

Design Development Matrix

Development	Design	20 Steps to Design Quality
CONCEPT PHASE		
<i>What goes on in the development process</i>	<i>What goes on in the design process</i>	<i>What to do to ensure a well designed project</i>
<ul style="list-style-type: none"> • Establish organizational goals for the project. • Determine type of project, Potential location and target occupants. • Consider sources of financing and how the project might be managed. • Develop an understanding of community and local government support/opposition, concerns/needs. • Evaluate site: cost and availability, technical and environmental issues. • Visit and evaluate similar projects. • Develop project vision and concept. • Decide whether to explore the concept further. ➤ Outcome: specific use of a designated site for an identified market by a specific development team with a defined financial program. 	<ul style="list-style-type: none"> • Pre-Design Phase - Activities May Include: <ul style="list-style-type: none"> ➤ Programming ➤ Space Schematics/Flow Diagrams • Site Analysis Phase – Activities May Include: <ul style="list-style-type: none"> ➤ Site analysis and selection 	<ol style="list-style-type: none"> 1. Start Project Book 2. Review the Design Considerations Checklist and continue to refer to it throughout the development process. 3. Understand where design fits in the development timeline 4. Obtain Professional Design Assistance at the Very Beginning 5. Analyze target occupants and establish resident-related design goals for the project 6. Analyze neighborhood context and establish community-related design goals for the project 7. Analyze the site to make sure it can physically accommodate the proposed project and provide easy access to the amenities and services its residents will need. 8. Begin Cost Analyses - Continue to Conduct Them Early and Often

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PREDEVELOPMENT PHASE		
<i>What goes on in the development process</i>	<i>What goes on in the design process</i>	<i>What to do to ensure a well designed project</i>
<ul style="list-style-type: none"> • Apply for predevelopment funds. • Conduct market study. • Identify governmental/regulatory requirements. • Select project team and define scope of work for each member. • Review development concept with potential occupants, community groups, maintenance personnel, and other stakeholders and modify as appropriate. • Identify sources of financing. • Negotiate tentative or conditional financing commitments. • Test cost assumptions. • Obtain site control. • Develop feasibility study. <ul style="list-style-type: none"> ➢ Outcome: analysis of all assumptions regarding market, site, operation pro forma, development pro forma, financial requirements, financing, team and roles, including suggested modifications for the concept to be feasible. 	<ul style="list-style-type: none"> • Pre-Design Phase - Activities May Include: <ul style="list-style-type: none"> ➢ Existing Facilities Surveys • Site Analysis Phase - Activities May Include: <ul style="list-style-type: none"> ➢ Site Development Planning ➢ Detailed Site Utilization Studies ➢ On-Site Utility Studies ➢ Zoning Processing Assistance • Early Schematic Design Phase - Activities May Include <ul style="list-style-type: none"> ➢ Architectural Design ➢ Landscape Design 	<p>9. Assemble the right project design team</p> <p>10. Develop a minimum of 3 alternative site plan concepts for the project.</p> <p>11. Use the Design Considerations Checklist to guide the design process.</p> <p>12. Use the Operations & Maintenance Considerations Checklist to reality check the design process.</p>

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DEVELOPMENT PHASE		
<i>What goes on in the development process</i>	<i>What goes on in the design process</i>	<i>What to do to ensure a well designed project</i>
<ul style="list-style-type: none"> • Ongoing consultation between project team and the community. • Prepare and submit financing/loan application. • Secure permanent financing. • Acquire property. • Secure construction financing. • Solicit and review construction bids. • Obtain planning approvals, environmental approvals, if required. • Obtain building and other permits as required. <ul style="list-style-type: none"> ➤ Outcome: all elements of project made definite. Letters of commitment, contracts and loan documents binding all participants to the specific elements of the deal are put in place. 	<ul style="list-style-type: none"> • Later Schematic Design Phase - Activities May Include: <ul style="list-style-type: none"> ➤ Architectural Design ➤ Structural Design ➤ Mechanical Design ➤ Electrical Design ➤ Civil Design ➤ Landscape Design ➤ Interior Design ➤ Materials Research • Design Development Phase – Activities May Include <ul style="list-style-type: none"> ➤ Architectural Design ➤ Structural Design ➤ Mechanical Design ➤ Electrical Design ➤ Civil Design ➤ Landscape Design ➤ Interior Design ➤ Materials Research • Contract Documents Phase - Activities May Include <ul style="list-style-type: none"> ➤ Architectural Design ➤ Structural Design ➤ Mechanical Design ➤ Electrical Design ➤ Civil Design ➤ Landscape Design ➤ Interior Design ➤ Materials Research • Bidding or Negotiations Phase - Activities May Include <ul style="list-style-type: none"> ➤ Bidding Materials ➤ Bidding/Negotiation ➤ Analysis of Alternates/Substitutions ➤ Bid Evaluation ➤ Contract Award 	<p>13. Identify and prioritize the key design components of the project - those that will do the most to meet user needs, respond to the context and enhance the neighborhood.</p> <p>14. Stress the project's design quality in all funding applications.</p> <p>15. Identify and prioritize the key construction materials and systems for the project – those which are most critical to making the project "built to last."</p> <p>16. Identify and prioritize the key finishes and hardware for the project - those which are most critical to making the project "built to last."</p> <p>17. Monitor bids and review any material, system, finish or hardware substitutions to ensure that design objectives, especially the "built to last" goal, are not compromised.</p>

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CONSTRUCTION PHASE		
<i>What goes on in the development process</i>	<i>What goes on in the design process</i>	<i>What to do to ensure a well designed project</i>
<ul style="list-style-type: none"> • Award construction contract(s). • Initiate construction. • Manage change orders. • Negotiate certificate of substantial completion. • Initiate marketing and lease-up, including outreach within the community. • Manage construction close out. • Conduct open house for community participants, press, etc.. <ul style="list-style-type: none"> ➤ Outcome: completely built, leased/sold building, passing all inspections. 	<ul style="list-style-type: none"> • Contract administration Phase <ul style="list-style-type: none"> ➤ Submittal services ➤ Observation services ➤ Project Representation ➤ Testing and Inspection ➤ Administration ➤ Supplemental ➤ Documentation ➤ Quotation ➤ Requests/Change Orders ➤ Contract Cost Accounting ➤ Project Closeout 	<p>18. Monitor construction to ensure that all key design, construction and finish goals are being met.</p>

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OPERATION PHASE		
<i>What goes on in the development process</i>	<i>What goes on in the design process</i>	<i>What to do to ensure a well designed project</i>
<ul style="list-style-type: none"> • Staff up. • Occupy. • Provide services. • Operate. • Continue communication with community. ➤ Outcome: effectively rented/sold project meeting financial and other project goals. 	<ul style="list-style-type: none"> • Post Contract Phase - Activities May Include <ul style="list-style-type: none"> ➤ Maintenance and operational programming ➤ Start-up assistance ➤ Record drawing ➤ Warranty review ➤ Post occupancy evaluation 	<ul style="list-style-type: none"> 19. Create an operation and maintenance manual for the project. 20. Complete Project Book