



Project Book

A *Design-focused Workbook*
to Accompany the
AFFORDABLE HOUSING DESIGN ADVISOR

Project Name:

A new tool
to bring
the power
of design to
affordable
housing

The Design Advisor and the Project Book were developed by the U.S. Department of Housing and Urban Development, in cooperation with:

THE AMERICAN INSTITUTE OF ARCHITECTS • THE ENTERPRISE FOUNDATION
THE FEDERAL HOME LOAN BANK OF BOSTON • THE LOCAL INITIATIVES SUPPORT CORPORATION
THE NATIONAL CONGRESS FOR COMMUNITY ECONOMIC DEVELOPMENT
THE NEIGHBORHOOD REINVESTMENT CORPORATION



Foreword

Decent, affordable housing is critical to the social and economic well-being of this country. Need for such housing continues to far outstrip demand, and those projects that do get built suffer from severe cost constraints. Quality design – too often considered an expensive amenity, rather than a cost-effective necessity – is usually one of the first components to be cut from a project in the name of cost containment. The result is a country dotted with projects that meet minimal shelter requirements but fall far short of the well-planned, well-designed and well-landscaped environments that we usually associate with quality housing.

There is a clear need within the affordable housing community for straightforward, easy to use guidance on how to achieve cost-effective design excellence. HUD recognized this need and has created the Affordable Housing Design Advisor in response.

The Affordable Housing Design Advisor is a new, CD-ROM based tool designed to help the developers, sponsors and users of affordable housing understand what constitutes quality design, why it is worth striving for, and how to achieve it in their own projects. HUD's objective is to dramatically increase the "design literacy" of the many non-designers whose activities are central to affordable housing production.

The Design Advisor is organized into three core content areas:

1. What is Good Design?
2. Why is Design Important?
3. How Can I Get A Well Designed Project?

Each area provides plain English, action-oriented guidance complemented by case study examples of successful projects and strategies. Of particular note are the "20 Steps to Design Quality" which provide clear direction on how the process of delivering an affordable housing project unfolds and where design considerations can and must fit in. This step-by-step guidance also forms the basis of the "Project Book," a 100 page, design-focused workbook which accompanies the Design Advisor CD-ROM.

HUD strongly believes that better design can make a difference in affordable housing and that quality design will: increase the economic viability of developments, improve the quality of life for residents, and enhance the vitality of communities. The Affordable Housing Design Advisor is a valuable new tool that will help the many non-designers who produce and deliver affordable housing in the United States achieve these objectives.

Susan M. Wachter
Assistant Secretary for Policy Development and Research

Table of Contents

| | | |
|-------------------------|--|-------------|
| Introduction | | |
| Master Design Checklist | | |
| Step 1. | Start Project Book | 1.1 – 1.2 |
| Step 2. | Review Advisor Resources | 2.1 |
| Step 3. | Understand Design Timeline | 3.1 – 3.2 |
| Step 4. | Obtain Professional Design Assistance | 4.1 - 4.2 |
| Step 5. | Establish Design Goals for Occupants | 5.1 - 5.2 |
| Step 6. | Establish Design Goals for Community | 6.1 - 6.2 |
| Step 7. | Test the Site | 7.1 - 7.2 |
| Step 8. | Begin Cost Analyses | 8.1 - 8.2 |
| Step 9. | Assemble Project Design Team | 9.1 - 9.2 |
| Step 10. | Develop 3 Site Plans | 10.1 – 10.2 |
| Step 11. | Use Design Checklist | 11.1 |
| Step 12. | Use O&M Checklist | 12.1 |
| Step 13. | Prioritize Design Components | 13.1 – 13.2 |
| Step 14. | Emphasize Design in Funding Applications | 14.1 – 14.2 |
| Step 15. | Prioritize Construction Systems | 15.1 – 15.2 |
| Step 16. | Prioritize Finishes & Hardware | 16.1 – 16.2 |
| Step 17. | Monitor Bids | 17.1 |
| Step 18. | Monitor Construction | 18.1 – 18.2 |
| Step 19. | Create O&M Manual | 19.1 – 19.2 |
| Step 20. | Complete Project Book | 20.1 – |

List of Figures/Examples

| | |
|--|--------------|
| Design/Development Matrix | 3.3 - 3.7 |
| User Activity Checklist | 5.3 – 5.17 |
| Neighborhood Context Analysis Worksheet | 6.3 – 6.13 |
| Access to Services Checklist | 7.3 – 7.8 |
| Site Suitability Test | 7.9 – 7.18 |
| Cost Analysis Checklist | 8.3 – 8.6 |
| How to Select the Right Architect | 9.3 – 9.6 |
| Design Considerations Checklist | 11.3 – 11.12 |
| Operation and Maintenance Considerations Checklist | 12.2 – 12.4 |
| Prioritized List of Key Design Components | 13.3 – 13.4 |
| Sections of Funding Application Stressing Design Form | 14.3 |
| Prioritized List of Key Construction Materials/Systems | 15.3 – 15.4 |
| Prioritized List of Key Finishes and Hardware | 16.3 – 16.4 |
| Key Bid Substitutions Form | 17.2 – 17.3 |
| Key Construction Substitutions Form | 18.3 – 18.4 |
| Operation and Maintenance Manual Checklist | 19.3 – 19.5 |
| Final Notes/Observations Form | 20.2 |

Additional Resources on the Design Advisor CD-ROM

Activity-Based Design Overview
AIA Documents Overview
Community Design Centers Overview
Design Considerations Checklist - Illustrated Version
Design Phase Definitions
Development Process Overview
Dwelling Types Overview
Gallery of High Quality Affordable Homes
Materials Handbook
Richmond, Virginia, Community Input Package
Sample Version B-141 Contract Document

Introducing the Project Book

The Project Book is a design-focused workbook that has been developed to help guide decision-making over the course of an affordable housing development project. It is intended to be used as a field manual to help structure and record key design decisions as they are made.

The Project Book is unique in that it is designed to be used interactively with the Affordable Housing Design Advisor, an electronic tool containing a wealth of detailed resources, links, illustrations and case studies which complement and expand on the information contained in the printed workbook.

Using the Project Book

The Project Book contains 20 individual chapters, each of which focuses on a specific set of actions that will help bring better design to an affordable housing development project. These sets of actions or “steps” are designed to be undertaken in sequence, beginning as early as possible in the Concept phase of development. (For a matrix indicating precisely when each step should be undertaken over the course of the development process, see Step 3.)

Most of the steps are accompanied by individual forms or checklists to help guide the actions called for in that particular step. The steps and their accompanying forms can be printed out individually, in groups or all at once. (See the Design Advisor, Step 1, for further information.)

As each form or checklist is completed, you can record the date of completion on the Master Checklist at the front of the Project Book. This will let you know where you are in the process and what comes next.

At every step it will be useful to consult the Affordable Housing Design Advisor for additional information. In particular, the Gallery and the Design Considerations Checklist should be visited and revisited for ideas and inspiration. Likewise the various tools and resources in the Advisor, including links to outside organizations and web sites, should be reviewed and used to help complete each step.

Systematic use of the Project Book, coupled with frequent consultation of the Design Advisor, will help ensure that your affordable housing development strives for and achieves the highest levels of design quality.

Master Design Checklist

| STEP | ACTION | DATE COMPLETED |
|--|---|----------------|
| 1. Start Project Book | Manual Printed Out and Inserted in Notebook | |
| 2. Review Advisor Resources | Design Advisor Steps, Gallery, and Design Considerations Checklist Reviewed | |
| 3. Understand Design Timeline | Design Development Matrix Reviewed | |
| | Design Phase Definitions Reviewed | |
| 4. Obtain Professional Design Assistance | Community Design Center Contacted | |
| | Professional Design Assistance Obtained | |
| 5. Establish Design Goals for Occupants | Comparable Projects Analyzed | |
| | Relevant Guidelines Assembled | |
| | User Activity Checklist Completed | |
| | Short Statement of Resident-related Design Goals Completed | |
| 6. Establish Design Goals for Community | Neighborhood Context Analysis Worksheet Completed | |
| | Short Statement of Community-related Design Goals Completed | |
| 7. Test the Site | Access Services Checklist(s) Completed | |
| | Site Suitability Test(s) Completed | |
| 8. Begin Cost Analyses | Cost Analyses Completed: | |
| | at completion of site evaluation | |
| | at completion of early schematic design | |
| | at completion of late schematic design | |
| | at completion late schematic redesign | |
| | at completion of design development | |
| | at completion of contract documents | |
| during bidding | | |
| 9. Assemble Project Design Team | How to Select the Right Project Architect Guidelines Reviewed | |
| | Architect Selected and Design Team Assembled | |

| STEP | ACTION | DATE COMPLETED |
|--|--|----------------|
| 10. Develop 3 Site Plans | 3 Alternative Site Plans Developed and Reviewed | |
| | Final Site Plan Selected | |
| 11. Use Design Checklist | Design Considerations Checklist Consulted During Early Schematics | |
| | Design Considerations Checklist Consulted During Late Schematics | |
| 12. Use O&M Checklist | O&M Checklist Reviewed and Filled Out: at completion of schematic design | |
| | at completion of design development | |
| | at completion of contract documents | |
| | during early phase of construction | |
| | when construction is 85% complete | |
| 13. Prioritize Design Components | Prioritized List of Key Design Components Completed | |
| 14. Emphasize Design in Funding Applications | Section of Funding Application(s) Stressing Design Quality Completed and Submitted | |
| 15. Prioritize Construction Systems | Prioritized List of Key Construction Materials and Systems Completed | |
| 16. Prioritize Finishes and Hardware | Prioritized List of Key Finishes and Hardware Completed | |
| 17. Monitor Bids | List of Key Bid Substitutions and their Impacts on Design Quality Completed | |
| 18. Monitor Construction | List of Key Construction Substitutions and their Impacts on Design Quality Completed | |
| 19. Create O&M Manual | O&M Manual Completed | |
| 20. Complete Project Book | Project Manual Completed | |