



CLIENT SURVEY

DESIGN · BUILD · MANAGE

The design process always begins with an idea. To help us find out more about you, your needs for this project, and as part of the search for that seed of an idea, we have developed the following list of questions.

This survey is a means to explore the possibility latent in the project — it should not be viewed with any rigor at all. If there are questions you don't feel like answering or that don't apply to your situation, by all means, skip over them. Equally, if there are ideas or insights you have that aren't addressed, please share those as well.

Let's get started...

CLIENT INFORMATION

CLIENT NAME

DATE

PHONE NUMBER

EMAIL ADDRESS

PROPERTY ADDRESS / LOCATION

REFERRED BY

PROJECT INFORMATION + GOALS

PROJECT SCOPE

Renovation · Addition · New Construction · Outbuildings · Garage · Pool · Guesthouse · Barn · Shed

BRIEFLY DESCRIBE YOUR PROJECT

WHAT ARE THE PROJECT GOALS? WHAT DO YOU HOPE TO ACHIEVE?

SCHEDULE

WHEN WOULD YOU IDEALLY BEGIN CONSTRUCTION? IS IT FLEXIBLE?

EXISTING DOCUMENTATION

Lot Description Plan (Realtor)	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Site Survey	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Topographic Survey	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Boundary Survey	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Existing House Drawings	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Septic Plan	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Property Deed	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Known Development Restrictions	<input type="checkbox"/> Yes	<input type="checkbox"/> No

IF DIGITAL FILES EXIST (PDF, DWG), PLEASE NOTE WHICH:

DESCRIBE ANY KNOWN DEVELOPMENT RESTRICTIONS:

SPECIAL CONSIDERATIONS + BUDGET

ARE THERE OBSTACLES, CONSTRAINTS OR SPECIAL NEEDS THAT MAY INFLUENCE THE PROJECT?

Access, occupation during construction, site contamination, special permitting, etc.

WHAT RESOURCES DO YOU PLAN TO COMMIT TO THIS PROJECT?

Construction budget typically excludes soft costs (design fees, engineering, permitting).

NEGOTIATED CONTRACT OR COMPETITIVE BID WITH MULTIPLE CONTRACTORS?

SITE + SETTING

WHAT DO YOU CONSIDER SPECIAL ABOUT YOUR BUILDING SITE?

HOW DO YOU ENVISION THIS PROJECT RELATING TO YOUR SITE?

ARE THERE SIGNIFICANT SITE FEATURES THE HOME SHOULD ORIENT TO OR AWAY FROM?

DESCRIBE ANY TRANSITION AREAS BETWEEN THE HOUSE AND SITE (DECKS, TERRACES, PORCHES):

DESCRIBE ANY SIGNIFICANT OUTDOOR SPACES REQUIRED (LAWN, COURTS, POOL, GARDENS):

HOW DO YOU ENVISION ARRIVING TO YOUR HOME?

VEHICLE REQUIREMENTS? GARAGE, CARPORT, PARKING, EQUIPMENT PROVISIONS?

DESCRIBE YOUR ATTITUDE TOWARD VEHICLES (HIDDEN, ON DISPLAY, INDIFFERENT):

DESCRIBE ANY SITE ACCESS CONSTRAINTS (LONG DRIVE, EASEMENTS, ETC.):

Will you be involving a landscape architect in your project?

Yes No

IF YES — LANDSCAPE ARCHITECT NAME / CONTACT:

LIFESTYLE + PROGRAM

WHO WILL BE LIVING IN THE HOME? WHAT IS THE PURPOSE OF THE HOME?

IF YOU BUILD IT, WHO WILL COME? GUESTS, FRIENDS, FAMILY? HOW MANY AT A TIME?

WHAT LEISURE ACTIVITIES ARE IMPORTANT TO YOU?

WHAT WORK ACTIVITIES ARE IMPORTANT TO YOU? DO THEY TAKE PLACE AT HOME?

IS THERE A PARTICULAR STYLE THAT YOU RELATE TO OR LIKE?

DESCRIBE YOUR SENSIBILITIES: FORMAL, MODERN, CASUAL, MINIMALIST, INDUSTRIAL, ECLECTIC?

WHAT FEELING SHOULD THE FINISHED HOME CONVEY?

ENTERTAINING + KITCHEN

DO YOU ENTERTAIN OFTEN? FOR HOW MANY?

IS COOKING A PRIORITY? SHOULD THE KITCHEN INCORPORATE PROFESSIONAL EQUIPMENT?

OPEN TO OTHER SPACES OR ENCLOSED/SEPARATE?

IS THE KITCHEN A PLACE TO EAT AS WELL?

SEPARATE DINING SPACE? FORMAL OR INFORMAL? HOW LARGE IS YOUR DINING TABLE?

MEDIA + RECREATION

IS TV/MOVIE VIEWING A FOCUS? HOW DOES IT RELATE TO YOUR LIVING SPACES?

IS MUSIC A FOCUS? ANY LARGE INSTRUMENTS TO ACCOMMODATE (PIANO, DRUMS)?

DO YOU REGULARLY READ? IS BOOK STORAGE IMPORTANT? ANY SPECIAL EQUIPMENT (EXERCISE, TOOLS)?

INTERIOR PREFERENCES

WHERE DO YOU SPEND MOST OF YOUR TIME IN YOUR CURRENT HOME? DESCRIBE THAT SPACE.

ARE HIGH CEILINGS IMPORTANT TO YOU? PREDOMINANT COLOR SENSE? (BRIGHT, MUTED, NEUTRAL, EARTHY)

ARE YOU SENSITIVE TO SOUNDS? SHOULD SPACES BE SOUND-ISOLATED? SINGLE-LEVEL LIVING AN IMPORTANT CONSIDERATION?

DO YOU ANTICIPATE AN ELDERLY FAMILY MEMBER LIVING WITH YOU IN THE FUTURE?

DESCRIBE ANY IMPORTANT ADJACENCIES BETWEEN ROOMS:

COMMUNICATION + COLLABORATION

IS THERE A PARTICULAR WAY YOU WOULD PREFER TO WORK WITH US? PREFERRED MODE OF COMMUNICATION?

IS THERE ANYTHING ELSE WE SHOULD KNOW ABOUT YOU OR YOUR FAMILY THAT MIGHT IMPACT THE PROJECT?

RENOVATIONS + ADDITIONS

Complete this section if your project involves an existing structure.

SHOULD THE FUNDAMENTAL CHARACTER OF THE SPACE BE ALTERED, REINVIGORATED, OR RESTORED?

WHAT DO YOU LIKE ABOUT THE EXISTING STRUCTURE?

WHAT WOULD YOU CHANGE ABOUT THE EXISTING STRUCTURE?

DOES THE EXISTING STRUCTURE ADEQUATELY MEET YOUR SPACE NEEDS? IF NOT, WHERE IS IT LACKING?

HOW MUCH TIME DO YOU SPEND IN: LIVING AREAS / BEDROOM / KITCHEN / OUTDOORS?

IS THERE A FAVORITE SPACE IN THE EXISTING HOUSE? WHY?

IS THERE SOMETHING THAT MUST BE PRESERVED? SENTIMENTAL OR OTHERWISE?

RENOVATIONS + ADDITIONS (CONTINUED)

Are you open to demolishing the existing structure and starting from scratch?

Yes No

IF CONSIDERING AN ADDITION, WHAT SPACES SHOULD IT CONTAIN?

WHAT RELATIONSHIP SHOULD THE ADDITION HAVE TO THE EXISTING? (CONNECTED, SEPARATE, SIMILAR, DIFFERENT?)

PLEASE LIST ANY EXISTING LIABILITIES OR HAZARDS YOU ARE AWARE OF:

Geotechnical, structural, mechanical, energy, mold, rot, envelope problems, etc.

GENERAL — NEW CONSTRUCTION + ADDITIONS / RENOVATIONS

PLEASE LIST ALL SPACES YOU WOULD LIKE IN YOUR HOME (YOUR WISH LIST):

ARE THERE SPACES THAT COULD BE ELIMINATED IF BUDGET WERE AN ISSUE?

FINAL SIZE OF HOME (SF, # OF FLOORS)?

LIST ANY CRITICAL ADJACENCIES:

DESCRIBE ANY ARCHITECTURAL PREFERENCES, INSPIRATIONS OR STYLISTIC PREDILECTIONS:

ARE THERE SPECIAL FEATURES THAT SHOULD BE INCLUDED? (FIREPLACE, SUNROOM, ETC.)

ANY PARTICULAR MATERIAL PREFERENCES OR DISLIKES?

Concrete floors, hardwood, plywood, steel, glass, granite, shingles — both exterior and interior.

Are you interested in alternative energy sources (geothermal, solar, wind)?

Yes No

Will this be a year-round home?

Yes No

ADDITIONAL NOTES

PLEASE SHARE ANY ADDITIONAL THOUGHTS, IDEAS, OR INFORMATION NOT COVERED ABOVE:

CLIENT SIGNATURE

DATE

Thank you for taking the time to complete this survey.

We look forward to bringing your vision to life.