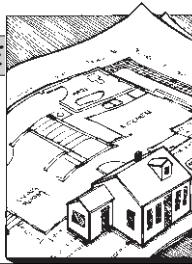


# Renovations, Part I: Educating The Client

by Gordon Tully



How often have you started a renovation project and ended up doing twice as much work as you bargained for? How many times have your remodeling clients been unable to make up their minds about what to do? How many times have you been blamed for budget overruns that are really caused by a client's indecision?

If your answer to these questions are "nearly always," as is my experience, perhaps the observations below will help.

## Amateur Designers

The chief obstacle facing the professional in defining a building project is that most clients are amateurs. To help a client through the process, a builder or designer must learn how to educate the client, providing the crucial missing pieces of information that will make the project work.

There are three important ways we can help our clients:

1. Most clients do not have a methodical way to decide what should be done, when it should be done, and how much it should cost. They need help in preparing a master plan.

2. To prepare a master plan and to define a particular renovation project, clients must learn a great deal about building design, construction and materials. We can help them accomplish this.

3. Most clients do not know how to ask for what they want. Their desires are usually based on an amateur attempt to pre-design a project. Often they add ethnic, religious, historical, and emotional burdens to what could be simple visual and functional decisions.

## The Remodeling Dilemma

Remodeling is really a continuous process. It includes everything from

buying new window shades, to adding a wing to the house: All are in the service of setting things right. Every week a home is remodeled in some smaller or larger way.

Yet to budget and schedule a building project, the owner, designer, and builder must draw the line somewhere, clearly defining a specific project. Builders and designers can help the client solve this dilemma and in this way can help protect themselves from unpaid fees, bum raps, and even litigation.

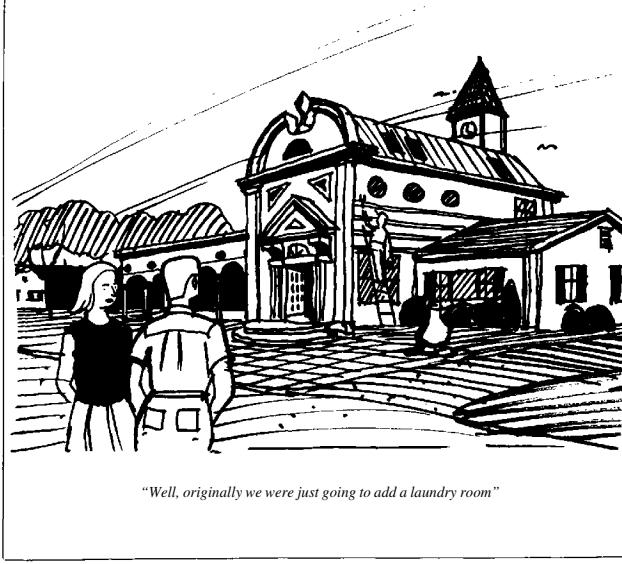
The basic idea is to insist that the client stop and examine how the current project fits into an overall plan. Does the project make sense economically and chronologically? Have logical alternatives to the project been defined and evaluated? Is there other needed work which should take precedence? Does the project solve a real need? Can the project be postponed? Should it be expanded?

## The Need For A Master Plan

Most people put off making plans until some need is simply too great to ignore. One client I had for a short time called the architect in February to get ready for a baby in August. Aging goes on all the time, yet most owners wait until they are in their 70s before planning an apartment in their home or setting up barrier-free access in their summer house.

A master plan helps guide the process. The plan should:

- Take account of the ages, lifestyles, and life plans of each occupant in the home.
- Take account of expected income.
- Examine many alternative solutions to each problem, including moving.
- Include an estimated price next to each item in the plan.
- Include provisional plans to cover financial and personal disasters.



"Well, originally we were just going to add a laundry room"

- Include a budget for each year, looking ahead a minimum of 5 years, with a more flexible plan for another 5 years.
- Be revised annually.

Every householder makes plans like this all the time, but not in a systematic way. Reading Sunday supplements and home magazines is part of preparing an informal master plan for the future. My suggestion is to make a very specific, written plan which includes the widest possible range of options.

Every time you deal with a remodeling client, suggest the idea of a remodeling master plan. Many people won't bite, but some will, and there is a good chance they will hire you to help them develop it.

owner might not have had the house inspected, or might have received bad advice.

Don't begin a remodeling project where the scope has been defined by the owner at least pointing out that there may be other, perhaps more serious problems to be attended to. Insist that the master plan include all the necessary items.

## Educating the Homeowner

I have for years taught a course at Harvard which tries to help small-scale developers or potential homeowners learn how to educate themselves. Based on this course, here's some advice you can give clients in their search for accurate information:

### Read everything, but with a grain of salt.

Periodicals are the primary sources for up-to-date information. *New England Builder* is of course one of the best sources of practical information. In matters relating to energy and indoor air quality, *Energy Design Update* is a must-read. *Fine Homebuilding* helps on matters of craftsmanship, and like *NEB* has excellent ads. The three glossy architectural mags are sometimes interesting, particularly *Record Houses*. Even the newspapers provide good data at times, although they are generally very inaccurate.

Various do-it-yourself series are published by *Reader's Digest*, *Ortho*, *Sunset*, *Time-Life*, etc., and I find them all good reading, if repetitive.

**Attend home shows.** These are pretty boring to the professional, but can give the homeowner a good idea of what's new and selling. Suggest they bring their own lunch.

**Visit and observe other people's homes.** It's a valuable way to pick up new ideas. But tell the client not to go for something merely because it is in the homes of several friends, however: They may all be wrong.

**Tour condos and new home developments.** Your client may get on a mailing list or two, and should probably avoid the worst give-away come-ons. But the experience can be very revealing (it will make your client's present home look pretty good). Advise them to go with a builder or architect, who can help point out details.

**Tour showrooms.** No matter how hard I try, our office library can't keep up with the proliferation of new products. Showrooms are the best way to keep up with baths, kitchens, plumbing fixtures, trim, tile, lighting, and windows.

**Hire an expert.** What more can I say, except that it helps to know your expert. An architect who does renovations for a living is the best choice. A good search can turn up a decorator who will walk through and make good remodeling suggestions.

**Take a trip to the local building department.** Learn something about the local zoning ordinance. Many good ideas die and many impossible dreams persist because the owner did not know what could or could not be done within the zoning. Again, an expert can help.

Next month, we'll focus on how you can help a client clearly define the renovation project, and thereby make life much easier for all parties involved. ■

*Gordon F. Tully is president of Tully & Ingersoll Architects in Cambridge, Mass.*