Category 1: Pre-Design

PROGRAMMING
- Assess the client's needs, opportunities, and constraints
- Develop and/or review a program with the client
- Develop a vision and goals for the project
- Develop or review client's design standards and guidelines
- Establish sustainability goals for the project
- Define the scope of the pre-design services

SITE AND BUILDING ANALYSIS
- Develop or review master plan
- Establish requirements of site survey(s)
- Review site survey(s)
- Review geotechnical and hydrological conditions
- Evaluate and compare alternative sites
- Perform site analysis
- Assess environmental, social, and economic conditions related to project
- Document and evaluate existing conditions

PROJECT COST AND FEASIBILITY
- Perform or review a feasibility study to determine the cost and/or technical advisability of a proposed project
- Establish preliminary project scope, budget, and schedule

PLANNING AND ZONING REGULATION
- Identify requirements of regulatory agencies
- Prepare and present submittals for governmental approval
Category 2 : Design

☐ SCHEMATIC DESIGN
  □ Develop design concepts, including site design
  □ Prepare schematic design documents
  □ Apply sustainable design principles
  □ Apply historic preservation principles
  □ Prepare presentation materials (e.g., models, renderings, drawings)
  □ Develop project phasing plans

☐ ENGINEERING SYSTEMS
  □ Analyze and design basic structural elements and systems
  □ Coordinate building systems (e.g., structural, mechanical, electrical, fire safety, security, telecommunications/data) and reconcile systems’ conflicts
  □ Apply sustainable design principles

☐ CONSTRUCTION COST
  □ Prepare and/or evaluate estimates of probable construction costs
  □ Perform value engineering of selected building elements
  □ Perform life cycle cost analysis of selected building elements

☐ CODES AND REGULATIONS
  □ Perform code analyses (e.g., building, energy, accessibility)
  □ Review project with code officials
  □ Submit documents to approval agencies and obtain approvals

☐ DESIGN DEVELOPMENT
  □ Prepare design development documents
  □ Investigate and select building systems and materials
  □ Meet with client to refine design and obtain approvals
  □ Conduct or respond to a constructability review
  □ Apply sustainable design principles

☐ CONSTRUCTION DOCUMENTS
  □ Prepare construction documents
  □ Coordinate construction documents (e.g., architectural, structural, mechanical, civil, electrical)
  □ Conduct quality control review of project documents
  □ Apply sustainable design principles

☐ MATERIAL SELECTION AND SPECIFICATION
  □ Prepare specifications based on performance criteria
  □ Research, select, and specify materials
Category 3: Project Management

**BIDDING AND CONTRACT NEGOTIATION**
- Conduct or participate in bidding/negotiating phase
- Evaluate product and material substitutions
- Prepare bid documents including addenda

**CONSTRUCTION ADMINISTRATION**
- Respond to Requests for Information (RFI)
- Issue Architect’s Supplemental Instructions (ASI)
- Process shop drawings and submittals
- Process Change Orders
- Review and certify contractor’s application for payment
- Review material test reports
- Record changes to the contract documents
- Provide substantial and final completion services

**CONSTRUCTION PHASE: OBSERVATION**
- Conduct on-site observations
- Document and communicate status to owner and constructor
- Resolve constructability issues

**GENERAL PROJECT MANAGEMENT**
- Prepare and manage design contracts (owner/architect)
- Prepare and execute professional services contracts (architect/consultant)
- Attend, conduct, and record meetings throughout all phases
- Select, manage, and coordinate consultants
- Partner with the owner’s project delivery team
- Prepare and manage design team schedule and budget (consultant and staff costs)
- Obtain client authorization to proceed per contract phases
- Present at public hearings
- Document project status and progress
- Monitor project construction costs
- Prepare owner/contractor agreement
- Conduct post-occupancy evaluation
- Identify the project design team members and their required scope of services, roles, and responsibilities (e.g., architects, engineers, specialty consultants)
- Identify the project delivery team’s roles and responsibilities (e.g., owner, architect, contractor, program manager)
- Identify project delivery method
Category 4: Practice Management

**BUSINESS OPERATIONS**
- Obtain and maintain professional and business licenses
- Manage project revenues and expenses
- Calculate hourly billing rates
- Negotiate and establish fees for basic and additional services and reimbursable expenses
- Invoice for services rendered and reimbursable expenses
- Develop and manage positive client relationships

**LEDERSHIP AND SERVICE**
- Develop leadership skills to enable successful practice
- Identify and articulate leadership traits required to maintain a successful and healthy office environment in an architecture firm
- Contribute your talents in a community-based organization to improve the quality of life