it all.

Small Projects Member Directory

One of the most important aspects of PIA membership is the opportunity to network with your peers. PIA involvement provides you with access to the expertise, knowledge, and experiences of many professionals who have similar backgrounds, projects, and/or architectural practices.

The Small Projects PIA Member Directory is one resource that offers you the opportunity to expand your contacts and to hook up with small projects practitioners both in your local area and throughout the country.

To be published in the spring, this directory will list all members of the Small Projects PIA and include each member's address and phone number. All members of the Small Projects PIA will be mailed a copy.

Happy Networking!

If you have any questions concerning the Small Projects PIA Member Directory, contact Candace Kerman at (202) 626-7311.

Tips and

Accurate Note Taking: Take Note of This!

Successful management of numerous small projects requires accurate note taking. The smallest deviation from the agreed-upon program will shine out from the drawings and shatter the client's confidence in your efficiency and your effective management of the project.

Your draftperson may think that two squares in a rectangle is a suitable representation for a kitchen sink, but the client who told you at your first meeting that she preferred a large, single-bowl sink will be disappointed, and perhaps angry, that it has to be mentioned again.

Take meticulous notes during phone calls as well as meetings. Reread them, make sure your staff reads them, and, before presentation, check drawings against the notes. Never force the client to repeat a request. *by Bennett Christopherson, AIA, Berkeley, CA*

Small Sheet Size

Consider using 11" x 17" size drawing sheets, with 1/8" scale plans if necessary. Although you'll have a few more pages, the drawings can then be easily reproduced on a photocopier. The specifications can be photocopied onto the backs of the drawings, making a complete drawing set that the contractor can fold and put into a back pocket while working. Your client will save money on reproduction expenses.

For competitive bidding, you can provide one set for each contractor and let them make as many sets as they need, eliminating the reproduction headache for yourself.

Another benefit is that you can work with pads of 11" x 17" gridded vellum, eliminating the need for lettering guidelines. Drawings stay far cleaner, too!

by Richard Morrison, AIA, Menlo Park, CA

Home Improvement Reducing Tension

As we all know, few processes disrupt a family's lifestyle more than the renovation of their home. Positive expectations are diminished by strangers who leave damp toilet seats and owners who serve as the contractor's answering service. Normal construction discomfort can turn to flaring tempers and irrational behavior.

Twenty years of doing home renovations and additions have persuaded me that requiring portable toilets and a dedicated construction telephone line is worth the extra cost, even for the smallest project. Initially skeptical contractors like them too because they experience the reduced tension, and most of all they don't have to serve as the owner's answering machine. I require them for all projects.

by Harry Jacobs, FALA, Oakland, CA

Easing Into B141

Although no standard contract form can be ideally suited to all situations, my experience has been that AIA B141 comes close enough and has the benefit of being widely known and accepted. The problem is that for clients on small projects (which in our case are almost always residential), the language can be fairly intimidating and often counterproductive to establishment of the close personal relationships we try to build.

To solve this problem and still ultimately have the clarity and detail that the B141 provides, we start small projects with a simple, "conversational" letter agreement and enclose a copy of B141 as an example of the form of agreement we anticipate entering into once a design direction has been agreed upon.

Essential aspects of our relationship are discussed in

Techniques

our initial meetings, but detailed review of the formal agreement takes place later within the context of an established working relationship. Compensation is also structured to fit this arrangement, usually on an hourly basis for initial design with a fixed fee established once the design has been agreed upon. We have been using this approach now for some 20 years and find it usually works quite satisfactorily.

by Robert T. Simpson, FALA, Berkeley, CA

An Architect's Field Bag

On construction site visits, I had trouble slithering between studs with my large shoulder briefcase, so I often left my bulky camera and other necessities behind at the office. To cure this problem, I gathered my field-visit paraphernalia, went to a leather shop, and tried out several bags. Through process of elimination and tight packing, I settled on a 9" x 6" x 4" shoulder bag with two compartments and two pockets that I now carry with me almost all the time.

My field bag contains a compact camera with "date-back," extra roll of film, 12' tape measure, Swiss army knife, small flashlight, 6" scale, business cards, 3" x 5" note pad, small calendar, various colored pens and pencils, permanent marking pen, telephone list, quarters for pay phones and parking meters, office checkbook, calculator, premoistened towelettes, and a small mirror (for checking tops and bottoms of doors, of course).

This shoulder bag leaves my hands free to take notes while I walk around the job site with the contractor and owner, and the tools I need are right at my elbow. I'm also able to measure or take snapshots of items and details that intrigue me as I travel around town.

by Catherine Roha, AIA, Berkeley, CA

Shed Dormer Trusses

When I see a shed dormer roof, I expect that I am looking at an example of old-fashioned stick framing. Stick framing is still commonly used in remodel work in my area. For a recent second-story addition, which I designed with a series of shed dormers, my client asked that we use trusses for the roof in the interest of cost savings. We did this by using two different truss profiles immediately adjacent to each other where each change in roof plane occurred. Despite the purchase of two additional trusses for each shed dormer, I believe the overall cost was lower than stick framing would have been. It took two days to lay out the trusses and would have taken only one if the roof area had been accessible by crane. I estimate stick framing the roof would have taken three to four days.

by Donald Wardlaw, AIA, Oakland, CA

Contributors Needed

Consistent with the belief that our greatest value to one another lies in the sharing of information, the PIA newsletter is seeking contributions of articles of interest to small project architects, individual small project architect profiles, and tips on small project practice.

We will publish a selection of these in each newsletter. The remaining articles, tips, and profiles will be published periodically as a collection entitled, "Notes From the Field." The first volume is scheduled for publication in August.

Let's hear from you. Please send your ideas, tips, and articles on a 5 1/4" or 3 1/2" disk to: Small Projects PLA, Candace M. Kerman, The American Institute of Architects, 1735 New York Avenue, NW, Washington, DC 20006-5292. Articles can also be sent to Candace via E-Mail on AIAOnline.

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PIA Event Calendar

The Small Projects PIA is holding several events at the AIA National Convention in Los Angeles, May 1994. These events offer small project practitioners an ideal opportunity to gain new knowledge and skills, while networking with one's peers. The following is an overview of Small Projects convention activities.

Small Projects Agreements, May 14 (Seminar #S28) to be moderated by Harry M. Jacobs, FAIA, will explore the new set of documents crafted by AIA specifically for small projects practitioners — A105 (Owner/Architect), B155 (Owner/Contractor), and A205 (General Conditions) — and focuses on alternative AIA agreements useful for small projects, including

letter agreements. Consultations on Small Projects Agreements will also be held on May 15 (#C40a & #C40b).

MasterSpec for Small Projects, May 13 (#C18a), May 14 (#C18b), & May 15 (#C18c), will involve consultations, led by Mark Kalin, AIA, which provide a forum for the exchange of information and ideas in relation to MasterSpec for small projects.

Brochures for Small Project Practitioners—Small Projects PIA Reception, May 14, will provide Small Projects PIA members an informal setting for meeting other small project practitioners, while, at the same time, receiving new marketing ideas through the exchange of brochures, marketing letters, resumes, and other promotional materials. A marketing specialist will be on-hand to evaluate marketing materials.

For more information on these convention activities, call Candace Kerman at (202) 626-7311.

Publications

These AIA publications provide relevant information to small projects practitioners. To order, please call 800-365-ARCH. Prices listed are for AIA members. Nonmember prices are slightly higher.

Current Practices in Small Firm Management: An Architect's Notebook

by James R. Franklin, FAIA
Based on his Optimizing the Small Firm workshops (190 pages; Order #R942) \$50.00

How to Start Your Own Firm Kit

James R. Franklin, FAIA
This "kit" version addresses issues vital to setting up a firm and includes the complete text of *Current Practices in Small Firm Management*. (230 pages; Order #R942-CS) \$65.00