



What Can I Expect From My Architect?

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ASSUMPTIONS

- ☺ **This Training Is Not Legal Advice**
- ★ **The Basic Assumptions for the Project Are**
 - ★ **The Project Uses a General Contractor**
 - ★ **Unmodified Terms of a Standard Form Architect Agreement AIA B101 2017**
 - ★ **Consult With Your Attorney About Your Individual Project.**



HIRING AN ARCHITECT OR ENGINEER



HIRING AN ARCHITECT: PRE-BOND PLANNING



HIRING AN ARCHITECT PRE-BOND

- ☺ **No “Free” Services in Exchange for Future Projects.**
- ☺ **In the “Good Old Days” It Was Common To Get “Free” Services in Exchange for Future Work.**
- ☺ **Also, From the “Good Old Days”**
 - ☺ **Oh my Gosh! MY BUDGET!**
 - ☺ **YOU DESIGNED WHAT?**
 - ☺ **NOT MY RESPONSIBILITY!**





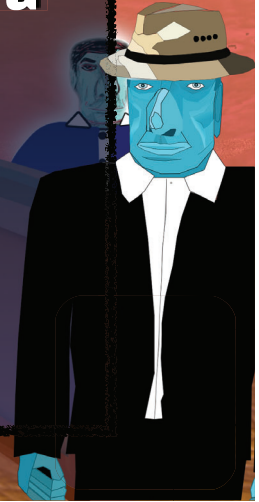
HIRING THE ENGINEER/ARCHITECT

▶ **Design Professional Procurement**

- 1** select the Most Highly Qualified Provider on the Basis of Demonstrated Competence and Qualifications (the **MQBDCQ**)
- 2** negotiate a Contract at a **Fair and Reasonable Price.**

HIRING THE ENGINEER/ARCHITECT

- ☹️ **CANNOT** Base the Award of a Contract for Professional Services on Competitive Bids;
- ☹️ **It Must Be Based on "Competence and Qualifications..."**



HIRING THE ENGINEER/ARCHITECT

- ☹️ **If You Can't Reach an Agreement With the Most Qualified Architect Then:**
 - ☹️ **Terminate Negotiations IN WRITING.**
 - ☹️ **Attempt To Negotiate a Contract With THE NEXT MOST QUALIFIED Provider at a Fair and Reasonable Price. (YOU CAN'T GO BACK)**
 - ☹️ **Repeat Until You Get a Satisfactory Agreement.**



HIRING AN ENGINEER/ARCHITECT

1!



HIRING AN ENGINEER/ARCHITECT

2!



THE BASIC SERVICES



THE BASIC SERVICES

ME,
ACTUALLY.

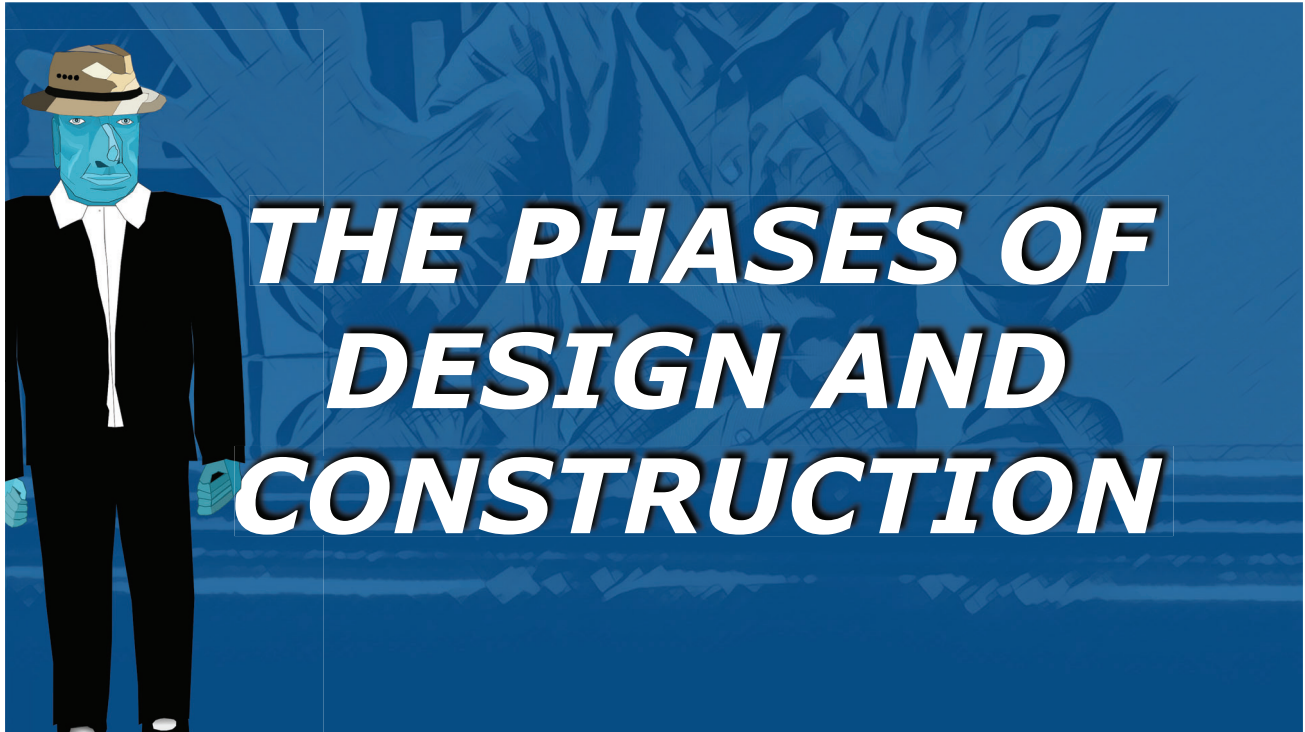
☺ **The Basic Services**

The **Architect** Provides
Structural, Mechanical, and
Electrical Engineering Services.

☺ **Additional Services**

- ★ Additional Engineers and Consultants
- ★ Programming
- ★ There Are Many Others





THE CONSTRUCTION PHASES

- ☺ **Schematic Design Phase**
- ☺ **Design Development Phase**
- ☺ **Construction Documents Phase**
- ☺ **Bidding and Negotiation Phase**
- ☺ **Construction Administration Phase**





INITIAL DUTIES UNDER STANDARD AIA CONTRACT LANGUAGE

INITIAL STEPS

- ☺ **Architect Reviews the Owner's Program.**
 - ★ **Here Is Where You Tell Them What You Want**
 - ★ **This Is Where You Give Them the **Educational Specifications** and **Long Range Facilities Plan****

INITIAL STEPS

☺ The Architect:

- ★ **Reviews Laws, Codes and Regulations;**
- ★ **Prepares the Schedule;**
- ★ **Prepares a Budget for the Cost of the Work;**
- ★ **Notifies the Owner of Program Inconsistencies;**



SCHEMATIC DESIGN PHASE



SCHEMATIC DESIGN PHASE

- ☺ If the **Owner** Approves the **Preliminary Design**, Then the **Architect** Will Prepare “the **Schematic Design Documents**.”
- ☺ **Schematic Design Documents** Consist of **Drawings**, a **Site Plan**, the **Preliminary Building Plans**, **Sections** and **Elevations**.
- ★ **Preliminary** Selections of **Major Building Systems** and **Construction Materials**.



SCHEMATIC DESIGN PHASE

- ☺ **BEFORE** Moving to the **Design Development Phase** The Board Approves:
 - ☺ **Schematic Design Documents;**
 - ☺ **Updated SCHEDULE;** and
 - ☺ **Updated Cost Estimate**





DESIGN DEVELOPMENT PHASE



DESIGN DEVELOPMENT PHASE

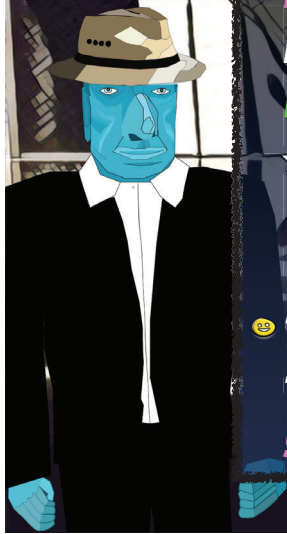
😊 **AFTER** District Approval of the **Schematic Design Documents**, the **Architect** Prepares the **Design Development Documents**.

DESIGN DEVELOPMENT PHASE

☺ **DESIGN DEVELOPMENT DOCUMENTS BUILD ON THE SCHEMATIC DESIGN DOCUMENTS.**

★ **THEY PROVIDE MORE DETAIL AND REFLECT THE OWNER'S DESIGN CHOICES.**

☺ **THEY ALSO OUTLINE SPECIFICATIONS THAT IDENTIFY MAJOR MATERIALS AND SYSTEMS.**



DESIGN DEVELOPMENT PHASE

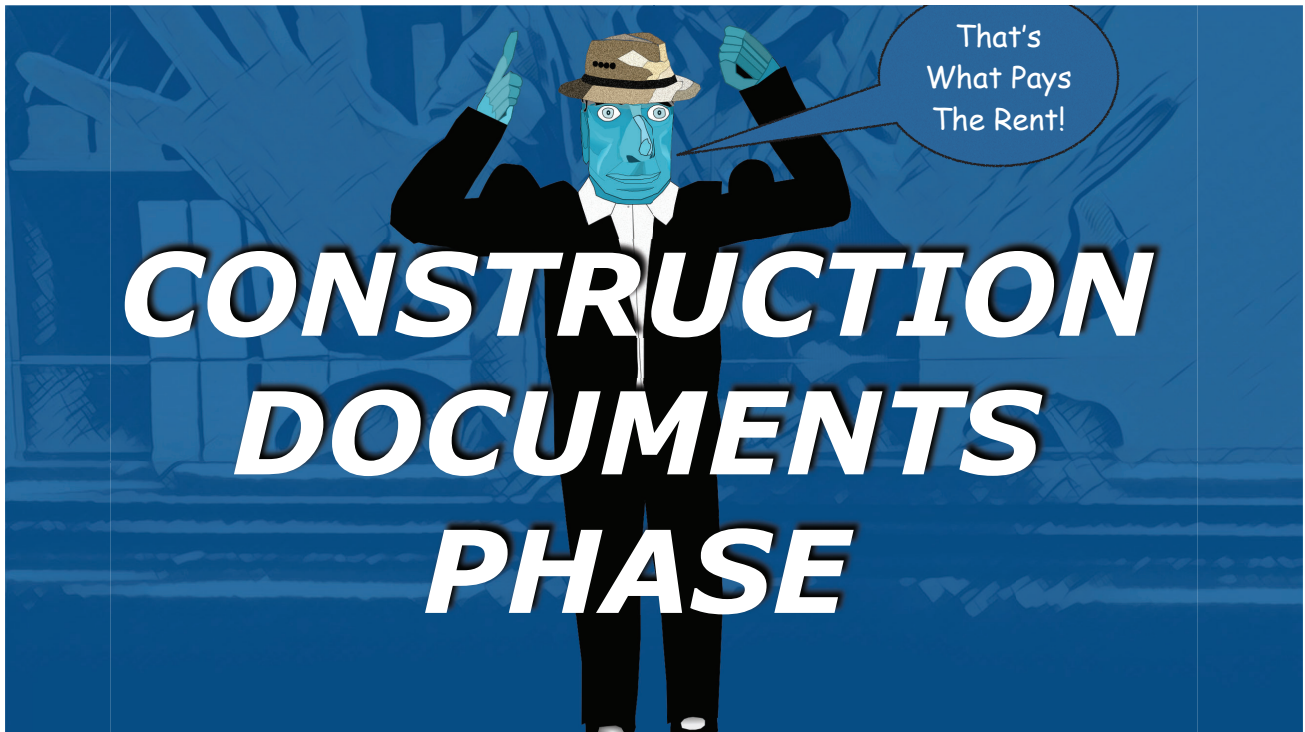
☺ **BEFORE** Moving to the **Construction Documents** Phase, the Board **Approves:**

☺ **Design Development Documents;**

☺ **The SCHEDULE; And**

☺ **UPDATED Cost Estimate**





CONSTRUCTION DOCUMENT PHASE

- ☺ Begins **After** Board Approval of the **Design Development Documents**.
- ★ These Are the **Bidding and Building Documents!**
- ★ **All** Design Choices Should Be Set **Before** This Phase Begins.
- ★ **Subsequent "Value Engineering"** Is **HIGHLY Suspect**.

CONSTRUCTION DOCUMENT PHASE

☺ The Architect:

- ★ Prepares Bidding Information;
- ★ Prepares the Contracts (Don't Let Them Do This);
- ★ Compiles a Project Manual;
- ★ Updates the Cost of the Work; and
- ★ Submits the Construction Documents and Revised Cost of the Work for Owner Approval.



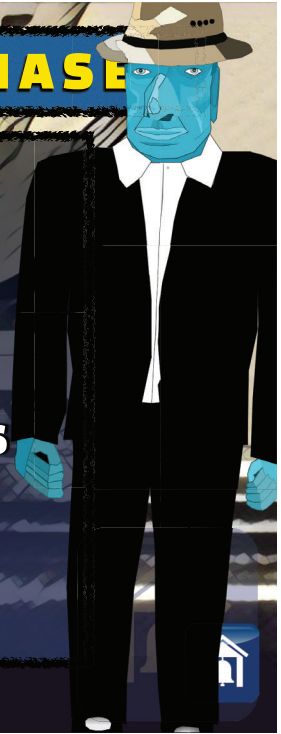
BIDDING AND NEGOTIATION PHASE



BIDDING AND NEGOTIATION PHASE

😊 During This Phase the **Architect:**

- ★ **Assists** the **Owner** With Obtaining Proposals
- ★ **Confirms** Responsiveness of the Proposals
- ★ **Helps** Determine the Successful Proposal



CONSTRUCTION ADMINISTRATION PHASE



CONSTRUCTION ADMINISTRATION PHASE

- ☺ **Administers** the Contract as Set Out in the “A201.”
- ☺ **Defects and Deficiencies in the WORK?!**
- ☺ **THE ARCHITECT’S DUTY IS TO OBSERVE AND REPORT**

CONSTRUCTION ADMINISTRATION PHASE

- ☺ **Evaluations** of the Work
 - ★ The **Architect** Is Required To **Visit the Site** at “**Appropriate Intervals.**”
 - ★ **IF YOU WANT MORE FREQUENT VISITS, PUT IT IN THE AGREEMENT**
 - ★ The **Architect** Must Report Their Findings to the **Owner.**

CONSTRUCTION ADMINISTRATION PHASE

😊 What if the **Architect** Observes That Something Was Done **Incorrectly?**

- ★ The **Architect** Can **Reject** the Work if It Doesn't Conform to the **Contract Documents.**
- ★ The **Architect** Can Also **Require Additional Testing**



CERTIFICATES FOR PAYMENT

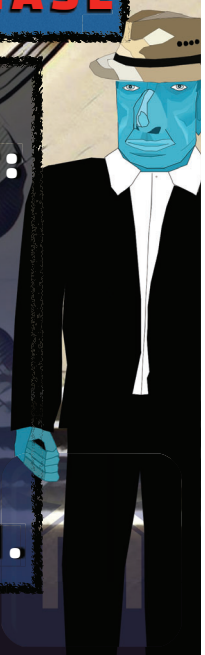
CONSTRUCTION ADMINISTRATION PHASE


- ☺ The **Architect** Needs To **Approve Pay Applications**.
- ☺ Point of **Conflict**: Discovery of **Hidden Defects**.
- ☺ The **Standard** Contracts Allow the **Architect To Take Action** but It Does **Not** Make the **Architect Responsible** for **Construction Defects**.



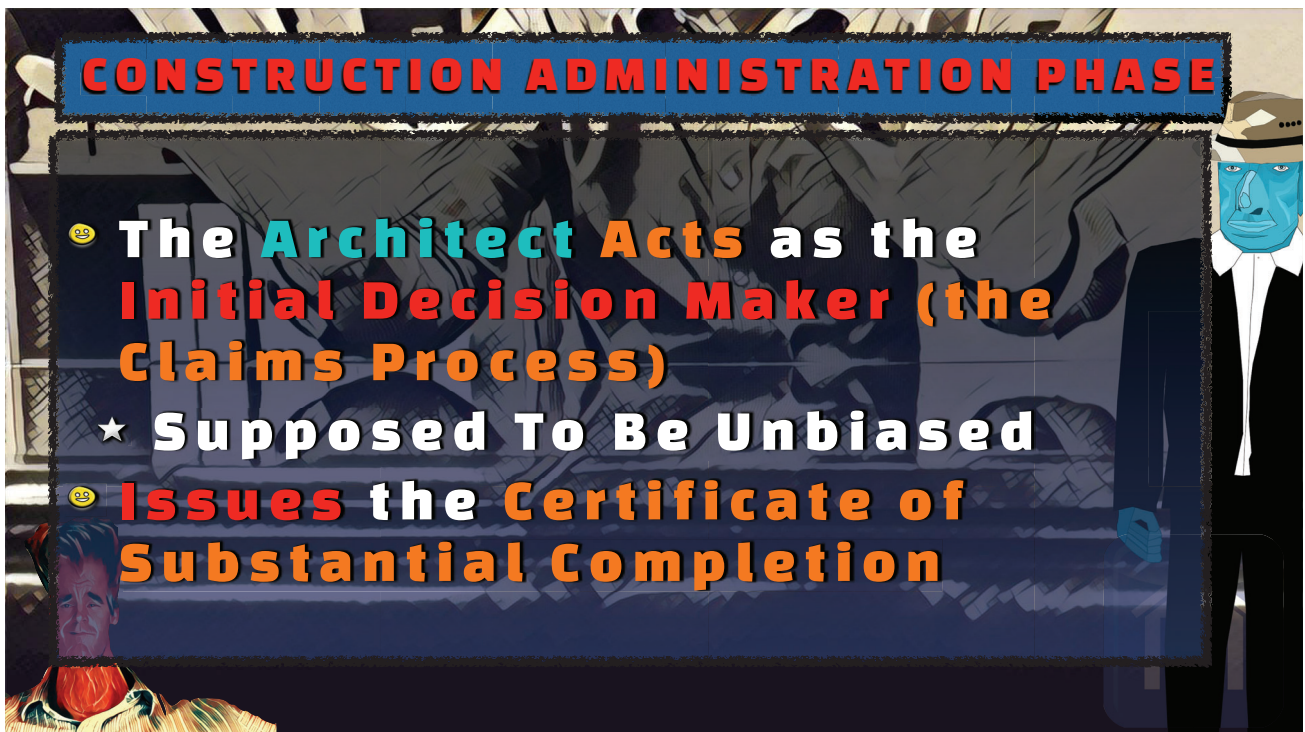
CONSTRUCTION ADMINISTRATION PHASE

- ☺ A **Certificate for Payment** Is **Not** a Representation That the Architect:
 - ☺ Has Made **Exhaustive or Continuous on-Site Inspections**;
or
 - ★ **Reviewed** Construction Means **Methods Etc**; or
 - ★ **Researched** How the Contractor Has Used Monies Previously Paid.



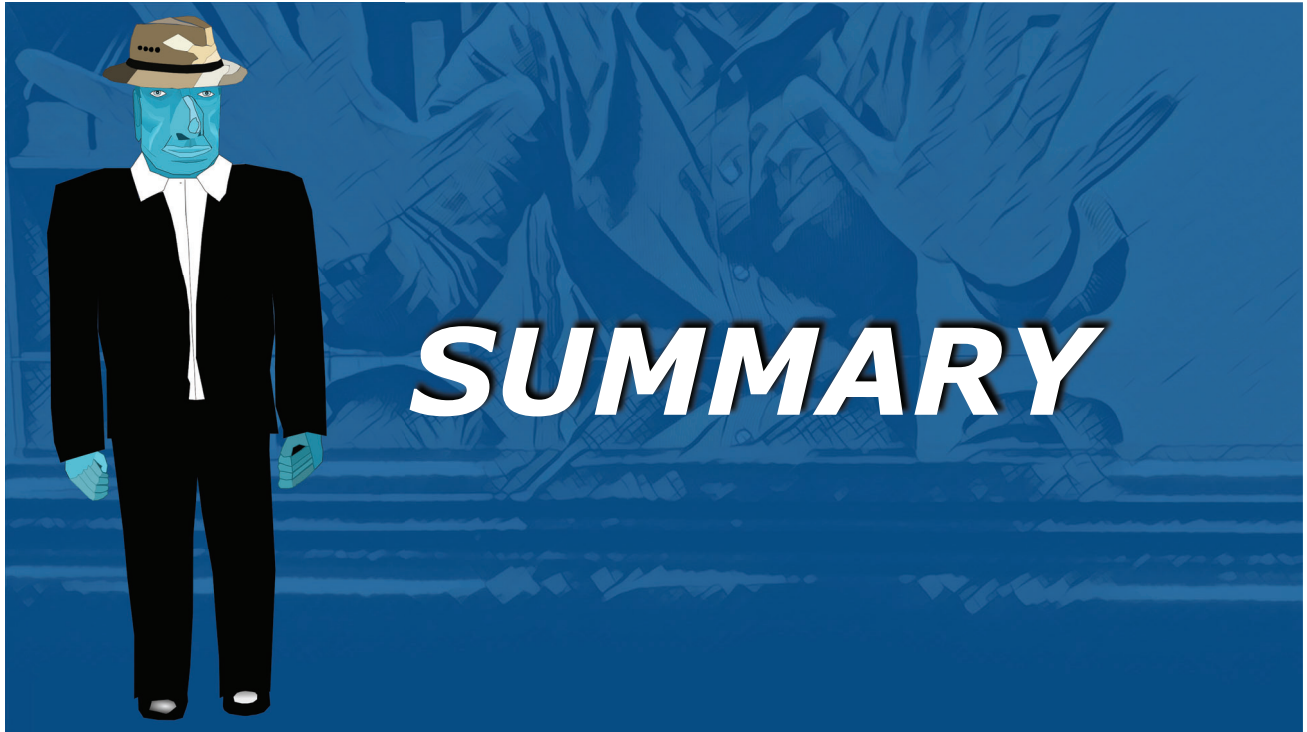


OTHER CONSTRUCTION PHASE DUTIES



CONSTRUCTION ADMINISTRATION PHASE

- ☺ **The Architect Acts as the Initial Decision Maker (the Claims Process)**
- ★ **Supposed To Be Unbiased**
- ☺ **Issues the Certificate of Substantial Completion**



SUMMARY

- 😊 **The Architect Is Selected Based on Demonstrated Competence and Qualifications**
- 😊 **Discuss Pricing Only After the Design Professional Is Determined To Be the Most Qualified Based on Demonstrated Competence and Qualifications.**

SUMMARY - OWNER APPROVALS

□ INITIAL PLANNING PHASE

- Budget
- Schedule

□ SCHEMATIC DESIGN

- Budget
- Schedule
- Basic Design

□ DESIGN DEVELOPMENT

- Budget
- Schedule
- Full Design

□ CONSTRUCTION DOCUMENTS (BEFORE GOING OUT TO BID)

- Budget
- Schedule
- Fully Detailed Design



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