

# Design Project Scope

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Define the parameters of the project and map it recording what is existing.

Initially develop a form for the brief taking. It should follow within the parameters listed below. (Down load this form from the site [The brief system form](#))

## 1 Define

- Date
- Client name
- Address
- Contact details including phone fax and email
- Define a budget
- Draft outline of design and documentation needed
- Estimation of fees and engagement letter
- Type of project
- Size of project
- Individual rooms to be developed
- Expected flow and arrangement from client
- Expected timing of project
- Particular tastes colours, other consultants needed, permission letters to research relevant records and plans
- Give the project a number and start a file
- Confirm consents required
- Type of contract required to confirm timing
- Legal documents, titles, existing plans, building owner details

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## 2 Map the Project

- Identify the site and project by number.
- Record date and time started.
- Freehand sketch the rooms to be measured in plan elevation and relevant details such as joinery and trim profiles (eg skirtings and architraves) and the basic positions of services and existing heating and lighting.
- Photograph or video the rooms and details and sketch existing furniture and joinery to be used so that measurements can be taken for the planning.
- Measure the overall room and relative positions of the openings and features and add the measurement to the relevant areas of the freehand sketches. Measure all heights of the room and the furniture and opening sizes. (a lesson on this will soon be published online)
- Check planning details from local body and building laws. Ensure that your project complies or that consent can be obtained through due process if not, ensure that this is noted for your client's information.
- Use the measured sketch to draw a draft of the room's layout and elevations to create an accurate to scale drawing recording the room to industry standard. This should be to a scale of either 1:100 or 1: 50. Develop in pencil initially and then ink to full drafting standard if drawing manually. If with a cad system determine scale for the printer and then as per the cad system paying attention to ensuring the drawing has depth by accurate use of line weights.
- Print a copy of the draft.

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## 3 Resolve

**Quantify by listing. Justify with reasons. Clarify and record your design with your presentation. Confirm the design with the recipient.**

- List the spaces and requirements of each separately in two columns. Sketch on butter paper or similar the relationships required in a potato or bubble diagram.  
[New Home Planning](#)
- Reason, why you are making the design decisions that you do and note them down as margin notes beside the columns.
- Develop the requirements, sizes of each room in relation to and over the top of the measured draft, trying to incorporate as much of the existing as possible. Use standard drafting techniques to produce the sketch plan. During this design development start exploring appropriate colours and finishes for your scheme or theme.  
[How to Create a Colour scheme](#)
- Where you determine it necessary to demonstrate concepts, provide a wow factor or you want to provide a 3 dimensional explanation of the relationships, draw either in freehand or measured a single point perspective. For larger projects allow time as the resource.
- List each room and in separate columns. The walls, floor, ceiling, doors, trim, skirtings, hardware, light fittings and electrical switches and sockets, soft furnishings and furniture. Determine the type of finish, covering, hardware, light fitting, colours and textures by finding the predominant colour, texture, finish appropriate to your scheme and list in the schedule.
- Explore the various schemes available and investigate and list the alternatives to produce one main and one alternative colour/finishes board for the overall scheme in conjunction with the theme of your sketch plan.
- List all finishes in a separate schedule and a schedule per scheme.
- Contact client to arrange a time for your presentation. Allow for preparation, travel, the meeting and the subsequent follow up and recording of the meeting. Take copies of everything including colour photocopies or at the very least colour photographs of the colour and finishes boards. A copy of everything that you have presented should go with the minutes of the meeting for the file notes as well as a copy sent to your client after the meeting, this confirms the meeting and subsequent actions to be taken.
- Record the meeting formally no matter how well you know the client. Try and get your client to ask questions at the end of the presentation rather than during it. Make the presentation with the plan first, explaining your reasoning, the colour and finishes board next, explaining where and why, and the perspective last, which will help the client visualise and also explain most questions. Record all questions and answers. Finally give the client a written copy of your original brief method of design and design resolve. Get the presentation signed off if possible.
- From the notes taken and the formal minutes of the meeting consider what revisions are needed to meet the clients expectations. Note why you are changing and what you will do to achieve this. Get this back to the client as confirmation. (This is easier said than done however remember that usually only a very small percentage of clients are difficult. The majority approach a design project with a positive attitude). Use a two or three column list stating what is changing, why and how to resolve it.
- Go through process 7 again. When your client is satisfied ensure that this is recorded and that the colour board (or copy of it) and sketch plans are initialled as confirmation of the design being signed off. Copy these for your records and the clients.
- Confirm with local council planning bylaws again and refer to your building codes for the construction and design drawing details that follow the sketch plan.

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## 4 Specify

**Specify your design. Quantify and qualify with your documentation. Confirm with the recipients.**

- Now set up the documentation to demonstrate and accurately describe the complete contract to current industry standard or better. Remember the more detail, the fewer questions on site, and the more time you will save and the less interpretation by all involved. For most projects the following should be included:
- Site plan
- Floor plan
- Elevations
- Services plans, electrical, data, plumbing and drainage
- Reflected ceiling plan showing features and lighting
- Construction details for demolition, openings, joinery, cabinetry, bracing, structural and stairs. These will include dimensioned plans, elevations and cross sections.
- Complete the detail with finishing schedules (no matter how small the project) and then with a specification of works show the scope per trade. Refer to all current building standards and laws, the project preliminaries including timing and insurances and on site conditions and rules for working. Include noise, hot works and dangerous goods.
- Generic specifications are OK but you must refer to the laws, standards and conditions including (most of all) insurances. Confirm all laws standards and conditions with the local building authority or a building professional. If in doubt about insurances contact an industry professional such as a registered Architect or Quantity Surveyor or a reputable insurance broker or company.
- Once all documentation is finished it must be forwarded to the client for their approval and sign off once again. This will entail another meeting so allow the time to go through all documentation thoroughly.
- With this done, the documentation that you have prepared for construction, contract and council can be distributed to the respective parties including the council's building department and contractors for pricing.
- Documents are submitted for necessary building consents and documents are used to establish a contract in relation to current market conditions.

This is the final stage of the design process; the next stage is project management.