

# PLANNING GUIDE

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## **1. Family Description**

The Family Description helps define potential design priorities for your home. Primarily you should describe your family's habits, hobbies, activities and personal preferences that may inform the design of your home. Consider the following topics when describing your family, but do not limit yourself to these topics, they are simply a guide to get you started. You do not need to answer all of these questions or any of these questions if they do not apply. Use the blank pages provided at the end of this guide for additional input.

### **Sample Topics:**

1. Where do you spend most of your time?
2. Do you need a home office or bring your work home regularly?
3. Does your job require anything specific in the home?
4. What are your family's hobbies and how might that affect design?
5. Do you intend to have any special exterior spaces, pool, and gazebo?
6. Do you need a guest room and adjacent bath?

7. How would you share rooms, bathrooms, etc, are there any potential conflicts to be resolved?
8. Do you intend to have a work or storage area in the garage?
9. Are you a particularly private person? How about the rest of your family?
10. Do you need a quiet place to escape or nap?
11. Do you entertain regularly? Formally or Informally?
12. Is yours the home where all the neighborhood kids spend a rainy afternoon?
13. Which rooms do you seldom use?
14. If you have children living at home, how will their needs change as they grow older?

15. Do you need a separate, formal Living Room?

16. Any additional information?

## 2. Project Information

### A. Square Footage Calculations

Square footage is determined by four main categories:

**Interior conditioned area:** Interior square footage represent heated/cooled floor only and do not include two story or vaulted spaces, garages, bonus rooms, covered porches or any other unfinished areas. These measurements are from the outside face of the stud.

**Interior unconditioned area:** This would include items such as a garage, an unfinished basement and any storage or utility rooms that are not included in air-conditioned area.

**Exterior covered area:** Covered porches and decks.

**Exterior uncovered area:** Open decks and patios.

### B. Establishing your Program

This section allows you to make programming selections that will determine the make-up of your home. The list below shows the standard rooms and sizes to calculate typical square footage requirements.

Circle the necessary rooms and size, then multiply the number together and write that number under “square footage”. The numbers shown below represent typical room sizes, however, if you have an alternate room dimension, just write the desired length and width next to Size C and calculate the square footage. After you have calculated all of the numbers add **20%** to the subtotal for circulation secondary areas. This is your estimated Total Square Footage Requirement.

#### Interior Finished Areas

Room	Size A	Size B	Size C	Square Footage
Foyer	6 x 10	8 x 10	10 x 12	_____
Living Room	10 x 12	12 x 12	14 x 14	_____
Dining Room	12 x 12	12 x 14	14 x 16	_____
Kitchen	10 x 12	12 x 14	14 x 16	_____
Breakfast	8 x 10	10 x 10	10 x 12	_____

Great Room	15 x 15	18 x 18	21 x 21	_____
Study/Library	10 x 12	12 x 12	12 x 14	_____
Home Office	10 x 12	12 x 12	12 x 14	_____
Powder Room	5 x 5	6 x 7	7 x 8	_____
Laundry	6 x 6	8 x 7	8 x 10	_____
Storage	5 x 6	7 x 8	9 x 10	_____
Master Bed.	15 x 15	16 x 18	18 x 20	_____
Master Bath	9 x 9	10 x 12	12 x 14	_____
Master Closet	5 x 7	8 x 10	12 x 12	_____
Bedroom 2	10 x 12	12 x 12	14 x 14	_____
Bedroom 3	10 x 12	12 x 12	14 x 14	_____
Bedroom 4	10 x 12	12 x 12	14 x 14	_____
Bedroom 5	10 x 12	12 x 12	14 x 14	_____
Bedroom 6	10 x 12	12 x 12	14 x 14	_____
Bath 2	5 x 8	5 x 10	6 x 12	_____
Bath 3	5 x 8	5 x 10	6 x 12	_____
Bath 4	5 x 8	5 x 10	6 x 12	_____

Other Rooms	Approx. Size	Square Footage
Solarium	_____	_____
Sewing Room	_____	_____
Bonus	_____	_____
Media Room	_____	_____
Recreational Room	_____	_____

**Subtotal**

Add a 20% circulation factor: \_\_\_\_\_ **TOTAL:**

\*Square Footage can easily vary 10% or more depending on overall layout.

**Unfinished Areas**

Room	Approx. Size	Square Footage
Garage/Carport	_____	_____
Storage	_____	_____
Workshop	_____	_____
Basement	_____	_____

TOTAL:

**Exterior Areas**

Room	Approx. Size	Square Footage
Front Porch	_____	_____
Rear Covered Porch	_____	_____
Deck/Patio	_____	_____
Screened Porch	_____	_____

**TOTAL:**

\_\_\_\_\_

The initial programming list above represents the features your home will include as well as the projected total square footage.

**C. Defining your Requirements**

The following questions will help further define the type of home you are looking for.

**1. How many levels?**

One Story, Two Story, Split Level, \_\_\_\_\_  
please specify type: basement/cellar \_\_\_\_\_

**2. List ceiling heights**

First Floor	_____
Second Floor	_____
Basement	_____
Attic	_____
Great Room	_____
_____	_____
_____	_____
_____	_____

**3. Based on the information on the previous pages:**

Will one of the bedrooms be used as an office? \_\_\_\_\_  
Will the bonus room serve as a future bedroom? \_\_\_\_\_

**4. What types of closets are important in your secondary bedrooms, walk-in (4'x5') or standard (2'x5')?**

**5. Do you plan to have separate formal and private areas in your home? If so please explain?**

**6. Describe ceiling designs for specific rooms?**

<b>Ceiling Type</b>	<b>Room(s)</b>
Tray ceiling	_____
Pan Ceiling	_____
Vaulted Ceiling	_____
Higher Ceiling	_____
What height?	_____
What height?	_____
What height?	_____

What height? \_\_\_\_\_

- 7. Please circle any optional amenities and add them to the chart on the next page.**  
 If there is an amenity that you would like to incorporate into your home that is not listed below, please describe.

Patio/Deck	Fireplace(s)	Island in Kitchen	Front Porch(s)
Gas Grill	Seating in Kitchen	Overlook Balcony	
Bookcases	Display Shelves	Laundry Shoot	
Standard Shelving		Cabinets	

- 8. Select from the following floor finishes and add to the chart on the next page.**  
 IF there is a floor finish not listed, please list and describe.

Hardwood Floors	Ceramic Tile	Vinyl Tile	Carpet	Concrete
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- 9. Following is a list of standard amenities found in modern kitchens, please choose from the list below and describe the important features you would like to incorporate.**

Island	Pantry	Seating Area	Lazy Susan	Undercounter Lighting
Wine Rack		Large Drawers	Small Drawers	Glass Doors
Open Shelving				

**D. Summary of Individual Requirements and Amenities**

Please list each room and the appropriate amenities you would like to incorporate, be sure to underline important issues.

Room	Floor	Location	Amenities	Floor Finish
ie: Great Room 1st		Rear of Home	Fireplace, Display Shelves	Hardwood
Foyer	_____	_____	_____	_____
Living Room	_____	_____	_____	_____
Dining Room	_____	_____	_____	_____
Kitchen*	_____	_____	_____	_____
Breakfast	_____	_____	_____	_____
Great Room	_____	_____	_____	_____

Study/Library				
Powder Room				
Laundry				
Garage/Carport				
Storage				
Master Bed				
Master Bath				
Bedroom 2				
Bedroom 3				
Bedroom 4				
Bath 2				
Bath 3				

\*If necessary, take additional space to describe the kitchen in further detail.

**E. Describing your Requirements**

Describe the overall feel for the interior of your home. Describe any room in which you want to include certain features or amenities (ie: master bath, Include a large whirlpool tub, with separate shower and enclosed room for water closet, two vanities with sinks, large linen closet and walk-in closet from bath, also include windows and skylights).

### 3. Adjacencies

In addition to selecting appropriate spaces to include in your home, you must decide upon adjacent locations for important rooms. Please list Primary, Secondary and Not to be adjacent conditions. This is where you begin to adapt the program of the house to your specific needs.

There are three categories to use while prioritizing your adjacencies:

**Primary Adjacency:** This would constitute an adjacency that you determine to be critical to the success of the design of your house. A typical primary adjacency would be Dining Room/Kitchen.

**Secondary Adjacency:** This is something that you believe would improve the quality of your home but may not be critical to the success of your home. This is a good time to think about your personal habits and preferences. If you enjoy reading late at night, but don't want to keep everyone up, a secondary adjacency may be Master Bedroom/Study.

**Not to be Adjacent:** If there are rooms you would not like to have adjacent to each other please indicate so in the appropriate section.

Start by resolving the Primary and Not to be Adjacent categories first and then working on secondary adjacencies. Completing this section will be crucial to the success and appropriateness of any design.

#### **Primary Adjacencies:**

ie: Kitchen to Dining Room

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.
- 7.
- 8.
- 9.

#### **Secondary Adjacencies:**

ie: Master Bedroom to Study

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.
- 7.
- 8.
- 9.

#### **Not to be Adjacent:**

ie: Master Bedroom to Secondary Bedrooms

- 1.
- 2.
- 3.

- 4.
- 5.

#### **4. Exterior Style and Type**

Architectural styles and types can range from the intuitive organic architecture of a prairie home to the simplicity of a coastal cottage. Below is a list of several types of architectural styles, please select one that represents your family and interests and describe the different characteristics you are looking for. Also, Include any photographs or sketches that will reinforce the idea of your stylistic preferences.

##### **Historical American Styles and Types**

Popular throughout the eastern United States these historical styles reference a variety of regional preferences including the architectural vocabulary of Colonial, Georgian, Federal and Victorian designs.

Victorian	1880-1910
Cape Cod	
Southern Coastal	1880-1920
Georgian	1720-1800
Colonial American	1780-1860
Williamsburg Colonial	1930-1990s
Salt Box	
Country Farmhouse	
Neo-Victorian	1980-1990s

##### **European References**

(often referred to as Traditional)

Popular in the US beginning in the 1920's these European influenced styles have evolved to reflect the varied tastes of many upscale developments across North America.

Traditional	1980-1990s
French Provincial	
English Country	
Italian Villa	1840-1880
Tudor	1890-1930
Neo-Tudor	1960-1990s

##### **Mediterranean Southwestern / Floridian**

Based from Spanish, Spanish Colonial and Italian Renaissance architecture the Mediterranean Styles typically offer tiled roofs, stuccoed walls and landscaped courtyards. Prevalent in the former Spanish Territories of Florida, the Southwest and California.

Spanish Mission	1890-1920
Italian Renaissance	1845-1870
Pueblo	1900-1990s
Neo-Mediterranean	1970-1990s

##### **Contemporary**

Widely misdescribed, a "Contemporary Home" has evolved to refer to a variety of vague conditions including any style that features an open plan, however most design professionals consider true

contemporary styles to include buildings that reflect an innovative or distinctive use of materials and design. For our purposes we have included the following styles.

International Style	1930-1990s - Le Corbusier
Miesian	1950-1965 - Ludwig Mies van der Rohe
Prairie Style /Wrightian	1900-1960 - Frank Lloyd Wright
Post Modern	1960-1990s

### **Vacation**

Vacation Homes range from a simple cottage designed for the lake in the woods to a Post and Beam log home with open rafters nestled in a mountain setting.

Cottage  
Post and Beam  
Log Cabins

### **Other Styles and Building Types**

Other styles might include the distinctive Craftsman Style popular in Southern California in the 1920's or perhaps Ranch Style which is actually more a type than a style.

Craftsman	1900-1930 - Greene Brothers
Ranch Type Home	1950-1970
American Vernacular	1980-1990s

## **Describe Your Exterior Style**

### **5. Site Conditions**

#### **A. Foundation Options**

The slope or terrain of your proposed site can serve as one of the most important factors in determining the type of foundations appropriate for your home. For example, in building a home on a slab foundation you would typically look for a fairly level lot or appropriate building site to minimize the amount on cut and fill that might otherwise be required. Listed below are typical foundation types, circle the foundation you require.

#### **1. Basement**

If you are interested in a basement foundation, look for a lot that slopes down from front to back or from side to side. A lot which slopes up from front to back can be more difficult and expensive because you have to allow for excessive steps or fill to access the front door. If specifying a basement, please answer the questions below.

- a. Walk-out daylight basement or cellar type
- b. Finished or Unfinished

## **2. Slab Foundation**

To utilize a poured concrete slab foundation type, make sure the site can be properly graded to be relatively flat, typically a 1 to 2 foot drop off from one side to the other, while still accommodating for positive drainage away from the home. A slab foundation is often the simplest and least expensive option and consists of a poured concrete surface with a thickened or turned-down perimeter and additional depth added under load bearing interior walls.

## **3. Crawlspace Foundation**

If your lot slopes from 2 to 5 feet across the building site, a crawlspace foundation might be appropriate. A typical crawlspace foundation consists of a concrete block stemwall approximately 3 feet tall that continues around the perimeter of the home with structural piers located under load bearing points of a wood framed floor system.

## **4. Raised Slab Foundation**

Another option to a crawlspace foundation is a raised slab foundation. This can be more cost effective because of the cost of wood in a floor system. Construction consists of a concrete block stemwall approximately 3 feet tall that continues around the perimeter of the home that is reinforced with concrete and steel, the interior area is then backfilled with sand and a concrete slab is poured as the floor system.

## **B. Selecting a Building Site**

Just as in designing a home, selecting a building site for your family can be a serious decision. Real Estate agents tell us one of the most important factors in choosing a lot is the general location or neighborhood. Important factors include, adjacent property values, local communities, schools, churches, shopping, views, lakefront access and proximity to your work place. Even if you do not have school age children, the resale and retained property values of a quality school system will effect the value of your home for many years to come.

### **1. Subdivision Requirements or Restrictive Covenants**

Are there covenants or building requirements in the subdivision you are considering such as, appropriate usage, exterior materials/colors, roof pitches, garage access, etc..

### **2. Setbacks**

Be sure to allow for front rear and side setbacks when designing the width and length of the home. Also allow for an appropriate driveway, (about 10 feet wide) and if necessary, room for a turn-around area (30 feet from side-entry garages)

### **3. Easements**

Are there any utility or drainage easements that could limit the use of the land? Easements usually exist along the rear or side of a lot to allow for power, telephone, gas lines or storm-water access. Typically you can not build within this area, consult your local planning department for further information.

#### **4. Flood Plain**

Before purchasing your lot, check with the local zoning department to verify that the proposed building site is not restricted by a flood plain or other natural encumbrance.

#### **5. Special Requirements**

Such as additional parking spaces, detached garage or other structure, area for boats or recreational vehicles. Do you plan on installing a swimming pool, tennis courts, stables, gazebo or any other outdoor living areas? Check local codes and subdivision restrictive covenants for specific information.

#### **6. Privacy**

Homes that slope up from the front to back or sit up on a hill, offer more privacy than those that slope away. "L" or "H" shaped plans often help create private areas from adjoining properties. Fences, trees and hedges also offer a sense of privacy.

### **C. Designing for your Site**

Site conditions can have a profound impact on the way your house is designed. Please be as specific as possible with all of these questions. A site diagram which maps distinguishing features can be very helpful.

#### **If you already have your site:**

1. Describe the dimensions of your site including width and depth.
2. If applicable, list the maximum width and/or depth for your home?
3. List any requirements concerning garage entry, for example, front, side or drive-under access.
4. Are there any physical features (slopes, rocks, trees, waterfront, etc.) that might affect the design?

5. Are there any setbacks or zoning constraints that will affect the placement of the building?
  
6. Are there any desirable or undesirable views to take into consideration?
  
7. You can also include a photo of any distinguishing features and plat map of your site with this application.
  
8. Include a site plan, if available.
  
9. Indicate any additional information regarding the site which you feel may impact the design.

## 6. Summary

Once you have completed the previous sections, including Square Footage Calculations, Establishing a Program, Defining Requirements, Describing Features, Adjacencies, Exterior Styles and Site Conditions, you have established a comprehensive list of criteria necessary to effectively assist in the design of a new home or select from existing plans that might meet your specific needs.

## 7. Family Profile

If you are designing a new home the name of record should be the primary contact for the project. This will be the person contacted on a regular basis, so it may be helpful to choose the most accessible family member for the primary contact. Additional family member information should include any planned family additions or live-in relatives that may vary while you are in this home.

Name \_\_\_\_\_

Spouse Name \_\_\_\_\_

Home Telephone \_\_\_\_\_

Home Address \_\_\_\_\_

City \_\_\_\_\_

State \_\_\_\_\_ Zip Code \_\_\_\_\_

Company \_\_\_\_\_

Work Address \_\_\_\_\_

City \_\_\_\_\_

State \_\_\_\_\_ Zip Code \_\_\_\_\_

Spouse Company \_\_\_\_\_

Work Address \_\_\_\_\_

City \_\_\_\_\_

State \_\_\_\_\_ Zip Code \_\_\_\_\_

**Additional Family Member Name**

**Age**

**Relation**

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