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STARTING

an Interior Design Project

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Managing an interior design project requires as much creative thoughtfulness as the design itself, and the best projects begin with a carefully planned project



The thought of starting an interior project can be daunting; however, with a bit of strategic planning, a project can be launched smoothly and effectively. Whatever the scale of the project, four basic elements must be considered from the beginning:

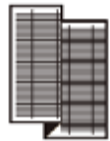
Interior Design Project ***Four Basic Elements***



Project Site



Program



Schedule



Budget



Project Site

In general, a client engages a designer once a site or space is in hand. It is then the designer's task to analyze the space to ensure that it will meet the client's needs. Sometimes, a client may not have a single space in mind, but rather a few options that the designer will test to ascertain which one best suits the client's needs. Both of these scenarios suggest that the client is working toward a particular program; however, sometimes the physical space generates the program. In this case, the designer's task is to decide the best layout for the space and design a program within those constraints.



Programming

Programming is the process of defining the needs of those who will use the space, in advance of creating the design. Whether for a home kitchen renovation or for a newly constructed restaurant, this exercise should evaluate the functional performance, opportunities, and constraints of the existing space. Furthermore, the program should articulate what spaces, features, or attributes must be added to improve functionality and give an appropriate and compelling character to a space. The programmatic goals should be precisely qualified in a brief, the written document that outlines all functional, dimensional, and relational requirements. This list of objectives will form the basis for evaluating design solutions in subsequent phases of the project.



Programming is critical to the design process because it is here that the client's problems and goals are clearly identified. Good communication is key to articulating the program and managing expectations for the design phase. A lack of understanding the goals at this stage may result in cost overruns during the construction phase or, even more detrimental, a project that does not meet the client's basic needs. Ideally, the program serves as a core map from which design objectives, spatial adjacencies, and building constraints are elaborated.

Programming Activities

Gathering Information	Analyzing Information	Documenting Information
<ul style="list-style-type: none"> ✓ Collect floor plans. ✓ Visit site with client. ✓ Report field observations. ✓ Determine client structure and end users (Who makes the decisions? Who uses the spaces?). ✓ Compile information on client (client's mission, structure of organization, future goals, etc.). ✓ Interview client representatives and end users. 	<ul style="list-style-type: none"> ✓ Analyze interview notes. ✓ Create bubble diagrams of ideal spatial relationships. ✓ Determine staff counts and future projections. ✓ Develop lists of type and quantity of spaces. ✓ Define specific needs within a given space (i.e., storage for a specific number of files). ✓ List issues that need clarification or resolution. 	<ul style="list-style-type: none"> ✓ Create bubble diagrams of ideal spatial relationships. ✓ Summarize program for current needs and future growth. ✓ Include meeting notes from interviews. ✓ Obtain client approval on program and projections. ✓ Compile report.

Schedule

An ideal project schedule specifies not only the designer's responsibilities, but also the important decisions to be made by the client, as well as the critical role of the contractor as a member of the project team. As a result, the schedule should address all of the project milestones, in the form of a checklist, and assign to a team member the primary responsibility for oversight. Schedules include, but are not limited to, establishing the timeframe for executing contracts and acquiring existing condition surveys; defining the length of design phases; receiving concept design and budget sign-off; bidding and negotiating with contractors; obtaining permits; defining construction duration; and fixing a move-in date.

Sample Schedule

	WEEK																															
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	32
CHECKLIST																																
Contract Negotiations																																
Programming / Pre-Design																																
Interior Survey																																
Presentation of Design Concepts																																
Approval of Design Concept																																
Schematic Design																																
Conceptual Price Estimate																																
Review and Approval of Budget Estimate																																
Design Development																																
Review and Approval / Design Sign-Off																																
Construction Documents																																
Bids and Negotiations																																
Award Contract																																
Acquisition of Permits																																
Mobilization of Site																																
Construction Administration																																
Installation of Furnishings																																

Budget

Establishing a project budget is crucial for streamlining the design process. It instantly communicates the scope of the work and the level of finishes. *Project budgets are divided into hard and soft costs.* For an interior project, **hard costs** cover the cost of construction and fixtures, furniture, and equipment (**FF&E**). A typical assumption for an FF&E budget is 10 percent of the overall construction cost. **Soft costs** include, but are not limited to, designer's fees, consultant's fees, project management fees, permitting fees, insurance, and project contingencies.

A designer's primary concern is to meet the budget for hard costs. To ensure that a budget is realistic, a conceptual pricing estimate should be conducted early in the process. For small projects, it may not be realistic to have an estimator or a contractor on board at the initial stage. Instead, the designer may be able to provide "ballpark" numbers based on their experience. The danger is that construction costs are extremely volatile and subject to change depending on many factors, such as inflation and shifting market conditions. So for early pricing studies or ballpark assumptions, it is important to include **contingencies** for unknown factors. There are several types of contingencies, whose percentages of the total estimate will change as the design develops.



Types of **Contingencies**

Design Contingencies

Money that is reserved for design elements that are not known during a pricing study. The earlier that a pricing estimate is completed, the higher the percentage for design contingencies should be. As the design is further documented, this percentage decreases—until the category disappears at the end of the construction documents. These contingencies typically range from 5 to 10 percent of the overall estimate.

Construction Contingencies

Money reserved for unknown conditions due to the renovation of existing buildings. These contingences can range from 5 to 15 percent of the overall estimate.

Owner Contingencies

Money an owner reserves for change orders once a project is in construction. Change orders typically occur due to a change in scope, schedule, or a combination of the two. These contingences can range from 5 to 15 percent depending on the condition of the existing building. Generally, the older the building, the more the owner should reserve for unforeseen situations.

Escalation

Money reserved for increased costs for materials and labor due to time lapses from the initial pricing study to actual construction. These contingences can range from 3 to 5 percent per year, from when the project was originally priced.

Scope of Project

As the design of a small project is further developed, it is important to work with a contractor who will estimate the project costs based on drawings and specifications that the designer provides. For small projects, estimates should not be based on square footage, but rather, should identify and price all construction materials and labor costs. For medium to large projects, either a cost estimator or a construction manager will prepare the budget. Cost estimators are hired exclusively to put together construction estimates. Construction managers are contractors/builders that are hired early in the design process to manage the cost of a project through the design phases.

Budget Formats

For small projects, budgets are typically itemized based on how a general contractor would ask a subcontractor to bid the job. The trades may be broken down in general categories such as carpentry, plumbing, electrical, plaster and paint, millwork, and so on. For medium to large projects, budgets should be formatted according to the **Construction Specification Institute's (CSI)** index, a standard index that breaks down construction costs by trade. This helps the designer evaluate where most of the construction costs are concentrated.

Sample Construction Specification Institute's (CSI) Index

Index No.	Divisions	Subdivisions	
01000	General Conditions		
02000	Site Work		
03000	Concrete		
04000	Masonry		
05000	Metals	5010	Metal Materials
		5030	Metal Finishes
		5700	Ornamental Metal
06000	Woods & Plastics	6200	Finish Carpentry
		6400	Architectural Woodwork
		6600	Plastic Fabrications
07000	Thermal and Moisture Protection		
08000	Doors and Windows	8100	Metal Doors and Frames
08200	Wood and Plastic Doors		
08250	Door Opening Assemblies		
08400	Entrance and Storefronts		
08500	Metal Windows		
08600	Wood and Plastic Windows		
08700	Hardware		
08800	Glazing		
09000	Finishes	09100	Metal Support Systems
		09200	Lath & Plaster
		09230	Aggregate Coatings
		09250	Gypsum Board
		09300	Tile
		09400	Terrazzo
		09500	Acoustical Treatment
		09540	Special Surfaces
		09550	Wood Flooring
		09600	Stone Flooring
		09630	Unit Masonry Flooring
		09650	Resilient Flooring
		09680	Carpet
		09700	Special Flooring
		09780	Floor Treatment
		09800	Special Coatings
		09900	Painting
		09950	Wall Coverings

Index No.	Divisions	Subdivisions	
10000	Specialties	10100	Chalkboards and Tackboards
		10260	Wall & Corner Guards
		10500	Lockers
		10600	Partitions
		10650	Operable Partitions
		10670	Storage Shelving
		10800	Toilet & Bath Accessories
		10900	Wardrobe & Closet Specialties
11000	Equipment		
12000	Furnishings	12050	Fabrics
		12100	Artwork
		12300	Manufactured Casework
		12500	Window Treatment
		12600	Furniture & Accessories
		12670	Rugs & Mats
		12700	Multiple Seating
		12800	Interior Plants & Planters
13000	Special Construction		
14000	Conveying Systems		
15000	Mechanical		
16000	Electrical	16500	Lighting
		16700	Communications
		16900	Controls

Project Management

The designer and client must reach a common understanding of the contracts, fees, and design process for a project to succeed. For large projects, a project manager will assume responsibility for coordinating these business aspects of the job. For smaller projects, the designer has both to design and to manage the project. Typically, management issues weigh heavily at the beginning of a project, but they must be attended to throughout to ensure that the fees, schedules, and agreements are all being met.

Contracts

The first step in embarking on a project is for the designer and client to sign a contract. The contract defines the scope, qualifications, assumptions, exclusions, duration, and terms of the project. Ideally, it is set up in a manner that separates the scope into specific design tasks, determining, for example, the number of meetings to be held or the number of renderings or sample boards to be provided. In addition to detailing the scope, the contract should include a list of qualifications, which are limitations placed on the scope. A typical qualification might be project fee. Including a list of assumptions will avoid miscommunication. It is equally important to list exclusions to the contract, such as “an interior survey is not in contract” or “furniture selections are not part of contract.” This will help to identify issues or consultants for which the designer is not responsible. The contract must also provide a written description or a graphic schedule that outlines the project timeline.

Terms of Agreement to Include in Every Contract

- ✓ Limitations of liability
- ✓ Payment terms
- ✓ Code interpretations and Building Code compliance
- ✓ Ownership of documents
- ✓ No consequential damages
- ✓ Termination or suspension
- ✓ Insurance and indemnification

Common Mistakes to Avoid When Establishing a Contract

- ✓ Not defining a detailed scope of work
- ✓ Starting before the contract is signed
- ✓ Not defining a method of compensation
- ✓ Not red-flagging additional services as they arise
- ✓ Not listing reimbursable items
- ✓ Not halting work when payments are overdue

Design Fees

When negotiating a fee, it is up to the designer and the client to agree on the fee structure. For most design disciplines, there is no such thing as “typical” or “standard” fees for design services, due to the vastly different nature of individual projects. A residential project, for instance, can range from a modest renovation to a new custom-tailored design, and the fee may be best structured on an hourly basis. At the other end of the spectrum, for a large commercial project, it would be reasonable to assume a fee based on the number of square feet (or meters). That said, most designers choose among several methods for structuring fees, either alone or in combination, and adjust them to suit a client’s particular needs.

Fee Structures

- ✔ Fixed Fee (or Flat Fee) - Specific sum that is based on human resources, hourly rates, and duration of phases for all services. Reimbursable expenses are eliminated from the fixed fee.
- ✔ Hourly Fee (or Time and Material) - Compensation for every hour spent by the designer on a project, based on a predetermined hourly rate. In addition to the hourly fee, materials (e.g., color copies, printing, samples) are also billed.
- ✔ Cost Plus - Fee based on the designer purchasing materials, furnishings, and services (e.g., carpentry, drapery workrooms, picture framing) and reselling them to the client at the designer’s cost, plus an additional specified percentage to compensate the designer for time and effort. Percentage of Construction Costs
- ✔ Percentage of Construction Costs - Fee structured on the overall cost of construction.
- ✔ Calculated Area Fee - Fee determined by multiplying the project area, generally in square feet (but in square meters for federal commissions), by an agreed-upon cost per square foot or meter. Typically, the larger the project becomes, the lower the cost per square foot (or meter).

Engaging Consultants

No set standards exist for engaging consultants for an interior project. Hiring a consultant will depend on the size, type, and scope of the project. For example, however important lighting is to a kitchen renovation, it may not be necessary to enlist a lighting designer, but their expertise is indispensable for an art gallery project. It is the designer's responsibility to make suggestions to the owner for hiring consultants.

Types of Consultants

Consultant	ID	A	Responsibilities
Acoustic Engineer	×	×	Design, detail, and specify construction methods for acoustic criteria.
Art Consultant	×		Recommend and install artworks.
Color Specialist	×	×	Recommend and specify paint scheme.
Fire Protection Engineer	×	×	Design fire sprinkler system and provide calculations for building officials.
Furniture Consultant	×	×	Recommend, select, and specify furniture, fixtures, and equipment.
Kitchen Consultant	×		Design and detail a custom kitchen.
Landscape Architect		×	Design ground plane and landscape components.
Lighting Consultant	×	×	Design and specify lighting and lighting controls.
Mechanical, Electrical, and Plumbing Engineers	×	×	Design and specify mechanical, electrical, and plumbing systems.
Media Consultant	×		Design and install audio-visual systems.
Signage/Wayfinding Consultant	×	×	Design and specify building signage.
Sustainability Consultant	×	×	Provide recommendations for integrating sustainable solutions.
Structural Engineer	×	×	Design and specify structural components of the project.

Design Phases

All practitioners must address the standard phases of the design process. The table below identifies the duration and goals for each phase of a small-to-medium-sized interior design project. Depending on the circumstances of a particular project, the timeline can vary greatly; however, the project goals should be adhered to for each design phase.

Programming	Conceptual Design	Documenting Information
<p>2 WEEKS</p> <ul style="list-style-type: none"> ✔ Negotiate a contract. ✔ Develop a project schedule. ✔ Survey and document existing conditions. ✔ Determine design objectives and spatial requirements. ✔ Document project goals. ✔ Identify additional consultants that may be required. 	<p>3 WEEKS</p> <ul style="list-style-type: none"> ✔ Prepare graphic materials to describe each design concept. ✔ Review design concepts with client. ✔ Identify life-safety and building code issues. ✔ Evaluate and select a design concept to be developed. 	<p>6 WEEKS</p> <ul style="list-style-type: none"> ✔ Develop the approved design concept. ✔ Prepare drawings, including plans, reflected ceiling plans, interior elevations. and details. ✔ Develop art, accessory, and graphic/signage programs. ✔ Prepare a list of materials and equipment for specification. ✔ Engage a contractor or estimator for preliminary pricing of design.

Construction Documents	Construction Administration
<p>8 WEEKS</p> <ul style="list-style-type: none"> ✓ Gain approval of scope based on pricing exercise. ✓ Prepare documents for construction. ✓ Identify and interview qualified contractors. ✓ Assist client with awarding contracts. ✓ Prepare specifications. 	<p>Duration of Construction</p> <ul style="list-style-type: none"> ✓ Confirm that building permits have been obtained. ✓ Review and approve shop drawings and samples. ✓ Conduct site visits. ✓ Oversee the installation of furnishings, fixtures, and equipment (FF&E). ✓ Prepare a punch list of pending construction deficiencies.

Project Phases Defined

Programming: Identification, analysis, and documentation of the client's needs and goals in a written document. This becomes the basis for evaluating design solutions in the subsequent phases.

Conceptual Design: Brainstorming phase of the design process, where many options are considered and evaluated. The goal is to gain client approval for a single design concept that will be further developed as the project progresses and to agree on a direction for the character and aesthetic intent of the project.

Design Development: Most design-intensive phase of a project, in which all design elements are developed, including the partition and furniture layout; wall, window, floor, and ceiling treatments; furnishings, fixtures, and millwork; color, finishes, and hardware; and lighting, electrical, and communication systems. The goal is to define and gain approval of all of the design recommendations.

Construction Documents: Preparation of working drawings and specifications that define the approved recommendations for non-load-bearing interior construction, materials, finishes, furnishings, fixtures, and equipment. At the end of this phase, the designer must communicate the design intent in an illustrated and written format for construction purposes.

Construction Administration: Administration of contract documents. Acting as the client's agent, the designer must approve shop drawings and regularly visit the site during construction to ensure that the project is being built according to the documents.