

**PROJECT
PLANNING PACK**
for
**BUILDING AN ULTRA
HIGH-PERFORMANCE
HOUSE**



**DANIEL CLARKE
ARCHITECT**

SAMPLE EDITION

© 2023 Daniel Clarke Architect
dclarke@dclarkearchitect.com

table of contents

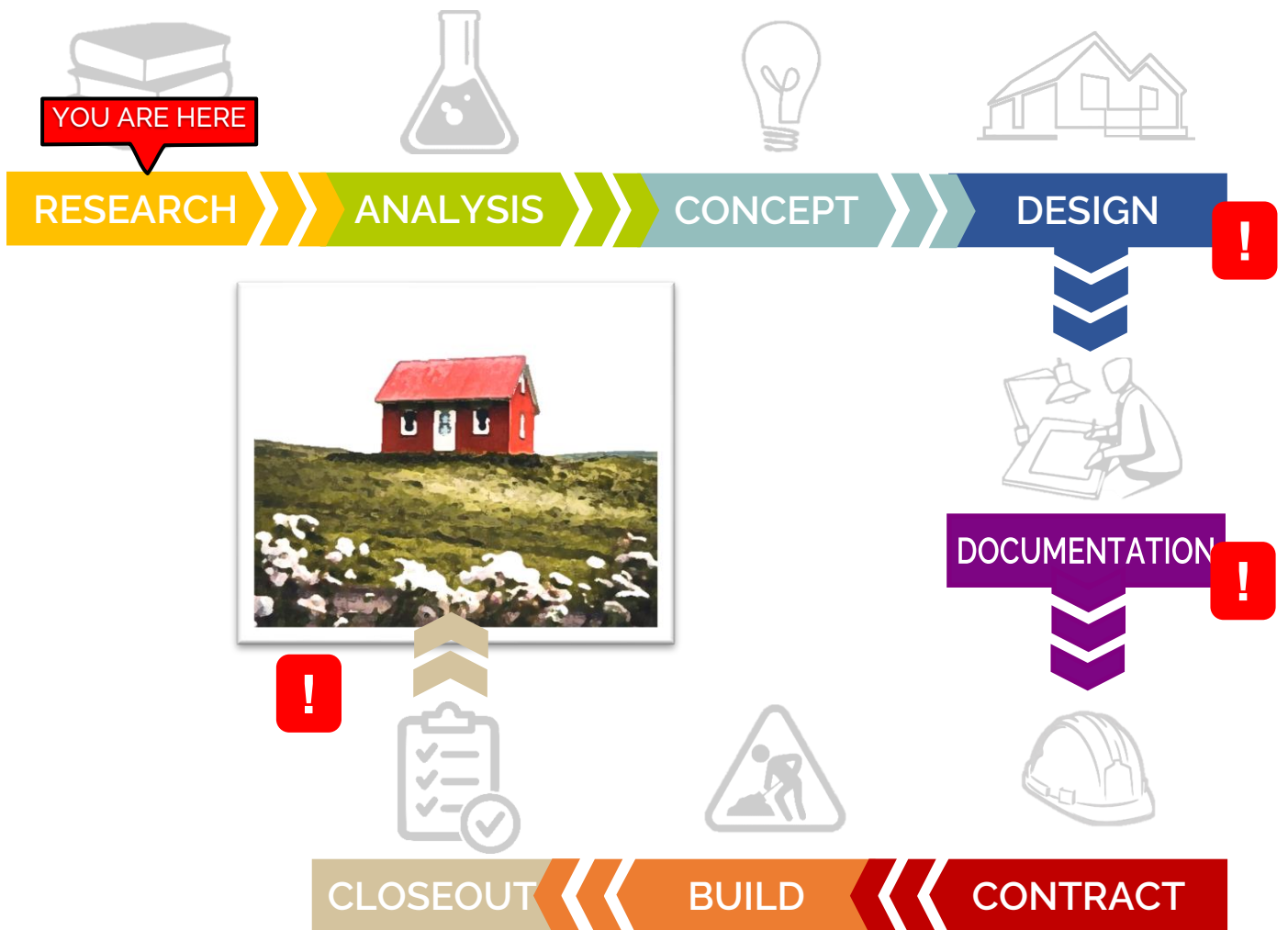
PROJECT ROADMAP	01
PROJECT SUMMARY	02
DESIGN PROCESS	03
DESIGN BRIEF IN ONLY 7 QUESTIONS	04
FUNCTIONAL PROGRAMMING	05
FUNCTIONAL PROGRAMMING WORKSHEET	06
PERFORMANCE GOALS	07
REGULATIONS - BYLAWS	08
REGULATIONS - ZONING	09
DOCUMENTATION AND PERMITTING PROCESS	10
COST ESTIMATOR	11
SOFT COSTS SUMMARY	12
ARCHITECTS – MYTH AND REALITY	13
ARCHITECTS – TOP 7 MYTHS	14
FINDING AN ARCHITECT - FAQ	15
BUILDING EXPERT DIRECTORY	16
CONSTRUCTION SEQUENCE OVERVIEW	17
PREPAREDNESS SELF-EVALUATION	18

the roadmap

This is important ... please read carefully.

Right now, you should be in the **Research Phase**. This is where you are gathering information and playing around with ideas. At the point you want to get serious, you will want to check the feasibility of your ideas and understand what the project constraints are. If you are ready to work with me, we will continue

the Research Phase by performing a **Pre-Design Diagnostic Scan™** and then transition to the **Analysis Phase** by conducting a **R.A.D. Study™** to eliminate assumptions, identify constraints and find your best options. You will receive a document that can be used by me or any other architect that will ensure you reduce project risk and get the best options for your site and budget.



When you are ready to review the feasibility of your project, email or call me >>

project data

Fill out this sheet based on your proposed project, and take it with you when discussing your project

Civic Address	Legal Address
Parcel ID	Zoning District
Legal Property Survey, Topographical Survey	Geotechnical Evaluation
Rezoning Required	Development Permit Required
Building Area (BCBC / VBBL Definition)	Total Floor Area (Zoning Definition)
Building Height	No. of Storeys
Property Purchase Cost	Real Estate Soft Costs
Building Construction Cost Estimate	Building Soft Costs Estimate
Architect Required?	Part 3 or Part 9?
Municipal Services in Place (Water, Sewer, Power)	Site Topography (Flat, Sloped, Waterfront)
Authority Having Jurisdiction	Special Regulatory Bodies Checklist (e.g. Environmental)
Functional Program Complete	Secondary Suite / Lock-off Suite / Two Dwellings / Infill
Sprinkler Requirement	Energy Efficiency Standard / Energy Step Code Level
Basement	Garage (No. of Cars, Enclosed/Detached)
Budget	Rear Lane

A Pre-Design Diagnostic Scan™ is an easy way to get this information.

your design journey

Below is a general, simplified sequence of activities starting from your idea to build or remodel up to the finalization of the building design.

- 1** You create your **Design Brief, Functional Program** and set **Performance Goals**. You could hire an Architect as early as this stage to help you flesh out your requirements and to propose and explore new options.
- 2** Determine zoning and Planning Department restrictions and requirements
- 3** Determine permits required (DP, BP, etc.)
- 4** Determine if your projects is required to involve an **Architect**
- 5** Consult with an Architect or house designer/planner to review project details and budget
- 6** Hire the Architect
- 7** Cost estimate including soft costs
- 8** The Architect will review your functional program and the regulations for your property and will advise on issues or deficiencies.
- 9** Architect creates **Schematic Design** options for your review, discussion, and selection. This stage establishes the building's size and general shape and the arrangement of spaces. These options usually begin with sketches of the site and floor plans. Computer-drafted drawings generally follow as you and your Architect refine this stage of the design.
- 10** Architect proceeds with **Design Development** which adds definition and detail to the Schematic Design and results in drawings for your review, discussion, and selection. These drawings form the basis of the Development Permit (DP) documents.

It's never too early to consult with or hire an Architect – even as early as step 1! Having an architect on board earlier can save you huge amounts of time in working out your program and researching the regulations applicable to your property.

*You can read more on the design process in my Design Process Guide:
[.dclarkearchitect.com/introduction-to-the-design-process](https://dclarkearchitect.com/introduction-to-the-design-process)*

focus. decide. move forward.

Alice: "Would you tell me, please, which way I ought to go from here?"

The Cheshire Cat: "That depends a good deal on where you want to go."

Alice: "I don't much care where."

The Cheshire Cat: "Then it doesn't much matter which way you go."

The method below is my trusted 7-Question Design Brief creator. You can request a more detailed - but still simple - guide by visiting dclarkearchitect.com.

YOUR QUESTION

ANSWER

- 1 Outline your current situation
- 2 How do you live? Is that changing or about to change?
- 3 What will you need to *SEE* to know your project has been a dramatic success?
- 4 How do you want to *FEEL* as you move through your new space?
- 5 Who are the important people this home needs to be designed for?
- 6 What are the budget, timeframes, and boundaries within which we need to work?
- 7 What does your home really mean to you?

To download my full design brief guide, visit dclarkearchitect.com

your unique home life

The program lists and describes **spaces** and **rooms**, their **adjacencies** and/or **separation**, and how they **relate** to each other. This includes **views** between them and to the outdoors or to special views. Think of any special hobbies you have and all your home activities (work and pleasure). Where do you spend most of your time? Also identify equipment and plumbing fixtures you want, but don't worry about finishes at this stage.

Circulation

Front Entry	Rear Entry	Garage Access	Main Stair
-------------	------------	---------------	------------

Gathering Rooms

Family Room Lounge	Home Bar / Lounge Music Room	Sitting Room Home Theatre	Media Room
-----------------------	---------------------------------	------------------------------	------------

Food and Eating

Kitchen Wine Cellar Eating Island	Butler Pantry Cellar	Spice Kitchen Dining Room	Pantry - dry goods Breakfast Nooks
---	-------------------------	------------------------------	---------------------------------------

Bedrooms

Master Guest Adult	Children Shared Guest Children	Kids' Bedroom(s)	Second Adult
-----------------------	-----------------------------------	------------------	--------------

Bathrooms

Master	Secondary for bedrooms	Powder Rooms	Water Closets
--------	------------------------	--------------	---------------

Tasks and Utility

Home Office Workshop	Sewing Room Mud Room	Crafts Room Garbage Area	Study / Library Laundry
-------------------------	-------------------------	-----------------------------	----------------------------

Storage

Linens Entry Coat Closet	Seasonal Storage Bedroom Clothes Closets	Tools / Supplies Storage Clothes Storage	Broom Closet Long-term Storage
-----------------------------	---	---	-----------------------------------

Recreation and Other

Recreation Room Reading Nook Sauna	Exercise Room Pets Steam Room	Kids' Play Room Garage Mechanical	Flex Room Tool Shed
--	-------------------------------------	---	------------------------

Exterior

Dining Playground	Lounge	BBQ Area	Pool
----------------------	--------	----------	------

Appliances

Ovens (gas, cooktop, wall)	Laundry	Refrigerator, Freezer
----------------------------	---------	-----------------------

Fixtures

Shower (rainfall, enclosed)	Kitchen sinks (1, 2, or 3 compartments)	Bathroom Sinks
Toilets, Bidets	Bathtubs (standalone)	Janitor Sinks
	Prep Sinks	

how will you score your home?

Identify the importance to you each item below, and rate how well you want your home to perform in that area

INTERIOR

Create a healthy interior environment:

- Fresh Air
- Daylight
- Comfortable relative humidity / Uniform Temperature
- History
- Artful
- Wow factor
- Spacious
- Views to Exterior
- Natural Indoor Materials

PSYCHOLOGICAL

Ensure that the interior satisfies social and psychological needs and promotes mental well-being:

- Interesting Spatial Layout
- Connection to Exterior
- Lighting Quality and Variation
- Age-in-place or multigenerational capacity
- Security
- Status
- Symbolic
- Comfort
- Peacefulness
- Sense of place / Story
- Playful
- Functional
- Productive
- Sanctuary
- Personality

EXTERIOR

Protect against exterior forces and conditions:

- Extreme heatwaves
- Extreme cold weather
- Deluge / atmospheric river / weather bomb
- Flooding and Sea Level Rise
- High winds / Tornadoes
- Drought tolerance / Rainwater conservation
- Earthquake hazard and resistance
- Wildfire risk and resistance
- Airborne contaminants (natural, synthetic, and biological)
- Ice storms
- Hailstorms
- Dust storms
- Utilities Disruption / Outages

ENVIRONMENTAL

Minimize negative impact on the surrounding natural environment, and the worldwide ecosphere:

- Durability
- Embodied Carbon and Reclaimed Materials
- Vegetation / Green roof / Green wall
- Stormwater Infiltration
- Wildlife habitat integrity
- Integrated into landscape

LONGEVITY

Design the building to perform at a high level of comfort and efficiency for at least 50 years:

- Airtightness
- Long-life Materials
- Weathering Materials

COST-EFFECTIVE

Reduce unnecessary expense

- Optimized Layout
- Multi-use Spaces
- Structural and Form Simplicity
- Efficient Ventilation and Plumbing Systems
- Minimize Artificial Lighting
- Minimized overall energy use

***Learn more about these by downloading my SAPPHR Strategy Guide:
dclarkearchitect.com/my-process***

want to see the rest?

This is a sample of the full guide, which you can download for free at dclarkearchitect.com/resources.

*Learn more about bylaws in this article:
dclarkearchitect.com/post/permits-part-3*