

## Step 9. Assemble the Right Project Design Team

### Why is this important?

Providing affordable housing is different from most other forms of real estate development. The process typically involves community and resident participation in ways that for-profit developments do not. It can also be highly politicized, especially if NIMBY (“not in my back yard”) attitudes are present. Sites can also be problematic. Regulations can be tortuous. And budgets are always too low.

To deal with all these factors and still hold on to and deliver design quality requires a special type of design team:

- one that understands the peculiar constraints of affordable housing development;
- one that has proven that it can work well within these constraints and still deliver design quality;
- one that can work well with, and accept input from, people in the community where the project will be built;
- and, perhaps most important, one that understands costs and how to create quality projects within tight budgets.

Assembling a team with substantial experience in – and a strong commitment to – delivering high quality affordable housing will take a great deal of pressure off the developer, making the entire development process easier and more successful. Not doing so – i.e. assembling a team without adequate experience – can have the opposite effect, putting extra burdens on the developer and potentially jeopardizing both the design and the long term viability of a project.

### When should I do this?

As early in the process as possible, budget permitting, but no later than the first stages of Predevelopment. (See the **Design/Development Matrix**.)

Special Note: The Design Advisor strongly recommends that any developer obtain professional design assistance as early as possible in the development process (see **Step 4**). This early assistance is distinct and separate from the services that will be rendered by the project design team. The project team is usually selected later in the development process, may or may not include the same individuals or firms providing early assistance, and is subject to different contracting procedures. Step 9 is focused solely on how to assemble the right project design team. For information on obtaining early professional design assistance see **Step 4**.

### Who should do this?

The owner/developer with input from the “design committee,” if one has been established.

### What should be done?

- Select the right architect.
  - The design team for a project may include a variety of professionals, including: an architect, a landscape architect, civil and structural, electrical and mechanical engineers.
  - In most instances the architect will be the leader, coordinating the activities of the other members of the team and acting as the owner’s point of contact.
  - Selecting the right architect or architecture firm is therefore the critical step to assembling the right team.
  
- Print the **How to Select the Right Project Architect Guidelines** and add them to the Project Book. Use the guidelines, and the accompanying **Example Criteria for Selecting an Architect** to help guide your selection process.
  
- Make sure a property manager is part of the design team from the beginning.
  - A common problem in affordable housing projects is that key components that impact how the project is operated and maintained are poorly designed or left out altogether.
  - Exterior hose bibs are a good, basic example: if you have them, its easy to clean exterior surfaces of the property and water any plantings; if you don’t – and they’re easy to overlook - it’s almost impossible to do these simple tasks. You must either make some other arrangement or, more likely, add them back into the project after the design is substantially complete, creating additional delay and expense.
  - Such problems can be avoided if the people ultimately responsible for operating the project – usually the property managers – are brought into the process early as advisors to the design team. In this capacity they can provide periodic reviews of the design to ensure that essential operation and maintenance components are considered and “designed in” from the beginning.

### How can doing this help me move my project forward?

- Hiring the right design team, with a proven track record in the type of project you are trying to develop, will make all future stages of the development process easier. In addition, the right design team will add immediate credibility to the project.
- Making the property manager part of the team also adds credibility, indicating that the developer understands the value of creating a project that is easy to operate and maintain.

### Additional resources

- The American Institute of Architects – [www.aiaonline.com](http://www.aiaonline.com)  
especially the Center for Livable Communities, the Housing Professional Interest Area, and the directory of local AIA chapters
- The Association for Community Design – [www.communitydesign.org](http://www.communitydesign.org)

## HOW TO SELECT THE RIGHT PROJECT ARCHITECT

Selecting the right project architect is a multi-step process which begins with establishing evaluation criteria, proceeds through interviews and proposals, and ends with a contract. The basic phases are described here.

Using the descriptions as a base, you can develop a set of steps that follows this general outline but responds more precisely to your specific circumstances and needs. The important thing is to formalize the process in some way so that it proceeds systematically and remains focused on selecting the best architect or architecture firm possible for your project.

### Step 1. Establish Evaluation Criteria

- These will be the criteria you will use to evaluate both general information on an architect's background and experience, as well as the specific proposal developed for your project.
- The basic criteria should be established before prospective architects are contacted, but they can, and probably will, be modified as the selection process proceeds.

*Example evaluation criteria are provided below.*

### Step 2. Identify Prospective Architects

- Sources
  - Similar projects in the area.
  - Other affordable housing providers/developers.
  - Local community design assistance centers.
  - The local chapter of the American Institute of Architects.

### Step 3. Contact Architects, Obtain Qualifications Information, Set Up Interviews

- Make evaluation criteria available so architects can send in appropriate background materials on experience and expertise.

### Step 4. Review qualifications material and develop short list (3-5 firms).

### Step 4. Conduct Interviews

- Use evaluation criteria to guide process and develop preliminary ratings.
- Be sure to interview the person(s) from the firm that you will actually be working with.

### Step 5. Request Written Proposals

Step 6. Evaluate Proposals and Make Qualifications Based Selection

- Use evaluation criteria

Step 7. Negotiate Contract

- Begin negotiations with the highest ranked firm based on qualifications. If negotiations fail, go on to the next highest ranked firm.  
(See the *AIA Documents Overview* in the Design Advisor “Tools” section for a review of basic owner/architect contract agreements.)

Step 8. Consider a Mentor

- It may turn out that the architects in your area simply can’t satisfy all the evaluation criteria you develop. Affordable housing is a specialized field of design and experience is critical. Such experience is not often easy to come by.
- You may, for example, find several firms with knowledge of your local construction and regulatory situation, but with only limited project experience—one rowhouse project for families when you’re developing a courtyard project for the elderly.
- Alternatively, it may turn out that the most enthusiastic architects willing to take on your project are inexperienced—their hearts are in the right place, but they lack the management experience to bring a complicated project in on time and within budget.
- In these cases, it may make sense to consider hiring an individual or firm with a great deal of experience to act as a mentor to the architect you choose. There are relatively few such firms in the U.S., so the odds are the one you select will not be local. The expense will therefore include travel to your location plus a few day’s of the architect’s time—on site and via phone and fax.
- While these expenses are “extra” to the project, they will pay themselves back many times over in better design and project management.
- To find appropriate mentors you can contact the architects for the projects mentioned in the Design Advisor. You can also contact your local chapter of the American Institute of Architects or the Center for Livable Communities at the AIA’s national headquarters ([www.aiaonline.com](http://www.aiaonline.com)). The Association for Community Design ([www.communitydesign.org/Designc.htm](http://www.communitydesign.org/Designc.htm)) is another resource.

## Example Criteria for Selecting an Architect

### Experience with similar projects

- Your architect should have created well-designed housing (at least 3 projects) of similar type, size, level of complexity and occupancy as the project you are developing.
- These “comparable” projects should have been brought in on time and on budget.
- You should be able to see pictures of these projects and to contact the owners.
- Ideally, you should be able to visit one or more of the projects.
- It can be especially useful to visit projects that have been occupied for more than two years.

### Design quality of comparable projects.

- The architect’s comparable projects should clearly demonstrate that they:  
Meet User Needs, Enhance their Neighborhoods, Understand and Respond to their Contexts, and are Built to Last

### Accuracy of Cost Estimates on Comparable Projects

- The architect’s cost estimates on his/her comparable projects should have been accurate.
- Project owners should be contacted to confirm this and review the entire cost/budget process for that project to ensure that it went smoothly

### Ability to work well with the community

- Affordable housing is unique in that it routinely involves the community—surrounding neighbors and future residents—in the design/development process.
- Prospective architects should have demonstrated experience in this area and should indicate how they involve the community in the process of making design decisions.

### Ability to work well with you

- You should feel comfortable with your architect and confident that he/she can hear and understand your needs and communicate clearly back to you.

### Appreciation of the demands imposed during the affordable housing development process

- Prospective architects must understand how the development process works in affordable housing.
- More importantly, they must understand that this complex and difficult process may put extra demands upon them—demands not normally encountered in other types of development.
- Prospective architects must be willing to meet these demands as part of their commitment to providing high quality affordable housing.

Experience with applicable funding programs

- Prospective architects should understand the structure, requirements, time tables and compliance procedures of the funding programs that will be used to finance the project.

Experience in the local construction and regulatory environment

- Because time and budgets are often very tight on affordable housing projects, the ability to effectively navigate through local regulations and to get accurate cost estimates within the local construction market becomes critical.
- Prospective architects—or members of their proposed team—should have demonstrated experience and expertise in these areas.
- Experience with local contractors is also desirable.

Technical knowledge of construction

- Because costs are typically so tight on affordable housing projects, the architect must have a firm understanding of construction, not only to create accurate estimates during design, but also to help control costs and quality during bidding and, particularly, during construction.
- Prospective architects—or members of their proposed team—should have demonstrated expertise in construction cost estimating and construction administration.
- Performance on comparable projects should be examined by contacting the owners.

References

- References should be from previous projects which are comparable to the one under development.

Enthusiasm

- Prospective architects should be excited and enthusiastic about your project and committed to working with you, the occupants and the community to make it an example of the highest design quality.