



Project Book

A *Design-focused Workbook*
to Accompany the
AFFORDABLE HOUSING DESIGN ADVISOR

Project Name:

A new tool
to bring
the power
of design to
affordable
housing

The Design Advisor and the Project Book were developed by the U.S. Department of Housing and Urban Development, in cooperation with:

THE AMERICAN INSTITUTE OF ARCHITECTS • THE ENTERPRISE FOUNDATION
THE FEDERAL HOME LOAN BANK OF BOSTON • THE LOCAL INITIATIVES SUPPORT CORPORATION
THE NATIONAL CONGRESS FOR COMMUNITY ECONOMIC DEVELOPMENT
THE NEIGHBORHOOD REINVESTMENT CORPORATION



Foreword

Decent, affordable housing is critical to the social and economic well-being of this country. Need for such housing continues to far outstrip demand, and those projects that do get built suffer from severe cost constraints. Quality design – too often considered an expensive amenity, rather than a cost-effective necessity – is usually one of the first components to be cut from a project in the name of cost containment. The result is a country dotted with projects that meet minimal shelter requirements but fall far short of the well-planned, well-designed and well-landscaped environments that we usually associate with quality housing.

There is a clear need within the affordable housing community for straightforward, easy to use guidance on how to achieve cost-effective design excellence. HUD recognized this need and has created the Affordable Housing Design Advisor in response.

The Affordable Housing Design Advisor is a new, CD-ROM based tool designed to help the developers, sponsors and users of affordable housing understand what constitutes quality design, why it is worth striving for, and how to achieve it in their own projects. HUD's objective is to dramatically increase the "design literacy" of the many non-designers whose activities are central to affordable housing production.

The Design Advisor is organized into three core content areas:

1. What is Good Design?
2. Why is Design Important?
3. How Can I Get A Well Designed Project?

Each area provides plain English, action-oriented guidance complemented by case study examples of successful projects and strategies. Of particular note are the "20 Steps to Design Quality" which provide clear direction on how the process of delivering an affordable housing project unfolds and where design considerations can and must fit in. This step-by-step guidance also forms the basis of the "Project Book," a 100 page, design-focused workbook which accompanies the Design Advisor CD-ROM.

HUD strongly believes that better design can make a difference in affordable housing and that quality design will: increase the economic viability of developments, improve the quality of life for residents, and enhance the vitality of communities. The Affordable Housing Design Advisor is a valuable new tool that will help the many non-designers who produce and deliver affordable housing in the United States achieve these objectives.

Susan M. Wachter
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Additional Resources on the Design Advisor CD-ROM

Activity-Based Design Overview
AIA Documents Overview
Community Design Centers Overview
Design Considerations Checklist - Illustrated Version
Design Phase Definitions
Development Process Overview
Dwelling Types Overview
Gallery of High Quality Affordable Homes
Materials Handbook
Richmond, Virginia, Community Input Package
Sample Version B-141 Contract Document

Introducing the Project Book

The Project Book is a design-focused workbook that has been developed to help guide decision-making over the course of an affordable housing development project. It is intended to be used as a field manual to help structure and record key design decisions as they are made.

The Project Book is unique in that it is designed to be used interactively with the Affordable Housing Design Advisor, an electronic tool containing a wealth of detailed resources, links, illustrations and case studies which complement and expand on the information contained in the printed workbook.

Using the Project Book

The Project Book contains 20 individual chapters, each of which focuses on a specific set of actions that will help bring better design to an affordable housing development project. These sets of actions or “steps” are designed to be undertaken in sequence, beginning as early as possible in the Concept phase of development. (For a matrix indicating precisely when each step should be undertaken over the course of the development process, see Step 3.)

Most of the steps are accompanied by individual forms or checklists to help guide the actions called for in that particular step. The steps and their accompanying forms can be printed out individually, in groups or all at once. (See the Design Advisor, Step 1, for further information.)

As each form or checklist is completed, you can record the date of completion on the Master Checklist at the front of the Project Book. This will let you know where you are in the process and what comes next.

At every step it will be useful to consult the Affordable Housing Design Advisor for additional information. In particular, the Gallery and the Design Considerations Checklist should be visited and revisited for ideas and inspiration. Likewise the various tools and resources in the Advisor, including links to outside organizations and web sites, should be reviewed and used to help complete each step.

Systematic use of the Project Book, coupled with frequent consultation of the Design Advisor, will help ensure that your affordable housing development strives for and achieves the highest levels of design quality.

Master Design Checklist

STEP	ACTION	DATE COMPLETED
1. Start Project Book	Manual Printed Out and Inserted in Notebook	
2. Review Advisor Resources	Design Advisor Steps, Gallery, and Design Considerations Checklist Reviewed	
3. Understand Design Timeline	Design Development Matrix Reviewed	
	Design Phase Definitions Reviewed	
4. Obtain Professional Design Assistance	Community Design Center Contacted	
	Professional Design Assistance Obtained	
5. Establish Design Goals for Occupants	Comparable Projects Analyzed	
	Relevant Guidelines Assembled	
	User Activity Checklist Completed	
	Short Statement of Resident-related Design Goals Completed	
6. Establish Design Goals for Community	Neighborhood Context Analysis Worksheet Completed	
	Short Statement of Community-related Design Goals Completed	
7. Test the Site	Access Services Checklist(s) Completed	
	Site Suitability Test(s) Completed	
8. Begin Cost Analyses	Cost Analyses Completed:	
	at completion of site evaluation	
	at completion of early schematic design	
	at completion of late schematic design	
	at completion late schematic redesign	
	at completion of design development	
	at completion of contract documents	
during bidding		
9. Assemble Project Design Team	How to Select the Right Project Architect Guidelines Reviewed	
	Architect Selected and Design Team Assembled	

STEP	ACTION	DATE COMPLETED
10. Develop 3 Site Plans	3 Alternative Site Plans Developed and Reviewed	
	Final Site Plan Selected	
11. Use Design Checklist	Design Considerations Checklist Consulted During Early Schematics	
	Design Considerations Checklist Consulted During Late Schematics	
12. Use O&M Checklist	O&M Checklist Reviewed and Filled Out: at completion of schematic design	
	at completion of design development	
	at completion of contract documents	
	during early phase of construction	
	when construction is 85% complete	
13. Prioritize Design Components	Prioritized List of Key Design Components Completed	
14. Emphasize Design in Funding Applications	Section of Funding Application(s) Stressing Design Quality Completed and Submitted	
15. Prioritize Construction Systems	Prioritized List of Key Construction Materials and Systems Completed	
16. Prioritize Finishes and Hardware	Prioritized List of Key Finishes and Hardware Completed	
17. Monitor Bids	List of Key Bid Substitutions and their Impacts on Design Quality Completed	
18. Monitor Construction	List of Key Construction Substitutions and their Impacts on Design Quality Completed	
19. Create O&M Manual	O&M Manual Completed	
20. Complete Project Book	Project Manual Completed	