

	July 17	July 18	July 19	July 20	July 21	July 22	July 23
8 am	Item 1 (Complete Drawings and Specs)	Item 4 (Project Inspection Report)		Item 15 (Project Design/Estimate Presentation)	Item 22 (Correspondence Admin.)		
9 <sup>00</sup>		Item 5 (Project Change Notices)	Item 9 (Project Invoicing)			Item 25 (RFP Proposal Completion and Printing)	Item 27 (Research and Reading)
10 <sup>00</sup>					Item 23 (Project Site Meeting Minutes)		
11 <sup>00</sup>		Item 6 (Application Review)	Proposal (Final Submission)	Item 16 (Project Meeting Minutes)	Item 23 (Project Site Meeting Minutes)	Next Week Time Management and Planning	
12 pm			Item 11 (Consultant Meeting)				
1 <sup>00</sup>	Item 2 (Review Project with Client)	Item 7 (Request For Proposal (RFP) Review/Prep)	Item 12 (Project Design Drawings/Sketches)	Item 17 (Past Project Tender Submissions)	Item 24 (Project Drawing Design and Development)		
2 <sup>00</sup>				Item 18 (Tender Preparation)			
3 <sup>00</sup>				Item 19 (Tender Preparation)			
4 <sup>00</sup>	Item 3 (Project Site Inspection)		Item 13 (Project Budget Estimate)	Item 20 (Drawing Preparation)			
5 <sup>00</sup>			Item 14 (Contractor Tender Questions)				
6 <sup>00</sup>							
7 <sup>00</sup>		7:00pm-9:30pm Item 8 (Town Hall Meeting)		Item 21 (Dinner with Client)			
8 <sup>00</sup>							

**A WEEK IN THE LIFE OF AN ARCHITECT**

(A profile of July 17 through 23, 2006)

(FINAL SUBMISSION)

COURSE: MANAGEMENT SEQUENCE

COURSE NO.: MG-2, PROFESSIONAL RESPONSIBILITY

REPORT NO: TWO

STUDENT: KURT DIETRICH

STUDENT NO.: SK850N23

TERM NO.: ONE (2006)

SUBMISSION DATE: 28 APRIL 2006

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## **EXECUTIVE SUMMARY**

The activities of a single practitioner through the course of a single week are varied and diverse. The ability to manage multiple tasks is essential to maintain a professional practice as a successful business enterprise. This multi-tasking approach involves everything from managing different stages of project development and construction, to conducting the business operation of a professional practice.

The background of a Registered Architect (Education, Experience, and Examination) provides the introduction and foundation required to function at full capacity. It also takes self-discipline and a level head to maintain productivity and experience the pleasure of the profession.

## **TERMS OF REFERENCE**

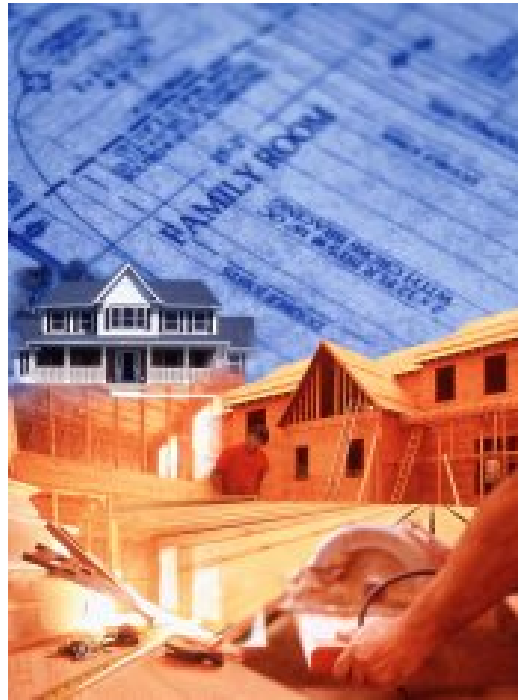
The scope of this report is intended to provide a “snapshot” of the activities related to architectural practice. This report “snapshot” allows for activities which would be ongoing as one enters the week, and will carry on through subsequent weeks.

“Articles of Reference” as provided by the Royal Architectural Institute of Canada, as well as provincial associations, were used in compiling a “typical” week. The majority of tasks and experiences are based on the author’s perspective after 20 years of activity in the industry.

## METHODOLOGY

This report was derived through research and collection of data from architectural associations (national and provincial), as well as background information within the library of a practitioner’s office. The methodology was also followed using a regular schedule of the author, combining activities to present as diverse (yet manageable) a schedule as possible.

The report is presented as an overall timetable of the week, with explanatory text following that relates to each task noted. In this manner, one can gain an overview of a “week in the life on an Architect”, as well as an understanding of the impact and relevance of the various activities.



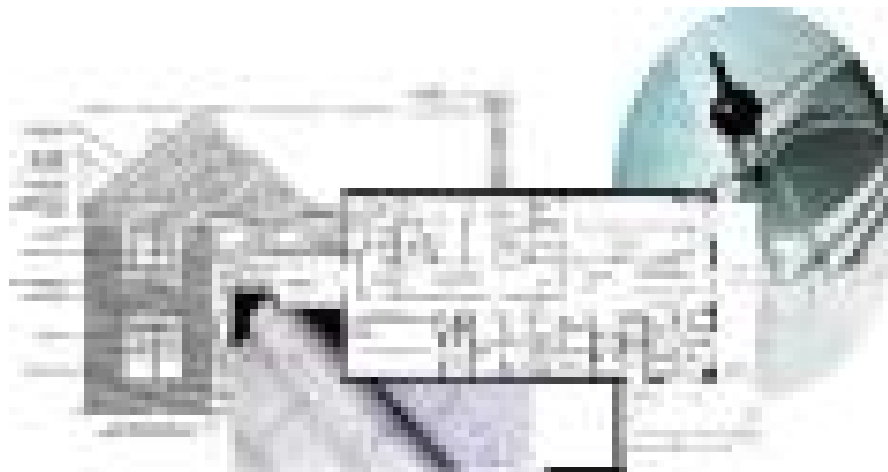
## INTRODUCTION

*“ARCHITECTURE is a passion, a vocation, a calling, as well as a science and a business. It has been described as a social art and also an artful science.”*

RAIC Canadian Handbook of Practice, 1999

The practice of architecture involves both sides of the brain. A Registered Architect must be capable of rational, logical (black & white) thought processes while maintaining the skill to vision out the unknown. This requirement, essential for that of a professional practice, dictates that an Architect must be capable of “wearing multiple hats” as consultant, team leader, teacher, partner, and business owner.

The practice of an Architect doesn’t stop at the close of the business day. Pursuing a career in Architecture involves accepting Architecture as a way of life, a way of looking at the world and making sense of our environment. It also involves continual education and personal growth in order to stay “sharp” and current with changes in the industry.



REPORT TEXT:

The Week at a Glance

	July 17	July 18	July 19	July 20	July 21	July 22	July 23
8 <sup>am</sup>	Item 1 (Complete Drawings and Specs)	Item 4 (Project Inspection Report)	Item 9 (Project Invoicing)	Item 15 (Project Design/Estimate Presentation)	Item 22 (Correspondence Admin.)	Item 25 (RFP Proposal Completion and Printing)	Item 27 (Research and Reading)
9 <sup>00</sup>		Item 5 (Project Change Notices)					
10 <sup>00</sup>		Item 6 (Progress Application Review)	Item 11 (Consultant Lunch)		Item 16 (Project Meeting Minutes)		
11 <sup>00</sup>	Item 2 (Review Project with Client)	Item 7 (Request For Proposal (RFP) Review/Prep)		Item 12 (Project Design Drawings/Sketch)	Item 17 (Past Project Tender Submissions)	Item 24 (Project Drawing Design and Development)	
12 <sup>pm</sup>	Item 3 (Project Site Inspection)	Item 13 (Project Budget Estimate)	Item 14 (Contractor Tender Questions)	Item 18 (Tender Review/Budget)			
1 <sup>00</sup>				Item 19 (Tender Summary/Recomm)			
2 <sup>00</sup>				Item 20 (Drawing Preparation)			
3 <sup>00</sup>							
4 <sup>00</sup>							
5 <sup>00</sup>							
6 <sup>00</sup>							
7 <sup>00</sup>		7:00pm-9:30pm Item 8 (Town Hall Meeting)		Item 21 (Dinner with Client)			
8 <sup>00</sup>							

The following text explains the individual tasks in detail, citing the relationship between various tasks of the week.

## Explanation of the Weekly Tasks

### Monday

1) *Complete drawings and specifications on project*

Project completion on time is essential to meeting deadlines established with clients and consulting team members. The complexity of the project requires a determination by the Architect at the outset as to the level of detail required and the type of information to be included in the documents.



2) *Review project with Client*

Once drawings and specifications are complete, ready for tender call to the construction industry, a final review with the client is conducted. This review will cover:

- Critical aspects of the proposed contractual arrangements called up in the specifications (completion date, mitigating factors, special conditions).
- Review of materials selected as specified in the documents, including finishes, textures, colour and quality.
- Review of the drawings to ensure the needs and desires of the client have been addressed. These needs and desires would have been identified at the outset of design, possibly many weeks prior to this date. It is important to review these items at this final point to either illustrate how items have been incorporated, or discuss why they may have either been excluded or altered. Any decision to exclude a specific item (need or desire) should have been reviewed with the client long before this point. This meeting is intended to serve as a final review, not a surprise, in the process.



- Discuss and confirm the project estimates now being detailed and precise upon completion of the documents.
- Discuss and agree on the future course for the project – tender dates, addenda issuance, and the process of receipt and review of submitted tenders.
- Obtain the client’s final approval to issue the project to the industry for tender, including review of tender advertisements and possible list of bidders (depending on confirmed tender type).

### 3) *Site Inspection*

Regular attendance at construction sites is a requirement of the profession to ensure that the project is being completed according to the documents.

The time management skills of the Architect are constantly challenged to schedule project meetings (such as Item #2) with sufficient time to conduct and conclude the meeting prior to traveling to a separate project under construction.

Safety gear (CSA boots, hardhat and eyewear) are requirements in order to access a construction site. The Architect conducting the inspection must ensure that they have proper fitting gear ready for use at all times.





While on site, the Architect may be asked to interpret the documents for clarification to the General Contractor and subcontractors, review scope and progress of the work and confirm overall quality and conformance with the construction documents.

### **Tuesday**

#### 4) *Prepare Inspection Report*

It is essential that a written record of the construction be kept by the Architect. This written record should include categories such as:

- Date of inspection
- Personnel present
- Reason for inspection
- Weather at the time of inspection (including recent changes in conditions).
- Notations of work completed or in progress at that time.
- Notation of materials stored on site (typically only materials that have arrived since the last inspection report are noted)
- Description of items requiring attention – an itemized or descriptive explanation of conditions or situations encountered on site that are not congruent with those anticipated by the contract documents. This explanation should succinctly note the exception and provide direction on how to carry on in the work. Any further action that may be required by Owner or Consultant team should also be noted.

- Identify the anticipated construction progress schedule from this point until the next scheduled inspection.
- Identify and include any additional reports as may be supplied by engineering consultants.
- Identify the planned date and time for the next inspection (notations should be made here if specific team members will be required to attend).
- Distribution to all parties involved in the project.

5) *Issuance of Change Notices on Inspected Project (Contemplated Change Notice)*

Changes to a project under construction must always be accurately documented. If changes were required, as determined in Item 4, then the Architect must issue either:

- a “Field Memo” to record the change. Field memos are issued to record changes to the work that do not affect project scope or price; or
- a Price Change Request (or Contemplated Change Notice) if changes to the work alter entire the project scope or price. (The issuance of change notices must reflect accurate information in order to be clear in demonstrating what was changed and how it is now to be constructed).

6) *Review Contractor’s Progress Application on Inspected Project*

A General Contractor will submit application for payments to the Architect on a regular, pre-approved schedule. The Architect must review the amount of funds requested by the contractor on site in order to ensure they are requesting a fair and reasonable amount relative to the project progress at that time.

If there is any disagreement regarding the valuation of the project, then the Architect should work with the Contractor to arrive at a mutually-agreed amount.

The Architect is then responsible to prepare a Payment Application citing the amount currently owed to the Contractor. This Payment Application (Progress Certificate) is signed by the Architect, giving the client assurance that the amounts have been verified on site.

7) *Proposal Review*

Researching, pursuing and engaging new commissions is an ongoing process of the architectural profession. On occasion, a project will be granted to the firm by existing clients or new clients who have learned of the Architect’s skills. Quite often, a request for proposal (RFP) is received by the Architect via mail, etc. These RFP’s require careful scrutiny and review in order to determine the scope of services requested, firm commitment required and the complexity of the project. The time spent on proposal review and submission is not billable to any party, although the Architect must expend this time if they desire to participate.



8) *“Town Meeting” Participation (Evening)*

Architects often engage with community or volunteer organizations on a wide variety of commissions. The role of the Architect may be traditional (a Consultant) or may be as an advisor, member of the group or merely an interested individual.

Architects often attend evening or weekend meetings in order to suit the schedule of the client group. Any fees or changes associated with work or travel outside of normal business hours should be confirmed with the client at the outset of the commission.

**Wednesday**

9) *Issue invoicing on projects.*

The Architect must maintain an astute business sense in order to ensure that their operation remains financially viable. Invoicing for work completed according to the rates and stages of the work must be kept current and accurate.

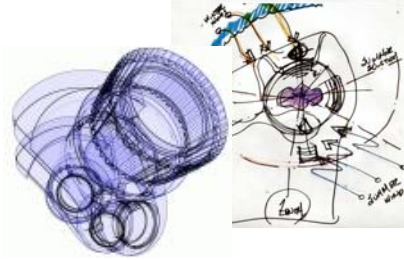
10) *Proposal Preparation*

The Architect must often assemble a consulting team of engineers as a requirement of the RFP received (see item #7). Assembling a team to suit the defined client requirements, gathering the required data and creating a proposal takes a clear line of thought and sufficient time to prepare. On occasion, this effort may require meeting with the consulting team to disseminate the RFP and assign appropriate tasks for the intended team members.

11) *Consultant Lunch*

Opportunities exist within the profession to develop both personal and business relationships. There are often occasions when a project meeting can occur in the morning or afternoon which allows for leisure and enjoyment to take place over lunch.

These social/business opportunities are important toward development and confirmation of a rapport among the consultant team.



12) *Project Design Sketches*

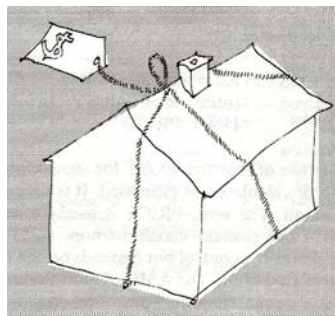
Architects spend their time studying the client's specific needs, problems and desires through a series of project design sketches. These sketches are completed during the Conceptual Design or Design Development stage of a project. These sketches are used to reflect the Architect's design solution to the client in graphic form, leading to approval of a final design solution.

Time management is critical to ensure that the Architect has allowed sufficient time to fully explore the potential design solutions, and be able to prepare a clear set of drawings / illustrations for the client presentation.

13) *Project Budget Estimate*

An estimate is required to accompany design sketches in order to ensure that the concept developed, while potentially resolving the client's needs/desires, doesn't exceed their financial commitment. It takes the skill and experience of the Architect to understand the impact that the design choices (materials, complexity, methods) will have on project cost.

Project Budget Estimates are prepared in conjunction with Project Design Sketches to provide a “full picture” of the intended solution.



14) *Phone Calls and Questions*

The phone rings and people need to contact you. That reality occurs every day. An Architect with projects at various stages of drawing and construction will have to field questions from contractors, clients, subcontractors and consultants. The amount and duration of calls that the Architect accepts must be carefully managed in order to ensure that adequate time remains for the business and practice development components.

It is important to remember that every call takes five minutes of the work-day. Managing calls, being succinct and monitoring time allotments will enable the Architect to keep the practice, and their sanity, in good order.

**Thursday**

15) *Design Presentation*

An Architect will coordinate with their client to schedule design presentations at appropriate stages of development. These presentations may be in the format of formal review or they may be a “casual” meeting. The type of presentation expected by the client must be identified in order for the Architect to be adequately prepared with information sufficient for all members present.

The Architect will complete the Project Design Sketches (item 12) and Project Budget Estimate (item 13) along with a written design brief. These items are then presented to the client with specific reference to the manner by which the design solution responds to the client’s needs, desires, or specific problem.

16) *Minutes of Meeting / Presentation*

The Architect is often responsible to prepare the minutes of a meeting or presentation. It is important to accurately record the discussion, and especially the decisions made by the client at the meeting. These records can be invaluable during times of confusion and hearsay.

The Architect will draft the minutes and forward them to the client for review. These minutes, similar to those prepared by the Architect for construction meetings, should contain:

- Date of the meeting/presentation;
- Purpose of the meeting;
- Personnel present;
- Items reviewed during the span of the meeting;
- Explanations of the discussions, with a clear direction or decision noted;
- Identification of tasks and personnel assigned to the tasks;
- Schedule anticipated until the next meeting; and
- Identification of future meeting dates, times, and locations.

17) *Receive Contractor Tenders on Issued Projects*

The Architect typically acts as the client representative during the tender period. This role involves receiving tenders (and revisions to contractor quotations) at the Architect's office.

The process of opening tenders (whether the opening is public or private) is an exercise that must be conducted with legal civility. Contractors have spent hours preparing their bids and incurred costs to prepare bonds and insurance documents. The process of opening tenders must be conducted properly, without a casual nature.

Failure to treat this process with great respect and due diligence on behalf of the Architect may expose the client to legal action or complaint by contractors. The legal case of Ron Engineering still reverberates through the industry.

18) *Review Tenders and Budget*

Architects are required to analyze the tenders a compared with their own budget submission to the client. If the tenders have come in “on or below” budget, the analysis is usually an easy matter. If the tenders vary greatly (either much higher or much lower) than the budget, the Architect must take the time to ascertain what transpired, what impact it may have on the project, and what the best recommendation may be to the client.

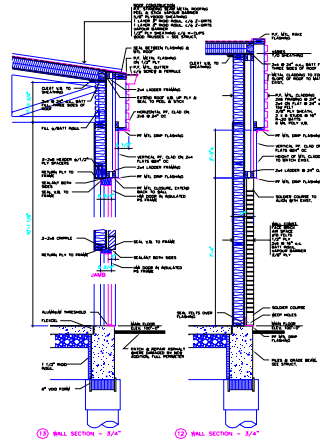
The analysis may require some discussion with contractors, upon receiving the owner’s approval to do so. The Architect must remember that the potential contract is between client and contractor. Any contact with contractors during the tender analysis period may only occur with the client’s approval.

19) *Project Recommendations*

The Architect, in response to items 17 and 18, will typically write a summary of the project tenders received. This summary will note all the information received from the contractors, the result of the tender/budget analysis, and provide a suggested course of action for the client to consider (award a contract, suspend tenders, cancel tenders, etc.).

The recommendation summary prepared by the Architect must be thorough and accurate in their portrayal of both the status of the project and the suggested course of action to follow. The next stage of a project is to commence construction.





20) *Construction Document Preparation*

The course of a week for the Architect doesn't always revolve around administrative elements. Construction document preparation of approved design sketches (items 15 and 16) must be scheduled and undertaken within an appropriate time-frame of approval.

The Architect must accurately schedule sufficient time to:

- Complete construction drawings and specifications
- Coordinate with engineering consultants
- Review consultant drawings in coordination with Architectural drawings and specifications.
- Review project status with Client at regularly scheduled meetings. (See Item #2)
- Prepare the final tender documents ready for the Contractor's use in bidding.

21) *Dinner with Client*

The Architectural profession, by its very nature, tends to draw persons together through a common alliance to a project. Architects must be able to understand and get to know the Client in order to respond to the needs of the project. Through this process, a friendship or close business relationship often develops.

These opportunities allow the Architect the chance to spend leisure time with Clients on an informal basis.

Business dinners may sometimes be used to discuss projects and responsibilities but often they offer the chance to spend enjoyable time with persons you have come to know during the project's duration.

### **Friday**

#### 22) *Correspondence*

Time must be allowed each week to manage correspondence, requests, information packages and general mail items that constantly arrive. The process of time management plays a large role in this effort; an effort similar to the phone call situation noted in Item #14.



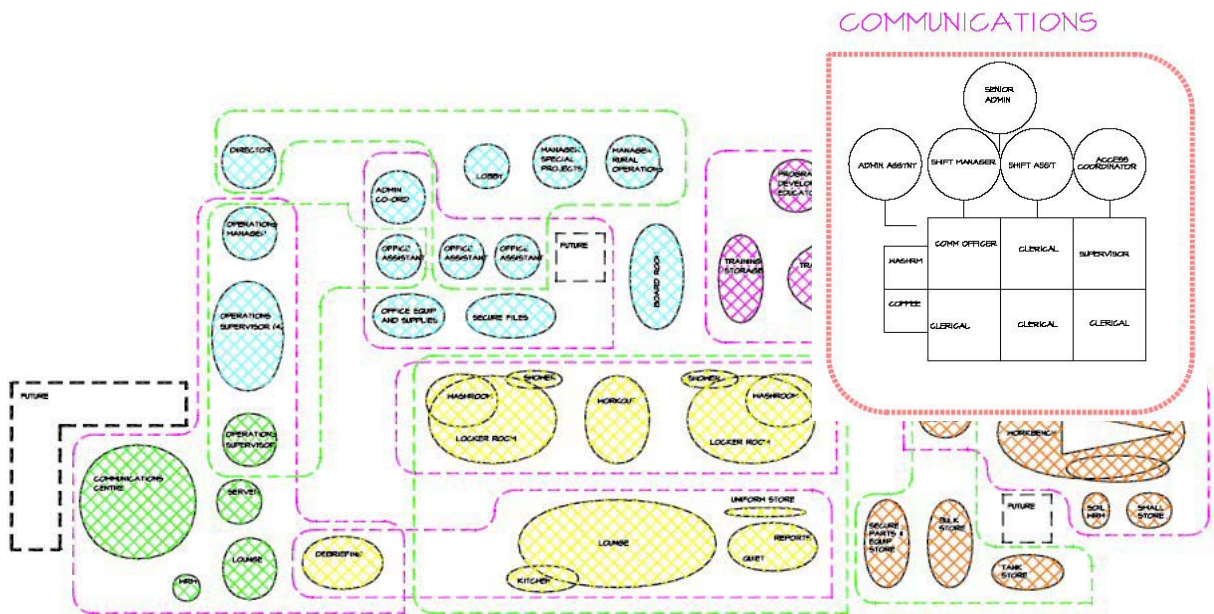
#### 23) *Project Site Meetings*

Architects attend the site meetings for their projects under construction. The Architect may act as Chairperson for the meeting or perhaps as consulting participant, depending on the type of Client. Some Project Managers or Clients prefer to chair the meetings, having the Architect present as advisor and consultant.

The Architect must keep accurate notes relative to the discussion items at the meetings. If they are responsible to prepare the minutes of the meeting, they should follow the format outlined in Item #16. The minutes of the meeting serve as a longstanding record of the project. Their importance should not be taken lightly.

24) *Drawing Development*

The Architect must constantly manage their time to ensure that they can focus on the requirements of design, construction document and drawing preparation. There are no shortcuts to doing a good job. The quality of the documents provides a direct reflection on the skills and commitment of the Architect to the project. Banking an afternoon or sufficient block of time will allow the Architect the opportunity to focus on the job and develop the best possible solution within their skills.



**Saturday**

25) *Proposal Completion*

Architects often spend the “off-hours” completing tasks that don’t reflect directly on the current day-to-day activities and deadlines of a practice.

The Architect may find a quiet morning will allow them sufficient opportunity to complete the requirements of an RFP (see Item #7) and finish the collation of the necessary copies.

26) *Time Management and Planning*

The Architect's efforts are self-directed. They must develop their own means and methods of time management. This skill will sometimes require planning ahead for the coming week, allocating necessary time to complete upcoming tasks in order to meet established deadlines.

**Sunday**

27) *Research / Reading*

An Architect must remain current with materials available, changes in the industry and movements/activities of fellow practitioners. Background reading and additional knowledge skills are key elements that enable the Architect to grow as their career develops. Research into specific articles may also be used in some cases toward the Mandatory Continuing Education program as Self-Directed Learning Units.

The opportunity for an Architect to relax and read doesn't typically arise during the busy work week. As stated at the outset of this report, Architecture is not a job; its a way of life.

## **CONCLUSION**

The weekly activities of a single practitioner are varied, diverse and challenging. There are many opportunities for discovery, knowledge enhancement, enjoyment and excitement; just as there are occasions of mundane but necessary tasks.

The crucial element required for any individual in this setting is an effective time management philosophy. The Architect must allow sufficient time to complete tasks, conduct meetings and focus on producing high quality documents (design and construction.)

## **RECOMMENDATIONS**

The recommendations of this report relate to the time management component of the Architectural profession. It is recommended that National and Provincial Associations develop effective time management courses applicable to MCE programs. These courses would be offered to all members of the Profession as many persons employed by large firms face the same time management crunch as single practitioners. If courses are recognized as MCE mandatory learning units, there is a greater likelihood that Architects would make themselves available to participate.

The most common complaint in accessing a course of this type would be that the single practitioner doesn't have the time; a clear indicator that they would need a course of this type. It is suggested that an MCE program of this type be made available on-line (web based distribution) to allow practitioners the opportunity to participate as they are available.

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