

# AGENDA

## Design Process Meeting

Project Name  
Project No.  
1 of 7

**Purpose:**

This checklist will assist in presenting the design process to the client. The reason for discussing the design process with the client is to ensure they understand our scope of work, how we intend to accomplish it and what part they play in the process.

**Date/Time:**

**Preparation:**

Review this checklist and tailor it to the particular project. Review the Owner/Architect Agreement.

**Bring:**

- Minimum of two copies of the blank Owner/Architect Agreement.
- This checklist.
- Notepad.

**Meeting Minutes:**

**Multi-media Needs:**

**Attendees:**

# AGENDA

## Design Process Meeting

Project Name  
 Project No.  
 2 of 7

### INTRODUCTION

Explain to the client that the AIA Owner/Architect Agreement, whether it is being used for this project or not, is a good outline for explaining the process and that we will use it to guide our discussion.

Give the client a basic overview of the process. Explain each phase and the general objective of that phase.

### 2.1 SCOPE OF SERVICES

Required Consultants:

Consultant	Architect	Additional Service	Owner	Remarks
Educational Funding		X	X	
Programming		X	X	
Environmental			X	
Geotechnical			X	
Site Survey			X	
Hazardous Materials Survey			X	
Civil	X			
Structural	X			
Mechanical	X			
Plumbing	X			
Electrical	X			
Estimating	X			
Landscape Architect	X			
Acoustic Engineering		X		
Educational specifications		X	X	
High Performance Design		X		
Graphics/Signage		X		
Door Hardware	X			
Aquatics		X		
Theatrical		X		
Technology		X		
Stadium lighting		X		
Water features		X		
Security		X		Discuss Basic Services
Interior Design		X		Discuss Basic Services
Access controls		X		
Inspector of record				X
Testing engineer				X

# **AGENDA**

## **Design Process Meeting**

Project Name  
Project No.  
3 of 7

Explain to the client that there are a number of consultants that they will need to contract directly with; in contrast to us contracting with the consultants. Generally this scope of work deals with the existing conditions of their property. History reveals that the client must be responsible for their property and provide site information that the architect can rely upon when preparing the design. Site surveys, geotechnical investigations, environmental reports and hazardous materials reports are examples of work that must be done under direct contract to the client. If these reports were done as part of the architect's scope of work, the architect would then become liable for information about a piece of property that is owned by others.

However, we can assist the client with standard Request for Proposals templates and specific scope descriptions for most consultants work.

### **2.2 SCHEMATIC DESIGN PHASE**

**2.2.1;** explain that Programming services are not part of our Basic Services and note whether they have been added to this project. In either case, it is very important to have an example of an acceptable program to show the client. They should understand how all subsequent work grows from the program and how an inadequate program will ensure problem after problem.

If the client has a program already completed, we will review it for completeness and accuracy.

Until the various site surveys are completed we cannot begin the schematic design.

**2.2.4;** review the exact scope of the deliverable documents for the Schematic Design phase. Note any models, renderings or computer graphics that may be involved.

Ensure the client understands they will be required to give written approval of these documents and refer to Additional Services section 3.3.1.

Explain deliverables.....

Explain estimates...contingencies

Limits to number of meetings.....

### **2.3 DESIGN DEVELOPMENT PHASE**

**2.2.1;** explain that Programming services are not part of our Basic Services and

#### **Required Tasks:**

Phase 3 programming...