



Identifying the Services You Need

You may already know the scope of professional services required for your project, but most owners want to work with their architect to identify what is needed. Different projects require different combinations of architectural services. An early task is to identify those services essential to the success of the project.

The Important Choices:

Most projects require a set of basic services typically provided by architects: preliminary (usually called schematic) design, design development, preparation of construction documents (drawings and specifications), assistance in the bidding or negotiation process, and administration of the agreements between you and your builder or contractor.

Some projects will require other services. For example, predesign work may be essential: facilities programming, surveys of existing facilities, marketing and economic feasibility studies, budgeting and financing packages, site-use and utilities studies, environmental analyses, planning and zoning applications, and preparation of materials for public referenda. Projects may also require special cost or energy analyses; tenant-related design; or special drawings, models, and presentations.

Not all services must be provided by the architect. Some owners have considerable project planning, design, and construction expertise and may be fully capable of undertaking some project tasks themselves. Others find it desirable or necessary to add other consultants to the project team to undertake specific tasks. Here discussion will be necessary to establish who will coordinate owner-supplied work or other services provided beyond the scope of the architect's agreement.

There are two effective approaches to establishing services:

- Establish a set of basic services — a standard grouping of services common to many projects. When you use this approach, a second category of additional services is used to cover pre design services as well as a wide variety of special studies or services that some projects require (like those mentioned above).
- Use the designated services approach, which asks owners and architects to select an appropriate complement of services from an array developed by the AIA and presented herein.

The AIA publishes standard-form owner-architect agreements for both of the above approaches. AIA Document B141, Standard Form of Agreement Between Owner and Architect, and its condensed version AIA Document B151, Abbreviated Form of Agreement Between Owner and Architect for Construction Projects of Limited Scope, both embody the basic services approach. AIA Document B163, Standard Form of Agreement Between Owner and Architect for Designated Services, is used to employ the designated services approach. In fact, B163 provides a range of 83 separate architectural, interiors, and construction management services from which to choose. The owner pays only for the services necessary for the project's success, and the architect can effectively measure the firm's time and resources.

Deciding on Services:

The best strategy is to sit down with your architect and identify the services needed.

Some advice:

- Use the AIA's list of designated services as an initial discussion guide. Doing so provides a chance to talk about all possible service options.
- Recognize that even when a number of services are designated at the outset, other services may be required once you are under way. For example, you may require zoning approvals or you may wish to do economic analyses of a new energy-saving system. Other services may be added to an existing agreement at any time.
- You may opt to set aside a design contingency budget under the joint control of you and your architect to fund design changes and refinements once construction begins.
- Construction contract administration services are a case of spending a penny to save a dollar. When you've taken care to see that a building has been designed as you want, you certainly want it built as it was designed. Your architect can observe the construction work for its compliance with drawings and specifications; approve materials and product samples; review the results of construction tests and inspections; evaluate contractor requests for payment; handle requests for design changes during construction; and administer the completion, start-up and close-out process of your project. Getting the building that was designed—and on budget—is important. Attaining that goal requires considerable experience, time, and effort. Ask your architect.
- Most disputes arise during construction, which, for you, is an important consideration. In such a situation, according to AIA standard forms, your architect serves as an impartial mediator/arbiter between you and your contractor. The AIA standard forms also call for arbitration and, sometimes, independent mediation, both of which are provisions to find solutions outside of a courtroom.

- An agreement for post-construction, building evaluation— perhaps a joint inspection by you and your architect six months after the building is occupied— will help to serve as a checkup that the building is being used and maintained properly.
- The specifics of your project will guide your choice of agreement form. The designated-services approach requires a little more effort up front, as it involves the decision of which of the 83 possible services to include. However, designating services brings discipline and clarity to the process of deciding who will do what.

What If There Are Too Many Unknowns?

Sometimes, too little is known about the project to determine the full extent of professional services in advance and proceed to a contractual agreement based on designated services. If this is the case, consider engaging the architect to provide project definition and other pre-design services first, with remaining phases and services to be determined later.