



**Blackbriar**

**OUR PROCESS**

# Your Path to Success.

## **INTRODUCTION**

Building a project or home can feel like a overwhelming process, especially if you have never done it before. That said, when the process is broken down into smaller steps, it seems like a much more realistic undertaking. Visualizing and realizing the process a step at a time makes the first step feel more like a manageable step and less like a giant leap.

The longer the process of building a high-end project takes, the more the costs can get out of hand so its important to plan. Understanding the typical timeline before starting makes it possible to plan ahead, and planning is critical to your success. The more preparation you can do, the more efficient and cost-effective the build will be.

You should understand your responsibilities as an owner throughout the process with your team. Although Blackbriar Development can do all the heavy lifting, you must take an active role in the process for it to be successful. You as the Owner are an integral part of the team, and the job includes making decisions quickly and efficiently and collaborating on certain aspects of the project.

This process guide provides a overview of the process and breaks it down into detailed steps 1 by 1. Individual circumstances are always different, but having a good idea of the processes in California is an essential step in the journey to building any high quality project, especially the legacy level of craftsmanship we deliver, and you deserve.

## GETTING STARTED.

### 1. FEASIBILITY STUDY.

Our owners are continuously looking at building sites in the greater LA metro area, looking for prestige and value. We use custom built software to assess FAR (FLOOR AREA RATIO) / Slope Band Analysis (The purpose of the Slope Band Analysis is to quantify the floor area density of a site according to the severity of the slope. A key feature of this provision is the bonus options that award 20% additional FAR depending on which limiting design options are exercised).

We look for under built sites in valuable areas with attractive exits. Part of the service we provide and undertake with our financial partners is producing feasibility studies with financial pro forma to allow an offer to be made on attractive real estate.

The first meeting with Blackbriar includes a discussion about the type of project, details about the land, and, of course, the budget. If a design hasn't already been produced, Blackbriar will help determine which approach is best for the site and which team best matches your project's goals and the features & amenities which will be required to ensure best value for the end product. At this stage, we would enter into a Concept Agreement for the project.

### 2. FINANCING.

If financing is desired, Blackbriar can calculate an estimate of the total project hard and soft costs - including financing costs, design costs, land, site development, and the build costs. With this number, you will be able to be pre-qualified for acquisition & construction financing based on the expected costs of the entire project. Pre-qualification allows the project to move forward to the next step: the site visit Blackbriar can also connect you with a number of financial institutions which may be able to provide attractive rates for acquisition and construction financing .

## GETTING STARTED.

### 3. EVALUATING THE SELECTED SITE.

After your project is pre-qualified, you and our ownership, as resources and partners, will schedule a site visit to look at the land in further detail and understand what is needed to develop the site. This evaluation might include tasks such as tree removal, putting in a temporary driveway for construction vehicles, remove underground rock, slope stabilization, topographical survey, Geological Reports or Slope Band Analysis etc. Because every site is different, the requirements and associated costs will vary from project to project.

This is also the opportunity to decide where on the land the project will be situated. The Architect and us will consider factors such as view from windows, orientation to the street, sun exposure, wind patterns, accessibility and privacy considerations will help guide this decision. After the site visit, our team will provide a list of the site development tasks, a preferred list of consultants and suggestions on next steps. At this stage, we would agree a Pre-construction agreement to oversee the design and permitting process to get you ready to start construction.

### 4. DUE DILIGENCE.

Once in escrow, we undertake detailed site due diligence with a team of consultants to review more detailed planning, massing (overall size of structure onsite), height restrictions, geo, engineering, structural, existing conditions or remediation works, site drainage and utilities as well as preliminary estimates for build costs in order to further reinforce the underwriting process and project value.

## PROJECT MANAGEMENT

### After you close.

Not everybody has time to manage all the details of building a project of high end nature. With Blackbriar's Turn Key PM Role, we add a high level of customer service and project management to oversee the design and construction process so you can spend your time on more important things.

Now that you have closed escrow on the project, things become more serious, we start evaluating your land in much more detail to determine the site development requirements and gathering costs. We also help appoint and manage the right design team to develop full construction documents ready for permit submission and hard pricing.

#### ***We coordinate and secure the following:***

- Temporary water and power requirements
- Excavated building pad or initial grading package if required
- Making applications for connections to permanent utilities
- Reviewing and agreement of contracts with consultants
- Production of the design schedule with the design team
- Providing advice on amenities required in the project to add value
- Review and assessment of SF usage, maximizing space and constructibility review of design details
- Provide cost estimates for site development and a plot plan
- Visit the building jurisdiction and verify the important characteristics of your site

#### ***Owner Responsibilities***

- Signature of Pre-Construction Agreement and Terms
- Signature of Consultant Contracts for Design Services
- Consultant with design team and agree project orientation
- Understanding the site-development tasks and ensure funding is in place for the required tasks.

## PROJECT MANAGEMENT

### 5. PRE-DESIGN PHASE.

Following Acquisition and Team appointments, we work with the team of trusted and reputable consultants and design professionals to develop the design documents to a level which is ready for market and ensures cost certainty for our clients.

Pre-design is an information collection phase that will be the grounds for the design phases to follow. The main goal of this phase is to attain as much information possible about you, the client, and your personality, lifestyle, project desires. This will then determine how much space you will likely need in the future, and how that space should be utilized, organized, and disseminated. This information is gathered into a document called the Project Program, which details all the spaces for the project, their sizes and any specific qualities or unique features you are looking for.

The other part of the re-design phase is observing and documenting the existing conditions at the project site. This usually entails a more detailed survey of the land to determine the property line locations and/or measurements of any existing structures.

The design team will also do background research to better understand how the site relates to the surrounding area, climate, people, and the regulations that affect the project. Majority of Architects and the design team members we collaborate with will track these regulations in a Zoning Summary document and liaise with city planning staff if any questions arise.

As the client, you will be very involved and expected to answer a lot of questions during this phase. We sometimes give "homework" assignments to get to know your desires better. Collaborating in this way allows the designer / architect to better understand your values and needs, resulting in a design that reflects you as the individual with optimal functionality.

**PD Deliverables:** Program, Zoning Summary, Existing Condition drawing(s)

**PD Duration:** usually 2-4 weeks

## 6. SCHEMATIC DESIGN PHASE.

In this phase, the architect will begin the process of translating the Program into an efficient building design. This is when the team start exploring design concepts. This will be a time for testing options and getting a general idea of the look and feel. The floor plans and shape of the project will begin to take form, but the specifics about materials and details will come later.

The Schematic Design phase includes several meetings where the design team present their ideas using images of other projects, hand sketches, and models to help visualize the size, shape, and relationship of spaces to each other. The Design team should always be attentive by listening and observing your reactions, then refine the ideas according to your feedback until we reach an agreed upon design direction to develop further in the following phases.

As the client, you will be expected to be engaged throughout this phase and to be asked for your approval of the Schematic Design before any work proceeds. Make sure to let your design professional know if you want clarification on something if need be and take the time necessary to give thoughtful feedback. It is always possible to make changes later, but it is easiest during this phase when the design is most fluid.

**SD Deliverables:** Preliminary Site and Floor Plans, Preliminary Exterior Concept (if applicable)

**SD Duration:** usually 3-6 weeks (depends on size and complexity)

## 7. DESIGN DEVELOPMENT.

During Design Development, the Architect will advance the design significantly based on the floor plan and exterior concept approved in the previous phase. The first priority of this phase is to define and develop all the important aspects of the project. Secondly produce a set of drawings and outline specification to show your contractors for preliminary cost estimating. If adjustments are necessary to bring the project scope in line with the construction budget, it is most efficient to do as part of the design development phase of work. Once the architect knows we are on track and we have appropriate contingencies set, they will discuss more specifically about the interior and exterior materials and functionality. As they finalize the layout of the indoor and outdoor spaces,

## PROJECT MANAGEMENT

### 7. DESIGN DEVELOPMENT. *Continued*

they will refine the window and door placements and make adjustments to the building form. This is when the clients usually feel the project coming to life and it becomes possible for them to see how the spaces work coherently. By the end of the Design Development phase, the building exterior will be more fully designed, the interior layout completed, dimensions of all spaces finalized, and most materials selected. At this point, the structural engineer will be introduced to the team, and consultants for lighting, landscaping, HVAC, plumbing, and electrical systems may be needed depending on the complexity of the project. The deliverables will be a more detailed set of drawings that communicates the overall layout, details and sections and volume of the building or space, all significant equipment, and the type of material or finish for every surface of the project.

While you're in this design process, you will work with the design team to and choose your finishes from a selection of options provided by the interior designer. For many people, this is an exciting time, because it is when you can see the vision for your new home starting to come together.

We work diligently to provide the pricing for all of the options you may want, while working closely with you to stay within your budget.

#### ***This is your opportunity to select features such as:***

- Cabinets and hardware
- Stones and countertops
- Flooring
- Plumbing fixtures
- Appliances
- Other decorative hardware
- Paint colors and wallpapers
- Tile color, type and pattern style



### ***Builder Responsibilities***

- Provide Value Analysis Solutions to help ensure best value and budget are met
- Issue DRAFT Contract for review with the client

### ***Homeowner Responsibilities***

- Decide which finishes to include in the home
- Review and confirm Terms of Contract are acceptable

**DD Deliverables:** Drawing Set and Outline Specification document

**DD Duration:** usually 3-8 weeks

### ***A Note on When to Start Interior Design***

This varies from project to project. In many cases you're not 100% sure what the city will approve and what comments they will have in the Planning and Plan Check Process so it might be more feasible to wait before you plan the details of the full interiors. We recommend doing Schematics and Design Development Interiors up front and selecting finishes and color schemes first, but not proceeding with the design of the full Interior Elevations, sections and details (CDs) until you have your first round of corrections from the city. This way you can avoid redesign, as it can get costly, and ensure the elevations and details only have to be drawn once.

### ***A Note on Cost Contingency***

Typically, we suggest you start with a 20% contingency on all costs, this should get worked down to 10% going in to construction. It reduces at each stage, 20% at SD, 15% at DD and 10% at CDs is what we would recommend.

### ***Constructability Reviews***

During the design development stage, Blackbriar will be very involved in reviewing your drawings. We will provide a review of all details and engineering and provide feedback on details, what can be done, what might be inefficient and what can be improved or Value Engineered to ensure best value for the build.

# PROJECT MANAGEMENT

## 8. CONSTRUCTION DOCUMENTS

In this phase the architect and interior designer will develop the Design Drawings into a thorough and precise set of Construction Documents. These drawings and specifications have all of the details, dimensions, and notes necessary to communicate with the entire design intent to the builder. The architect should detail how the building components should be connected, specify all of the materials, finishes, fixtures, equipment, and appliances to be installed, and coordinate the drawings with the structural engineers and any other consultant drawings. The Construction Documents phase is often the most time consuming, which can surprise clients because the design seems complete after Design Development. However, this is a critical step in the process of successfully and accurately executing the design you, as the client, have invested in. Early in this phase, there may be items that are open for options. You, as the client, should still be prepared to make decisions during this phase. It's the architect's responsibility to make recommendations and educate you about the options, but ultimately you, as the client, will be the one occupying and maintaining the home or building and ultimately, it is your decision.

**CD Deliverables:** Drawings and Specification for Construction

**CD Duration:** usually 5-12 weeks

## 9. BUILDING PERMITTING

Every new home requires a building permit, and depending on where the home is located, there may be other approvals required from homeowners associations, architectural reviews or other requirements. Although it may seem rather restrictive, the permitting process exists to keep homeowners safe by ensuring that the home meets minimum code requirements. Remember: The team is there to support you during this process, so if you need assistance, we are here.

During this phase the architect will add to the drawings any additional information required to acquire a building permit. This is the information needed to show the project complies with the applicable land use, building, and energy codes, and any other applicable guidelines and regulations required by the city or jurisdiction issuing the permit. We

work with the architect and expeditor (if appointed), to submit the drawings along with the various forms required for the permit application to the local plan reviewer, monitor the progress during the review period, and give additional information or clarifications as requested. Nothing is required of you, the client, during this phase—except patience. The goal is to shepherd your project through as quickly and as painlessly as possible, but the length and cost of this phase can vary vastly depending on the jurisdiction, complexity of the project, and any special historic district or community design review processes.

### ***Builder Responsibilities***

- Guide the homeowner through the permitting process as needed
- Coordinate with the expeditor and architect to ensure information is being provided in a timely manner

### ***Homeowner Responsibilities***

- Work with the jurisdiction, architect and expeditor for approved building permits and answer any owner related inquiries
- Pay the Fees required to submit

The amount of time it takes to receive permit approval will vary depending on the permit type and the local permitting process. Some jurisdictions can process permits in a relatively short period of time, while others have a longer wait time. Although obtaining a permit for a new home is often as simple as submitting the application and receiving approval, the process might also include responding to questions or meeting with the local permitting department.

**BP Deliverables:** Drawings and Forms for Building Permit Application

**BP Duration:** usually 12-24 weeks (varies widely)

### ***A note on level of detail needed to submit to the city***

Depending on the jurisdiction, more or less information needs to be submitted to communicate the buildings shell and core and demonstrate the plans comply with code. Often, if you're trying to move fast, we recommend submitting a set which is not quite 100% CD level as this allows the final detailing to be done while in plan check and your updated information to be added after the first round of corrections are issued which typically takes around 6-8 weeks. If you're looking to move quickly through the city, we recommend using a plan check expeditor who has a relationship with your local jurisdiction.

## PROJECT MANAGEMENT

### 10. PRICING FOR SUCCESS

Blackbriar will facilitate in finalizing your budget at each step of the project. We will provide a budget update as part of the Pre-Construction Services at the end of Schematic Design, Design Development & Construction Documents Phases of work.

After the design is approved, the next step is finalizing the estimate into a "Hard Bid." This is your opportunity to review the final project budget and make a decision whether to move forward or make additional changes. After this point, alterations in the design cannot happen without changing the budget, so it is critical for you to be sure that it is the design you want and that it meets your budget goals.

Blackbriar will work with you to amend the estimate and final numbers based on the final scope agreed, so that we can start construction with as much cost information as possible. This will ensure the project can be delivered inside of your budget & schedule goals.

#### *Builder Responsibilities*

- Sit down and review your Floor Plan to ensure that it includes everything that you want
- Advise on final costs and scope to ensure the budget is acceptable
- Work with the Owner to agree the final contract terms for time, cost and quality expectations

#### *Homeowner Responsibilities*

- Sign off on your completed floor Plan so we can move on to the next stage
- Execute the contract for the GC to mobilize and commence work

**Deliverables:** Drawings and Specifications for Bidding

**Duration:** usually 3-6 weeks

## 11. MEETING AND INTERVIEWING YOUR TEAM

As part of the agreement of the final contract, Blackbriar will propose a team for your project. Typically, this will include a Project Manager and a Superintendent for the works. Depending on the size of the project, there may be a need for an assistant PM, or a Project Administrator to support the processing of payment applications. This will help ensure the costs are brought out quickly and efficiently. Typically, we will hold a Pre-Construction Site meeting with you with the full team present who is dedicated to the project so we can outline workflow, lines of communication and site set up work required to ensure the project is a success.

### *Builder Responsibilities*

- Pull your Building Permit
- Talk through the site development steps, construction stages and your responsibilities throughout the building process.

### *Homeowner Responsibilities*

- Acknowledge understanding your requirements during the site development and construction process.

### *Services Provided by Blackbriar during construction*

Blackbriar operates completely different from any other builder in the world during construction. We operate at the highest level of skill and precision. This starts with an initial intense study of the plans while we are starting the first portion of the works. This means unturning every stone and looking for issues which might affect the construction down the line. A deeper constructibility review will be performed so we can flush out any issues early.

Blackbriar will also introduce to you our custom construction document management software program, Procore, for the project. This software will be fully accessible to you as the client and provide full access to the financial health of your project. It allows you to track and impact of change, see in real time interaction we are having with the architect to gain additional information. It will show you the schedule for the works or master construction schedule, any constraints and provide access to daily logs of those who are onsite and what work was performed. For more information on client access and Procore, the following link provides a useful guide. ([Procore Construction Software 5 Minute Overview](#))

## PROJECT MANAGEMENT

### *Technology Continued*

Blackbriar uses cutting edge technology to map spaces with Lidar (3D Scanning of the spaces) technology, and when available we can interact with the architect and team to update the Revit model to incorporate changing existing conditions. We also use a program called Navisworks to overlay Mechanical, electrical and Plumbing to help coordinate ceiling work for clash detection and avoidance in building modeling. You might see this as complicated but we will navigate you through the process.

### **12. CONSTRUCTION ADMINISTRATION BY ARCHITECT AND ENGINEERS.**

While most of the Architect's work is done before any building begins, consistent presence during the construction phase is equally as important. During this phase, the Architect, Structural and Civil Engineer are expected to be visiting the jobsite at regular intervals to answer questions from Blackbriar and proactively address potential issues. The frequency of site visits could be weekly or monthly depending on the project and your needs, but it is vital to have them keeping an eye on things to ensure the finished project meets your expectations. Inevitably, there will be a time when some decisions must be made or modified in the field. The Architect and Interior Design teams involvement and ability to work quickly with Blackbriar to resolve these problems as this essentially for helps you avoiding costly delays and change orders. During Construction Administration, the Architect's role is as an advisor to the owner. At their site visits, we encourage the Architect to take photos and write field reports to document the progress, confirm the materials and workmanship are of the quality you agreed to, and review our billings accurately reflect the amount of work completed. At the end of the project, we help you develop your final Punch List to ensure all work is completed to your satisfaction.

**CA Deliverables:** Field Observation Reports

**CA Duration:** concurrent with construction time frame

### **13. CONSTRUCTION ACTIVITIES.**

During construction, the specific steps will vary depending on the project needs and the site features, but initial tasks might include clearing the site, coordinating the excavation, installing a septic system, LID planter install, connecting to local utilities, hillside concrete piling and foundations, temporary shoring, pool excavation and rebar work, basement excavation and waterproofing, etc.

#### ***Builder Responsibilities***

- Manage the site-development process
- Site up the systems and workflow for the project
- Set up trailers, toilet, fencing, shoring to ensure a safe site
- Contract the Initial set of Sub-contractors or direct labor for the work
- Respond to the homeowner's site-development questions as needed

#### ***Homeowner Responsibilities***

- Coordinate with your Contractors to perform the necessary site work
- Attend Bi-Weekly meetings and make decisions
- Complete individual site-work tasks when possible

After site set-up has been completed, the Construction team verifies the site is ready for construction, and starts the initial foundation work to begin building your new home. At various intervals during construction process, you and the Construction Superintendent will walk with the Architect and undertake inspections to see what has been not been initiated, what is in progress and what has been completed. This is your opportunity to raise questions or discuss any potential issues with the build process.

The Construction Superintendent will walk you through the inspection process and verify that the construction team is installing the finishes you selected. You will also verify details such as the kitchen-cabinet layout, ceiling heights, flooring transitions, and finish details. Actively participating in the inspections ensures the final product will meet your expectations.

## PROJECT MANAGEMENT

### 14. CLOSEOUT, COMMISSIONING AND HANDOVER.

When your new home is substantially complete, you will be asked to do a pre-walk with the construction superintendent to create what is called a "Punch List." This is the list of tasks that need to be completed before you move in, so pay close attention to every detail as you walk through the home. This is your chance with the Construction Team to catch any errors or incomplete items. If you find something needing to be fixed, changed or perfected, putting it on the punch list ensures it will be addressed so there are no assumptions or miscommunications.

#### *Builder Responsibilities*

- Complete final customer responsibilities during construction for the home's completion.
- Identify items that need to be completed prior to moving in

### 15. FINISHING OUT YOUR HOME.

The Team needs time to complete the items on the punch list before your home orientation and the hand-over of the keys. The home orientation consists of a final walk through of the home, an Owner and Operations Manual (O&Ms) for all of the new systems in the home, and enrollment in a warranty program. This is your time to learn how to maintain your new home, so make sure you closely review the instruction packets and ask questions if anything is unclear.

#### *Builder Responsibilities*

- Perform all punch-list items
- Walk the homeowner through all the new systems
- Enroll the homeowner in a warranty program
- Issue the O&M Manual

#### *Homeowner Responsibilities*

- Ensure that all punch-list items are complete
- Review manuals to understand all new home systems
- Ask questions about home maintenance
- Obtain a certificate of occupancy



# About Blackbriar Development

Working with Blackbriar as your partner allows you to benefit from over 25 years of experience and many new homes built for satisfied discriminating homeowner VIP clients. Our team can help you navigate every step of the way to turn a daunting process into a delightful one.

Request a consultation with us at our main office on Sunset Blvd in Beverly Hills today to learn more about why we are the leaders in our industry for high end projects, the value we bring to every project, and some insight in to how your project will be managed with vision, care and refined craftsmanship. On your first call, we will provide construction recommendations for the project you have in mind and will help you determine if Blackbriar is the right fit for you.

**Let's connect.**

We'd love to discuss your project. Visit [BuiltBlackbriar.com](https://www.BuiltBlackbriar.com).



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