Small Project Forum

Report

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AIA

Client Relations

Rachel Simmons Schade, AIA
Philadelphia

Have you ever had a client you really wanted to walk away from? I have had a few and am still trying to figure out what is the best way to get out of a project with them. Sometimes it seems as though it would be so much easier if they would pull the plug. But what happens when they don't and you have to hang in there? Here are a few things I've learned over the years.

Don't take it personally, even if your client is a friend. Since you probably should not have been in a business relationship with a friend (or worse, family) in the first place, try to make the situation as professional as possible for all involved. Record meetings with minutes. Invoice them for *all* hours spent on the project.

Compromise, but don't proceed with something you know to be poor practice, regardless of your clients desires. Explain to them all the implications of their decisions and disassociate yourself with anything that puts you into a situation that is undesirable or exposes you to unreasonable liability.

If your clients are openly or passively aggressive, they still need the comfort of knowing that you are in control of issues within your professional expertise. You can't meet aggression with aggression, but you can meet it with calm professionalism.

Listen first. Most clients want to be in control and want to feel as though you are implementing their ideas. Even though I usually consider what is eventually built to be mine, a client will feel much more ownership in a project if they feel you've listened and heard them. Get through it as peacefully as possible. Your reputation is one of your most important assets.

Communication Is Key for Us

Heather McKinney, AIA
Austin

Communication can't be emphasized enough on small projects, particularly residential work. Residential work is, by its nature, very personal and emotional. Clients may be a little more anxious since the project often represents significant investment, complex choices/compromises, and upheaval. The better they understand the process, timetable, and ramifications of their decisions, the more likely they will keep their equilibrium and good humor.

Surprise is not good as a general rule.

Clients often select their architects not, as we sometimes hope, due to our elegant design work, but because they feel we have listened well to them and can communicate clearly and guide them through the process with care and understanding. We try to prepare our clients initially for what can be an alien, exciting, and grueling experience. In the first interview, we outline our process, a rough timetable, and a rough fee estimate for the work as it has been explained to us. We discuss examples of other, relevant jobs to demonstrate the range of how the work might be accomplished. We try to get the clients to divulge at least one of the three important parameters to the project: timetable, budget, and scope/quality. We explain all aspects of our services, again using examples from past projects to illustrate.

For example, when discussing site observation, we use the example of the owner who said, "Why should I pay you to come out to the jobsite to correct your own mistakes?" Many clients probably wonder the same thing and are too polite to ask it. When we explain the multiple aspects of site observation, including the opportunity to head off errors by the contractor, the owner, and, yes, the architect before they become expensive corrections, most owners are relieved.

In our follow-up proposal letter, we reiterate the principal points discussed in the interview. We emphasize that the process is fluid and sometimes unpredictable, a notion again alien to many people who have tight control over their lives or their jobs. Everything is not going to go according to plan, and if you can encourage your clients to be flexible in their expectations, they are again more likely to weather the storm in better spirits. We even tell our clients that there is a rhythm to every project, a time when they will be thrilled and a time when they will be dog-tired and disheartened ... all the basic advice I suppose that potential parents get on the experience of pregnancy.

Again, during the design and construction, we try to maintain both informal and formal communications with our clients. We have found that scheduled site visits/project meetings give everyone a chance to stay abreast of the progress and predict the upcoming decisions. Periodic phone calls to the clients to update them also help. This hand-holding and attention to detail is what garners the client's appreciation and future recommendations.

Terminating a Client Relationship

Ty Morrison, AIA
Central Section—AIA Idaho

Recently we were approached by a client, who was the brother of one of our employees, to assist in a rezoning request. The client had begun the rezoning process himself and came to us when the planning and zoning commission had recommended denial to the city council. We established an hourly not-to-exceed limited contract and began the process of reversing the denial and achieving a successful rezoning of the client's property.

Our client had been very cooperative in negotiating the constantly fluctuating scope of work and payment for services rendered. Now the time had come for completion of the design and preparation of design-review-district documents and construction documents for building permits and an invitation to bid. Our client, at our agreement, requested a lump-sum fee proposal, using his brother (our employee) as a drafting service to prepare the documents.

When the client received the fee proposal, he immediately called, challenging our good will and the competitive nature of our fee. We responded in earnest with an evaluation of the proposal and our past performance, but were unwilling to reduce our fee. The client hung up in anger, not responding with acceptance or rejection of our proposal. We were uncertain how he would proceed, but we were becoming certain that reaching an agreement would lead to great difficulty in managing the project.

The client called about a week later with a proposition; meet the fee as proposed by two competing architects or lose the job. We respectfully declined, citing our knowledge of his project and our past performance with similar clients was worthy of value. He became irate and stated that we were doing him a disservice, and the only reasonable solution was for us to cut our fee. If we did not, then he would take the project elsewhere and encourage his brother to leave our employ. We declined. In the weeks that followed, overtures were made to negotiate a compromise fee, and all would be well. We repeated that a contractual relationship was not desirable, given the past dealings and attitude of our client. Life was too short to work at modest fees for a client who did not appreciate our approach to service.

We stood our ground and refused to bid our services, explaining that we were no longer interested in dealing with a client who did not respect our professionalism. There have been no regrets. We have learned that the architect who did take the project was fired several times. The permits were delayed by many resubmittals to the building department, often because of the client's uncooperative nature.

This article is excerpted from Managing Project Risk *(1995), a publication of the AIA Risk Managment Committee. Mr. Laping wrote this from the perspective of a large-firm practitioner; we believe it has relevance to small project practices.*

Evaluating a Client

John M. Laping, FAIA
West Amherst, N.Y.

When I was a young principal in the firm, we were approached to design a small clinic for an opthamologist. Her husband took an active role in negotiating the contract and at our last session, began a series of "what if" questions. I began answering by saying we would investigate the problem, design the fix, and issue a change order if appropriate. That was not good enough, and he kept pressing until I finally responded, "Well, you could always sue me!"

When I heard myself say that, I realized that we were not ever going to be able to work out any problems and politely told him to find another architect. Sometimes you're ahead of the game when you do not get the job.

Evaluating a potential client is a critical part of assessing a project's probability for success. Good clients are essential to good architecture and to the ultimate success of the firm. Bad clients - and I would describe a bad client as one who is forever second guessing the architect - will bring heartache to the design and heartburn to the practice. After you have decided that you want to go after a project because you and your team have the knowledge and skills required to execute a good project, take a hard look at the potential client. Some sense of who you are dealing with will serve you well when you prepare your RFQ materials, your interview presentation, and - assuming success - your contract negotiation.

I like to ask, "Is this a client I can live with for months or years?" There certainly needs to be a high level of mutual respect. I need to believe I will receive respect for the quality of the design I bring to the table, the quality of the documents my office and consultants develop, and our ability to bring the project to fruition. I need to respect my client's opinions and desires, understand his or her aspirations for the project, and develop these into brick and mortar.

Some clients are particularly demanding, and as long as you know that up front, that can be okay. You need to negotiate a fair fee that complements the additional time it will take to satisfy those demands, which may take the form of additional services, public approval processes, multiple presentations, design alternatives, budget constraints, unclear program information, etc. As long as you are treated fairly and equitably, a demanding client can keep the adrenaline level high and can produce a good project.

Keep in mind, too, that many clients have their own in-house contract for building projects and these may not parallel the B-141. Industries and utilities may give you a purchase order, and government agencies will give you their form of contract and perhaps a handbook or two on working with their agency. There are no hard and fast rules here, but the more you know about your client's expectations, the better off you both will be.

You also need to determine just who you will be working with. Is it 25 church trustees or the pastor; is it the school board or the superintendent; is it the hospital board, its administrators, or the medical staff? You certainly need a strategy to bring all the parties along, and you need to recognize that their interests may vary. The hospital board may be most interested in project funding, administration in market share and attracting staff, and the medical staff in functional arrangement.

Some clients are real plums who afford their architects creative latitude, adequate budgets, and a vision of what the project is all about. Others are concerned with only the bottom line – a cheap building produced for the lowest possible fee. It is not unreasonable, then, to take some time to visit some of the potential clients' buildings and gauge the design, construction quality, and level of maintenance. You may want to speak with architects and contractors who have worked for that client. Find out if there was a successful relationship. Also, give some thought to history. From what you have read in the local press, has the client actually built the projects identified with his or her company, or does the client flirt with dreams?

Many years ago, I made a presentation to an urban landowner on behalf of a church-sponsored hospice project. The landowner was not persuaded to donate the parcel because it was not, in his view, the highest and best use for the property. Instead, he asked us to provide drawings for several large cooperative apartment buildings for his relatively small site on a speculative basis. For years he tried to push the concept, but had no takers. After his death, his highest and best use dream became parking lots; our free sketches are archived.

Some clients only build once in a generation. They have no history, so it is tougher to check them out. You may begin to gauge them by the questions they ask you. More importantly, it is okay to interview them, too. How did you come to their attention? Do they have a program, site, and budget? What's the project schedule? Who will manage the project and (ask tactfully) what are his or her qualifications and to whom does he or she report? Generally, once-in-a-lifetime clients have advisers of some kind – who could be contractors, developers, lawyers, or someone who has recently constructed another project –and they all have war stories they have shared. These stories will probably come out during the interview or negotiation and may color the client's thinking in contract terms, design decisions, budgeting, and change orders. You need to deal with them immediately, tactfully, and in a business-like manner so that your client knows what to expect from you. Finally, you absolutely need to know if there is funding in place with at least enough liquidity to pay for architectural services.

Cash flow is the lifeblood of any architectural practice, and a potential client needs to understand this. Few offices can afford to carry a client. If your client cannot or will not give you assurance that funding is in place, you may need to ask for a retainer. The B-141 contains the appropriate language. You or your banker could also get a Dun and Bradstreet credit report. Another technique useful in opening up discussions is to develop a cash flow analysis. You know the schedule and the associated fee for the project so you can give your potential client an

(continued on page 15 column 3)

Mollica Residence, Oakland, Calif., William Dutcher, FAIA, architect

Clients According To Dutcher

Donald Wardlaw, AIA
Oakland

The work of William (Bill) Dutcher, FAIA is much admired by the architects in my area. We see his work firsthand, others may have seen it in *Fine HomeBuilding*, *Architecture*, and *Sunset* magazines. Dutcher also has a rude habit of collecting design awards that others want.

There are small firms that do more work. There are small firms that occasionally do a project that stands above the rest. With Dutcher there are times when work is plentiful and times when it is not. If there's too little it is not because the quality of his work or the caliber of referrals has declined. I think what the architects notice is that his work is consistently of high quality. I fear fame awaits his passing.

In the 1950s William Wurster hired Charles Eames to redesign the architecture curriculum at UC Berkeley. It was thus transformed from a Beaux Arts program to a Bauhaus-inspired program. A graduate of UC Berkeley in 1959, Dutcher sees himself as a modern architect, one who lets style evolve from the resolution of the particulars of a design problem. And, as it happens, the particulars are always the needs of his clients.

Le Corbusier said, "there are no great buildings, only great clients." Considering Dutcher's work, I thought he must know something about clients. I decided to take him out for a moderately expensive lunch of miniscule portions and explore the topic with him.

First I wanted to know how he gets all these great clients. That's why his work is so much better, right? He must really screen his clients carefully, tossing most off to other architects willing to grovel for work. "I take anything that walks in the door," says Dutcher. That typically would be someone who has already heard good things. Clients screen Dutcher.

"I learned from Gerald McCue [an early employer] a sense of professionalism that was in the service to a client, and not in service to the architect's ego. Mostly, there are no bad clients or bad projects."

So interesting and varied designs are inspired by his clients? "I work to understand what a client is after. I listen. The design is generated from the needs of my clients. I push my own direction if they are amenable. Ultimately the designs are very personal, they derive from my clients attitudes toward life, how they want to live, and in the case of couples, how they feel about and relate to each other."

I wondered whether his clients were ever concerned about the investment quality of their homes, about preserving or enhancing its marketability, perhaps at the expense of accepting unusual solutions. "I always encourage my clients to design it for themselves. If the house is atypical it will appeal to a smaller market, but a house designed by an architect, designed with care, will have a marketable and appealing character—and it will sell for a higher price."

Is trust important? "Yes, clients are like babes in the woods, easily led down the wrong path. I present multiple schemes for their consideration. We work through the options and study the tradeoffs and opportunities together. Their involvement is a form of investment in the solutions that are accepted. I work hard to gain their trust."

Do project economics complicate the relationship? "Yes, every project has been a budget problem. Every project pushes the limits of the budget. It could be a $1.2 million house and it will still be at the limit. I recently attended a lecture by Will Bruder who said 'It's not surprising for architects' designs to be over budget since the architect is always striving to achieve the most that is possible for the client.' I don't consider myself capable of accurate cost estimates. The most workable means of controlling costs I've found is to involve the prospective builder in the design process to provide cost estimates and advice from early stages of project development. I have not had good results with professional estimators."

And what characterizes the best clients, or the better projects? "The best clients are involved and critical. They are intelligent, reaching for something and not satisfied with the mediocre or offhand response. In the best work, we form a relationship that continues after the work is done. We have gained a measure of mutual respect."

Gee, I Would Never Let That Happen to Me

Chris Chu, AIA
Boston

When I first started on my own I thought that a lot of the pitfalls that I had seen while working in other firms would definitely not happen to me. After all, I knew what they were. Well, I guess there is a reason some things do happen anyway.

Client relations, I thought, would be easy for me. People generally find me likable, easy to get along with and work with. That is not enough however. I am learning through mistakes that it takes an active effort to create good client relations and maintain them even after the job is finished (or canceled or postponed).

A hard lesson I learned recently was the very important one of choosing your client and project well (and a couple of other lessons too). I had responded to a young couple (the husband was a lawyer) who had never worked with an architect and who were purchasing a condo for the first time. They were nervous. I impressed upon them that they needed an architect. Well, the good news was that they wanted to use me. The bad news was that they wanted to spend only up to eight hours of my time. In my effort to help them keep costs down I told them that they could do the measuring themselves. That was a mistake. And because it was a small project and they were in a hurry, I did not have them sign a contract. Another mistake. Well, I'll spare you the details but despite an initial good working relationship, it went downhill rapidly, ending on a sour note with me not getting paid and, worse, having them think ill of me and my work. Having a litigious, nervous client who was quick to jump to conclusions and shut off communications took me for a loop.

Sometimes being a responsive, competent architect is not enough.

Positive Client Relations—At What Cost?

Cynthia K. Pozolo, AIA
Detroit

Call it by any of several names—marketing, promotion, professional development—but the cultivation of clients beyond project delivery is a critical aspect of building positive client relations.

But it can also be an expensive aspect of building positive client relations.

While most of us would agree that a casual lunch, dinner, or social event seems pretty harmless, the extensive use of vendor gratuities can lead to a cycle that is difficult to break. How can your firm address this concern and implement guidelines that reinforce ethical limits in client development?

First develop a mindset that says it's okay to set limits and break away from the way "it's always been done" in the industry. Though networking usually has some sort of expense associated with it, you can define the rules by setting a dollar limit on what your employees can accept from others. By passing up meals, tickets, or other items that exceed a certain value, you have identified what your firm believes are reasonable limits for both the give and take of gratuities.

Also, develop systems such as monthly phone calls or quarterly newsletters as a means of maintaining regular, but less expensive contacts. These regular contacts often provide paybacks (projects, that is) more than can be gained by a pricey, crowded holiday celebration that occurs during an over-scheduled, stressful time for both your employees and your clients.

Lastly, become familiar with limits your clients might have set for their employees, and use that as a basis for determining your client development procedures. A recent Detroit phenomenon is the impact of a major corporation's zero-tolerance policy regarding vendor gratuities. Though many vendors and employees feel the slogan, "If you didn't bring the donuts to the meeting, don't eat them!" is unrealistic and unnecessary, the impact is real. As noted in a local weekly business magazine, at least one restaurant in close proximity to that company's technical development center has filed for Chapter 11 reorganization, based primarily on the shift away from business lunches.

For the small-firm owner, the results might not be as drastic, nor the limits quite as rigidly defined, but they are worth consideration. Since one benefit of small projects and small firms is close client contact, that contact can be used to your advantage by building an ongoing, honest relationship—even with financial limits in place.

Your best client relationships need not be your most expensive.

Should I Take This Commission or Shove It?

Hy Applebaum
Houston

Over the last 30 years of dealing with a variety of client types, I have developed an inner sense in evaluating people. I am now a fairly good judge of character, I am told; well, most of the time.

I created a simple vehicle (after being burned a few times) to assist me in deciding whether to accept or decline a commission. This vehicle has 14 well-balanced wheels. It isn't the end of the world if some go flat, but after I take the ride, bumpy or smooth, I have a clear understanding of the merits, risks, and my needs in relation to any commission.

Question 1.
DOES THIS PROJECT SEEM INTERESTING OR CHALLENGING?

Being a generalist in my practice, I have done a variety of building types. You might call me a hands-on architect, as I usually would have taken on anything I could get my hands on. I have found that not all projects are equal and some can be prime choice. Many are fairly standard or a run-of-the-mill type. However, every so often, one comes along that has more interesting or challenging opportunities. There have been occasions after a project is completed that I wanted to kick myself for not recognizing what I should have accomplished had I paid attention and understood what the client was asking of me. So now I'll say to myself, "Mr. Architect, look hard, isn't this project the challenging or interesting one?" This is the time to identify the merits and potential of a proposed commission.

Question 2.
DO I HAVE ANY PAST EXPERIENCE TO FACILITATE THIS COMMISSION, OR WILL IT REQUIRE ME TO SPEND TIME IN RESEARCH?

Very few clients are willing to pay for my research time. When I am in unfamiliar waters I try to add to the fee to be allocated if possible toward research. Usually I have to eat this time. Am I willing to do that? When I become knowledgeable in this building type, will I have an opportunity to find other projects of a similar nature? If, on the other hand, I have the experience, am I expected to do it as before, or can I be creative. Will the client allow me this latitude?

Question 3.
DO I LIKE THE CLIENT?

I have been fortunate to become good friends with many of my clients after their projects were completed. Most have become very close and a few have not. It's reasonable to say that my most creative work is usually for clients I like. This is especially true for residential work. The relationship challenges me because I want to know the client better, and there is a strong desire to do as outstanding a job as I can. I try not to take a commission if I feel a personality clash will develop. I believe an architect is like a puppeteer pulling all the strings to control client, consultants, and contractor. A sympathetic client will allow you to control them and are more forgiving when you err. Clients you like and who like you usually are good sources for referrals and networking.

Question 4.
IS THE FEE PRACTICAL?

The general public has no understanding of the responsibilities or work of an architecture office. Being in the computer age, they think that all it takes is a push of a few buttons to get designs and drawings. It is very critical that the extent of services be discussed and determined to develop a proper fee. My fee structure is not rigid and often I may charge what I feel the job is worth to the client the first time, if I feel the effort will lead to additional work. If the client has a predetermined fee for the work, can the work be structured to match the fee, and will the client accept a lesser service?

Question 5.
IS THE FEE PROFITABLE?

It's great to be innovative when you have the opportunity. The reality of life is that you must be profitable if you expect to continue practicing your art. *THERE IS NO OTHER CHOICE.* If the client is knowledgeable of services to be performed, a profit should be obtainable. If the fee is tight, do I know how to make it profitable?

Question 6.
WILL I HAVE A FULL-SERVICE CONTRACT?

Often I find potential clients unwilling to contract for construction administration even when I think the job warrants it. Should I accept the work without this phase? I usually have the contract spell out construction administration as an additional service on an hourly charge. I'm usually needed on occasion to review details and resolve issues not covered by the drawings. Checking shop drawings is always included in my basic services with or without construction administration.

Question 7.
ARE THERE LIABILITY RISKS IF I CANNOT GET A FULL-SERVICE CONTRACT?

This is another very critical issue because if I think a client is litigious and difficult, I certainly don't want to put myself in a position of potential exposure. Unfortunately, small firms usually have to take greater risks in their business practices. I try to exclude or limit my exposure in my contract. This is applicable for full-service contracts as well.

Question 8.
WILL THIS COMMISSION LEAD TO OTHER WORK?

I may choose to accept a proposed commission if I recognize the potential for repeat work. Other considerations are the exposure to other possible potential clients or whether the client is a good networking source.

Question 9.
DOES THE COMMISSION FIT MY TIME FRAME OR WILL I BE OVERBOOKED?

It always appears when you are the busiest everybody is looking to you for services. The new job is challenging, the fee is good, the client is extremely cooperative and I am too busy. Can I handle this potential commission if I hire someone to assist me? Will the work require a great deal of my time to develop a concept? I have been fortunate to have two architects I can use under contract to assist me. I usually will have them help me complete what I am presently doing, so I can start preliminary schemes on the new work. And, yes, it does require 18-hour-plus days initially. Is the potential commission worth it?

Question 10.
IS THE BUDGET REALISTIC?

I know I'm the only architect who gets potential clients who think they know how to build cheaper and better then the norm. I always ask the client if there is a budget. Often I have to determine the cost of the construction and then fit it to their budget. My practice is to start with a very rough sketch and ask the assistance of a general contractor to determine the feasibility of the budget. With this information, I can modify my design before I get too involved. With proper adjustments I can achieve the client's goals. In residential work in particular, the client has a tendency to nickel and dime a project out of its budget. How can I slap their wrists and say "no no" and still achieve their stated objectives?

Question 11.
DO I REALLY WANT THIS COMMISSION?

This is the time of soul searching. Having explored all the questions before this one, I have to ask myself, why do I want this commission? Is it for the potential profit, or is it an ego trip? What will I gain and what will I lose?

Question 12.
DO I NEED THE COMMISSION TO KEEP ME BUSY AND/OR DO I NEED THE CASH FLOW?

There always comes a time when it is difficult to turn down work even if I don't want it. If I run into this situation, I do whatever I can in my contract to cover my derriere in the areas I think there could be difficulty.

Question 13.
WILL THE POTENTIAL CLIENT PAY AN INITIAL FEE PER THE AIA CONTRACT?

This is a very important qualification to me. In most cases this is exactly how they do business. If I can't get an initial fee to start the work, I question the reliability of the potential client and the relationship we will have. I have had clients who paid an initial fee and had difficulty collecting the remainder. It's still a guessing game, and I'm trying to lower the odds by this evaluation of a commission.

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TIPS AND TECHNIQUES

Avoiding No-Win Clients

Laura Montllor, AIA
Long Island

In eight years of residential renovation practice, I have had many wonderful clients. They are very appreciative of the architects' effort and art. As a result, their projects have been exceptional. These clients have been a constant source of referrals for more work.

Alas, not all clients are like this. To weed out no-win clients quickly, I listen for the following.

#1. Two revealing key words are "*just*" and "*only,*" as in; "We *just* want a simple room. It should *only* take a few weeks." This person is highly unrealistic about time and budget. Avoid this one!

#2. Tip-off line: *"I always wanted to be an architect."*

Some people only want to pay an architect so that they can show that they are smarter than the architect. This client will question every detail *ad infinitum*. If you cannot establish a basis of professional respect at the first meeting, beware!

#3. Constant mention of (imaginary) referrals, such as:

"I know three of my neighbors will love to meet you." They will haggle about a few dollars of your fee and expect a special deal. Don't give it. State simply that these are our standard fees and offer to reduce the scope of services.

It is much wiser to turn away no-win clients. Through experience I have found that they will sabotage the process and run you ragged.

One Way to Make Sure You're Paid

Hy Applebaum, AIA
Houston

It has been said that the only thing worse than not getting a commission is getting the wrong commission. I experienced this situation about three years ago.

In dealing with a client on a restaurant remodeling job, I found it difficult to collect my monthly fees. It was at a point where more than half of my fee was unpaid and my client was ready to award the contract. I began to have doubts if I would ever collect without legal action. How this idea came into my head, I really don't know, but I decided to invest $1,600 and pay for the building permit in my name. When the contractor wanted to get his building permit, he discovered that the permit had already been issued. I wouldn't release the permit until I was paid in full.

The contractor paid my fee and the permit cost at the pleading of the client with the understanding he would be reimbursed in the construction draws. Ultimately, I had to appear for a deposition in the contractor's behalf.

The Client Is Ready to Start—Are You?

Rosemary McMonigal, AIA
Minneapolis

When a project starts, we have already worked with the client to establish a process for the project. Although everybody is eager to start work immediately, we are careful first to:

- Meet with the client to discuss the project and show them examples of our past projects and the process that we follow
- Prepare a written scope of work
- Identify the phases of services that will be provided
- Establish fees and methods of payment
- Estimate a ballpark construction cost
- Assist with a total project cost outline
- Provide a list of references for the client to contact
- Draft a schedule from start of work through construction completion
- Introduce the client to the staff who will be working on their project
- Receive an initial payment and signed agreement for services.

It definitely takes time to work through these tasks; however, we have found that this is our best method to maintain client relations. When a client is unable to make an initial payment, or if our schedule is not fast enough for the client, we have each had an opportunity to determine if we are well-suited to work together. Our approach is collaborative and we need to start work with a clear direction.

TIPS AND TECHNIQUES

Educate and Communicate

Diana Melchar, AIA
Chicago

Money is a key issue for all clients. A building project, whether for a residential client or a commercial business, is usually the largest capital expenditure the client will make.

We try to educate our clients about the services we perform on their behalf so they understand how we are spending their money. In this way they learn the value of working with an architect.

Here are three things we do at Geudtner & Melichar Architects.

1. Initially, we discuss thoroughly the design and construction administive phases of our work with our clients so they understand how we can tailor our services to their needs and thus save them money.

2. We keep the client informed of all decisions and discussions that affect the client through fax, telephone, and copies of letters. In this way, the clients are always within the loop of information and understand that we are working hard for them.

3. Our billing invoices itemize all tasks performed during each phase of work by each employee. Therefore, the client can match each task with a time allocation. You'd be surprised how the number of small tasks adds up to a large bill!

Now Here's the Good News

Mark Robin, AIA
Nashville

To build a good relationship with my clients, I try to be honest about the process that we are beginning to undertake. This means telling the bad along with the good. For instance, I explain to the client that they will be working with a sole practitioner who, fortunately for me, is busy with other commissions. If a quick start of the construction is a high priority, then I am not the most suitable architect. If low price is what they want, then again I am not the right guy. I am not the most expensive, but I am not cheap. I can scope services to match fee, but too low a fee will not allow minimal services for the project to be undertaken by a serious architect.

Of course, construction is expensive and slow. There will be days when things go wrong. There might be work that has to be rejected, delays endured to get proper materials or the right subcontractor for the job, or disappointment when a compromise has to be made.

But it is not all bad. I like the analogy from Kidder's *The House*. The process is a lot like having a baby. There is joy in the conception, some discomfort in the pregnancy, and some actual pain in the delivery. But once the baby is here, all the pain and suffering is forgotten and there is plenty of pure joy.

Show Clients You're Worth the Fee

Gabriel Durand-Hollis, AIA
San Antonio

I realize that there are several ways to accomplish the above, but bear in mind the client-architect relationship is dependent on the unique personalities involved. You may be very effective in being either more assertive or passive with different clients. In my practice, I have found that if you can link the clients needs with tasks that you must do to meet those needs, the client has a better chance of understanding your fees. If a lump sum exceeds the client's expectations, I usually identify items that are unusual or extras and show their cost. By backing out landscape architecture, grading, site utilities, planting, permits, as-builts, programming, various investigations, and other items, you show the client the remaining fee in its true context. Similarly, I do not mind sharing the structural and MEP fees with the client since it shows that we are not the only ones in the basic fee. If necessary, I show and list specific or representative tasks and the fee for each phase. That way, several thousand dollars for construction documents does not sound outrageous. Usually, the client responds favorably. If they still want to spend less, I ask them if there are specific tasks that they do not need us to do. With the breakdown of tasks and costs they have a menu of items to pick from, and they are conscious that if they need you to do more later, that you will be expecting to pass on the cost of the added work.

I consider this to be communication rather than persuasion.

Happy negotiating!

(continued from page 7)
Question 14.
WILL I NEED TO DO SOME FREE SERVICE FIRST?

Although this situation is rare (it only occurs in almost every potential commission), I address this issue with flexibility.

Situation A: The potential client is new, unsure of my ability, and seeks some initial sketches to see if I understand the concerns.

Situation B: The client is a source of continuous work and needs to determine the feasibility of a concept before venturing into it. I will work with this client because ultimately the right scenario will emerge to make it a real project. Also I usually am rewarded in the fee structure of this project.

Situation C: Many times a developer will ask for free sketches as a means to get funding or investors. In my opinion this is the riskiest of scenarios for me to put free time into. Often the developer's dream seems sound, a plum of a project if it is successful and one that will lower your guard because you don't want to miss out on an opportunity too good to be true. I will evaluate the risk, see how big my pocketbook is, and ask for a small portion of the fee for this work. It is usually an amount that the developer should be able to pay out of pocket. Though it will not cover my expenses totally, a real commitment has been made by the developer. If the developer can't cover an out-of-pocket expense, then I don't think the job has any merit.

Although I prefer not to do any free work to gain a commission, I will provide nonchargeable time to assist a client in evaluating a site and/ or pro forma for a project if I have a commitment to be the architect.

Small Firms • Great Projects

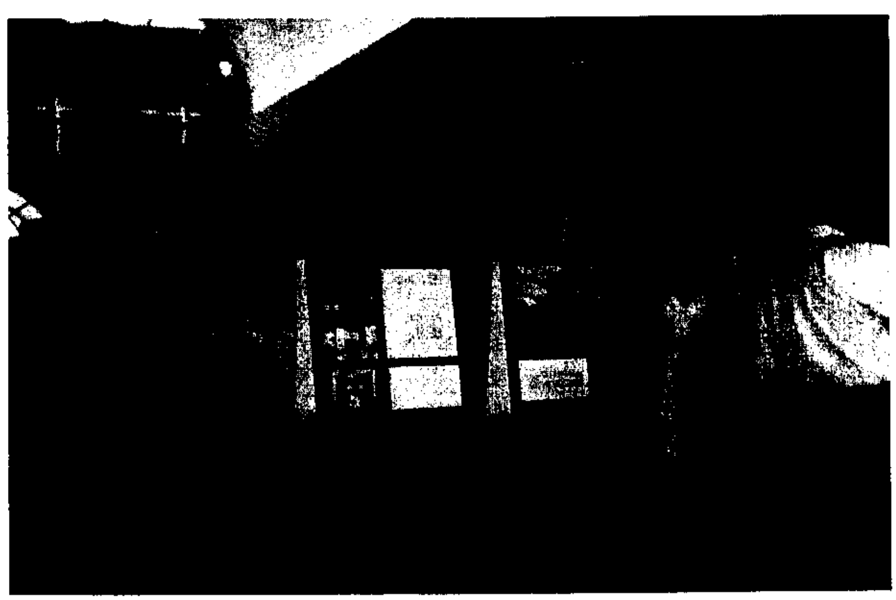
Lauren Mallas, AIA
San Francisco

October marks the completion of my term as chair of the 1995-96 Small Firms Great Projects exhibit and catalogue. The San Francisco Chapter Small Business Committee initiated this program about six years ago to provide a nonjuried exhibit forum for small firms. It evolved into a two-year effort that began with a large exhibition in a major venue and was accompanied by the publication of a first-class catalogue. Following a month of public exhibit, the show moved to our local chapter office. Over the years we have added other venues as well. This year we broke the show into smaller parts and displayed a portion in a gallery that showcases crafts and furnishings. Another portion of the exhibit became part of a large program at the Lawrence Hall of Science in Berkeley, which explored the subject of construction.

At our opening reception at the Contract Design Center in San Francisco last year we had approximately 500 attendees. The show consisted of more than 100 boards and 15 models. I know at least two members who actually met new clients on the opening night. Follow-on articles in local trade magazines also resulted, some featuring specific projects or architects who were part of our exhibition.

What is interesting to me is the enormous popularity of this program. Even in the depths of the recession, when our chapter was struggling to find participants for our local awards program, we had no shortage of applicants for Small Firms-Great Projects. In my view, this may be due to the desire of many architects to exhibit their work unfettered by the judgments of those whom they see as being part of the establishment. In large measure, the quality of the work exhibited and the energy and effort expended on the exhibit boards themselves is equal to what one can find in the awards programs.

Newspaper coverage for our program has been extraordinary. We were fortunate to be the main feature of the "Habitat" section of the *San Francisco Examiner*. Naturally, each time the show goes up, we have more information to give journalists who know that the public does love to see and hear from and about architects and architecture. We are building on previous success and this is giving us a presence and a credibility with the architectural press.



San Francisco Chapter Small Firms • Great Projects

The catalogues— we have now published two— are the most difficult part of the effort, and in some ways, the most rewarding. These little books are sold at our chapter and have become a wonderful document of the local work of small firms. I personally use them as a business development tool. Prospective clients enjoy getting them as an introductory gift. Several members have told me that the primary reason they are members of our chapter is so that they can participate in Small Firms • Great Projects.

To produce this type of program one needs much help and support from the local chapter, and in that regard our chapter staff is superlative. It is understood that the architect chairing the effort is in for a lot of hard work. Luckily we are all trained for it. My reward has been meeting the individuals who make up the local network of small firms that do great projects.

Virtues of the Virtual Office

Lavae Aldrich, AIA
Seattle

Telecommuting has come to this small architecture office in a big way. I never imagined it could work so well and attempted it only out of severe frustration and exhaustion. What I have found is a new rhythm to my work, integration of my work and personal life, efficiency and higher productivity, and more free time.

The main reason I opened my home office was to save me from commuting during rush hour. They've been working on the stretch of freeway between my home and office for over 25 years. It's no longer a joke. When they tore up the local highway link and the hour-long commute stretched an additional half hour (even longer in the rain), I started working at my home computer in the morning and making the drive a little later. I soon found myself leaving the office a little earlier to avoid the afternoon rush and then putting in a few hours after dinner. What started as a stop-gap measure to deal with a very bad situation has turned into a new way of working with far greater convenience.

My work hours are now much more flexible. Even for a sole proprietor with no employees I tended to be pretty regimented. Not that my home office is fully functional, and is in fact where I keep most of my project files and materials library, it is the base of operations. I go to town to retrieve the mail, meet with clients and engineers and, since I share office space with another firm, I occasionally go to town for camaraderie. (Though loneliness has never been a real problem for me, I can bury my head in the sand if not prodded out by others to look around.) Matching computers in both locations allows me to resume work quickly wherever I am. I keep a trunk full of current files and drawing prints. When I arrive home at four, I go directly to my home office, retrieve my calls, and resolve the end-of-day issues before my colleagues leave for the day. Or I can make the calls from the road via cellular phone. Then, while they are fighting the traffic I just beat, I put in two productive hours. I can quickly resolve on paper the problems I've been meditating during the mesmerizing drive. This trance is assisted by the absence of radio in the car.

My altered commute quickly grew into no commute at all. My schedule varies with the needs of others, but now I try to stay at home two full days each week. I find the solitude of working at home in a quiet house very conducive to concentrated work. I have developed a rhythm of days in town running from meeting to meeting; doing errands; finishing low-brain-power work like correspondence and bookwork; and balancing all that against full days of real work at home designing and drawing. I'm often amazed at the mounds of work I can accomplish in a few quiet hours. Even my breaks are more relaxing and efficient. I drop a load of wash in the dryer and take the dogs for a walk. I'm getting exercise again, saving on lunch money, and eating better. The dogs think it's a good thing.

Of course these home days are not completely my own—with the phone still sitting on the desk I am as available as ever. Call forwarding, call transfer, fax modems, and answering machines have made my move fairly seamless. Most of my clients don't know where I am working on a particular day. All my calls go to the base phone number in town. When I go home I forward calls to my home office, reversing the process when I return to town. Because I work alone and because my home happens to be served by one of two exchanges in the state that still have ancient phone equipment, I have selected identical answering machines in each office. Had circumstances been different, I might have chosen voice mail. Call transferring allows individual calls received by my itinerant staff at the base number to be sent to me at home. Faxes come into my computer at each location and would be even more convenient if I would spring for a second phone line and simply forward those calls as well.

Setting up my home office did require some capital improvements, but the expense was easily covered by reduced rent in town. Because I share office space with a growing firm, I was able to reduce my overhead while retaining my address. They accept deliveries for me in exchange for a rented desk space that's quiet half the week. The conference room and shared equipment remain at my disposal. Besides the computer, phones, and fax, I brought home my copier, sharing that of my office mates when in town. Surge protectors on everything are supposed to save me from the frequent power outages we experience in this pocket of old power grid and high winter winds. I hope my insurance will deal with the alternative. A Zip drive has finally solved the problem of transferring large CAD files between computers.

Working at home has encouraged me to look at new markets. I have developed a nice relationship with a builder I noticed on the way to the post office. They have referred a couple of fat residential projects to me and we are currently going after a new office building together. They're not used to good architectural service out here on the edge of growth and enjoy the fact that I can respond to them quickly because I'm local. If I hadn't been working here in the community, I would never have stretched to get to know these people and I could not serve them at their convenience. Since then, I have introduced myself to several local furnishings and floor coverings outlets in hopes of referrals. However, advertising in the local fish wrapper for nearly a year yielded nothing.

For me, telecommuting was a response to a bad situation, a dreadful commute that left me tired, irritable, and always late. The resulting home office has solved that dilemma and rewarded me in many ways I never imagined. My life is more integrated. I have more free time. I meet schedules more reliably. Or, when I don't, I can write overdue articles for newsletters at dawn and fax them off before I take my shower.

Forum Business

We'd like to share a few thoughts about our work here, in particular our newsletter efforts and upcoming programs at the 1997 AIA National Convention in New Orleans.

We have done some rescheduling of the newsletter publication dates this year. For this reason and because of some unexpected production difficulties, which we believe have been resolved, our newsletter mailings have been later this year. In past years, our first newsletter arrived February 1, which meant unfortunately that mailing labels were based on the prior year's forum membership. We have shifted the delivery dates for our three issues to April 1, August 1 and December 1. Thus, all newsletters will mail to the current year's membership. And, for those of you who never received issue No. 6, be advised that we are especially challenged by the number series 1-10, and, therefore, our newsletters will always number one number higher than the actual number issued.

The issue themes for 1997 will be as follows:

SPF Report No. 10, April 1997, "Marketing"

SPF Report No. 11, August 1997, "Time Management"

SPF Report No. 12, December 1997, "Computers for Design and Visualization"

We are also pleased to report that all three of our '97 convention program proposals have been accepted. The topics were developed, as promised, from the information provided by forum members in our 1997 SPF survey. The seminar/workshop programs are:

"Well-Controlled Chaos: Time and Project Management for Small Projects and Small Firms." Cal Poly Resident Fellow James Franklin, FAIA, will present.

"Negotiation as a Core Skill: What Small Firm Principals Need to Know." This highly interactive workshop will also be presented by Franklin. Those of you who have ever attended any of his workshops such as "Doing Small Projects Successfully," know he puts on a very engaging presentation.

"Tapping for Dollars: Small Computers for Marketing, Promotion, and Client Management in Small-Project and Small-Firm Practice." This roundtable discussion will be jointly sponsored by SPF and the Computer-Aided Practice PIA.

In addition we will be hosting our Fourth Annual Small-Project Forum Brochure Exchange. You will have an opportunity to have your marketing material reviewed by specialists, see the marketing efforts of other firms like your own, hear summary remarks by the experts, and last but not least, meet, converse, and imbibe with other SPF members from around the country.

As a final note, the Small-Project Forum thanks John Reese, formerly of AIA Dallas, for his generous contributions to the Forum this past year in his capacity as local advisor from AIA Dallas. The local advisors, a listing of which you will find at the back of this newsletter, are a great source of strength for the Forum. We are grateful to John and all the others for their ongoing contributions. If you would like to work with us in a similar capacity as a liaison and contributor from your chapter, please contact one of the advisory group members, McMonigal, Wardlaw, or Pozolo.

We are working hard to make the Small Project Forum a unique and useful resource. Hope to see you around in 1997.

Conference Report

The Practice Management PIA, with assistance from the Small Project Forum, Computer-Aided Practice PIA, and the Specifications and Building Technology PIA, hosted a two-day national conference on practice management and firm ownership transition. The following articles by McMonigal and Wardlaw report on two seminars thought to be of interest to SPF members.

McMonigal reports on the presentation by McMonigal, Wardlaw, and Pozolo entitled, "How Three Firms Do Small Projects Successfully." Wardlaw reports on the presentation by Grant Simpson, AIA, and Jeff LaRue, AIA, both of HKS Architects, Dallas, entitled, "Focus on Documents: The Future of Construction Documents."

How Three Firms Are Successfully Doing Small Projects

Rosemary McMonigal, AIA

At the recent practice management conference in Tempe, Ariz., three architects presented their firm's approach for doing small projects. They were: Donald Wardlaw, AIA, with Donald Wardlaw Architects; Cynthia Pozolo, AIA, with Albert Kahn Associates, Inc.; and Rosemary McMonigal, AIA, with McMonigal Architects.

Each architect represented a different perspective on the size of project their firm considers small. At Albert Kahn Associates, Inc., a small project is considered one with a construction budget of $750,000 or less. Donald Wardlaw Architects considers any project he can do himself a small project. McMonigal Architects classifies as small those projects with construction budgets under $100,000. All three firms are committed to doing small projects within their firm.

Albert Kahn Associates, Inc.

Cynthia specializes in small projects through a market-segment-focused group at Albert Kahn Associates, Inc., a firm with 326 employees. The group started as a pilot program in 1991 and as a formal group in 1992. Currently, the special projects group is 16 people, although the size has ranged from 4 to 22. The project types are diverse, in fields such as health care, tenant fit-up, commercial/office renovation, research and development, industrial, and miscellaneous projects. Cynthia is responsible for marketing, budgeting, scheduling, and financial management of a small firm within a firm.

In Cynthia's group, they have established procedures for managing small projects. The team is composed of a member from each discipline—architectural, structural, mechanical and electrical—who understand the process for completing a small project. The project must be done thoroughly and quickly. The specification department has prepared a questionnaire for the project architect to complete. This information generates an abbreviated specification. Written procedures have been established for similar project types and repetitive clients.

Cynthia recommended the following steps for effecting change within the firm.

- Evaluate small projects within your firm.
- Identify a strategy for implementing change.
- Test your strategy.
- Push the limit.
- Obtain feedback and respond accordingly.
- Be flexible yet objective.
- Be an example and share your knowledge.
- Reward and enjoy your successes.

Donald Wardlaw, Architect AIA

Donald is a sole practitioner enjoying the identity and accountability of being the company. A limitation of being a sole practitioner is the limit on the size and scope of projects. Donald finds that his firm is ideally positioned to run small projects.

In establishing his office, Donald recognized that revenue would be limited to what he could bill for his own time, not that of employees. Maximizing his time spent on projects means spending very efficient time managing the business. Donald sees three defining principles of a sole practice:

- A sole practice must be efficient.
- A sole practice must be agile.
- A sole practice must have sophistication.

The computer plays a key role in Donald's practice. Office support functions like bookkeeping, contracts, database, and correspondence are all handled efficiently and electronically. All drawings are prepared on the computer, including 2D and 3D work. As a sole practitioner, Donald's agility allows him to incorporate new skills in the office, broaden the efficiency of work, and expand the services offered to clients.

Since the beginning of Donald's practice, he has collaborated with other architects on small projects or smaller parts of large projects. In 1996, he has worked with six firms doing everything from construction administration to design consulting, code research to presentation graphics, and 3D visualizations to construction documents.

McMonigal Architects

At McMonigal Architects, the decision to do small projects is focused on four key reasons.

1. Expand our project experience and diversify our work.
2. Serve new clients and continue work with former clients.
3. Provide services to clients who may not feel they can afford an architect.
4. Position us for larger projects.

McMonigal Architects has five people: three registered architects, a designer, and an administrator. Typically, 20 to 25 projects are going at one time. A schedule is updated every month showing the next eight months, identifying phases for each project, deadlines, and those projects on-hold. When too many deadlines are converging, another architect is brought in to help. These architects are borrowed from other firms. Over the last four years, architects have been on loan for about five months of each year.

Managing many small projects requires careful time allocation. The architects all maintain their own weekly to-do lists for each project, which allows each to track the small but important details. Each architect is a project architect for multiple small projects and one or two larger projects.

Early design work is produced by sketching and models, with some modeling done through UpFront and 3D Home Architect. By design development, the drawings are on computer. Using AutoCad LT, documents are shared with consultants who are on AutoCad V12 or 13. The three architects do most of their own correspondence (Word for Windows) and cost estimating and spreadsheet work (Excel). Specifications for single-family residential projects are prepared in-house, while a consultant is retained for specifications on all commercial projects.

Rosemary notes that their single biggest challenge on small projects is profitability. It seems to take a similar amount of meetings, bidding time, etc. on a small project as a much larger one. Finding consultants, especially mechanical and electrical engineers, to work on smaller projects is difficult. Most will work only on an hourly basis, which is not usually acceptable to the owner.

McMonigal Architects challenges themselves to test theories and explore varied approaches to space, materials, and new technology. Often it takes more time than the small-project design fee allows. Honestly, it is okay on some projects to pay for the opportunity to work with a new client and discover a better process or produce a small project of lasting significance.

Big Firms Can Draw

Donald Wardlaw, AIA

Conventional wisdom has it that small-project practice requires practice methods that differ from those employed on larger projects. It is thought that tight fee margins and short project schedules drive process economies. It is also thought, conventionally, that methods employed by large firms may be inappropriate for small projects.

Perhaps conventional wisdom tempts nature to introduce contrary truths. In their presentation, "Focus on Documents: The Future of Construction Documents," Grant Simpson, AIA, and Jeff LaRue, AIA, principal and associate respectively at HKS Architects, Dallas, explored the concerns that drive the evolution of a large firm's construction document methods. I found those concerns similar to those driving the evolution of small-project document techniques. Some of their methods may have use in the context of small projects.

With a staff of about 350, HKS is one of the largest architecture firms in the U.S. Their projects tend toward large commercial and institutional types. Over the last 5+ years, they have taken a different course in the way they organize and produce construction documents. Their effort was spurred by a need to make their drawings and specifications both less of a risk for errors and omissions and more of an aid to the builder in the construction process.

One of their objectives was to work new understandings of proper detailing into their documents as quickly as possible. These new understandings arise from field reports on constructibility, cost, and performance as well as code changes and changing industry requirements or recommendations. Maintaining a library of details is for them a matter of maintaining a body of knowledge. That knowledge represents a considerable investment of firm resources and the return comes in being able to reuse details with minimal redesign effort. HKS keeps the library in electronic form since that allows the easiest modification of the details. Interestingly, in their large office situation they do not allow paper copies of the library to exist. The fear is that changes could not be made as quickly and the process would become mired in bureaucratic procedures.

Another guiding principle in their construction document strategy is the reduction of redundancy. This means in particular avoiding repeated notes on similar details, repeated information on plans of varying scale, and repeated dimensions in varying locations. The aim is to facilitate the coordination of changes and eliminate accidentally conflicting requirements. Repeated information is replaced with a profile and a reference to a single source for the amplified description. HKS has also implemented a review step called "bluelining". It is a review for redundancy with redundant information highlighted by a blue marker. Bluelining serves both to identify problem areas in a particular job, and help make the spotting of redundancy a more developed skill.

Another concern is the clarity of referencing. Smith demonstrated that long numeric information and complex alphanumeric are more difficult to comprehend and mentally process than text-based information or short numbers. He finds that systems like ConDoc and other elaborate alphanumeric systems (including systems developed previously at HKS) hinder the navigation through document sets. In an effort to simplify this process, HKS has adopted a "sequential numbering" system. Each detail has a unique number and are numbered sequentially as they occur through the set. HKS allocates "slots" in each sheet during a process of cartooning the set. Another approach would be to number and key the details in the final plan review before plotting. It has also been suggested that the title block for each sheet might indicate the detail series that occurs on that sheet.

"Working in context" means that information that amplifies is placed near the general information it is intended to amplify. HKS applies this concept liberally both to make the nature of the work easier to understand for the builders and also to aid coordination of the drawings by the production staff. Examples would be putting foundation details beside the foundation plan, cabinet elevations occuring on the floor plan sheet, wall details occuring next to wall or building sections, window and door details adjacent to window and door schedules, and so on.

To minimize charges for omissions on bid projects, HKS includes "default requirements" for many systems and assemblies. In a context-sensitive manner, default requirements are stated for items such as partitions, doors, floor finishes, ceiling material, windows, etc. Typically the default requirement is the most typical item or assembly. If detailed requirements are not noted for a particular element in a particular instance, the contractor is required to provide the default item. It is found that often the desired item is the default item and also that if it is not, it is easier and less expensive for the owner to change something provided than to add an entirely new element.

As a final note on specifications, I found it interesting that large project specifications at HKS are moving in the direction of methods used on small projects—shorter and simpler. One way to make the spec simpler is to remove repetitive requirements like "cleanup" which, in a narrow-scope specification at least, may occur over a hundred times. They find that the desired effect can be engineered simply by making general requirements apply broadly. Another effort is to minimize instructions to the contractor on how to do things, like clean with acid here, solvent somewhere else. Hazardous materials concerns also play a role here. And increasingly they are referring to performance requirements, tested systems, and manufacturer's recommendations. Lastly, they have worked aggressively to limit submittals to only those things that are truly needed.

Smith & LaRue provided an engaging presentation that was well received by both large and small practitioners in attendance. This program, in my opinion, deserves a broader audience. AIA convention would be a suitable venue.

(continued from page 3)

excellent snapshot of how much will be needed at each billing cycle.

If your potential client asks you to work on a speculative basis until financing is in place, you clearly have a business judgment to make. You need to assess the odds of the client's ability to get the loan or grant, what happens if that does not happen, and your firm's ability to lose the fee and survive. Then, too, does the risk match the gain? One federal agency offers elderly housing grants to nonprofit that, in turn, request free schematic designs from architects. If the nonprofit receives a federal grant, then the architect is awarded a contract, but may not receive any fee until construction starts and all too often that is at least two years down the pike.

While clients who ask you to provide free, up-front services are loathe to give you a contract, it is a good idea to demand one. It needs to state that you are unequivocally the architect of record and the terms of payment, either when the project is funded or such interim payments as you may eke out.

Successful practices are built on successful relationships with clients. Like all relationships, they need to be carefully cultivated. You need to start on day one with the courtship. But if there is no chemistry, you may want to consider your options. Another architect from your firm may be one option to explore. A non-office, unstructured, or informal meeting can sometimes break the ice. And sometimes you will need to tell your potential client politely to find another architect.

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If you would like to report on issues relevant to the Small Project Forum from your area on a regular basis, we invite you to join our network of local Advisors. Please call Rosemary McMonigal, AIA.