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S E R V I C E S

The facility-related concerns and needs of clients occur throughout the building life cycle stages of planning, design and construction, and operation. By the nature of their core knowledge and expertise, architects are in a unique position to address client needs that go beyond the creation of physical space. By selectively expanding their knowledge base and skills, architects can position their firms to offer a broader range of services that are responsive to client facility needs and consistent with the strategic aims of their practices.



16 Defining Services

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Part 1 of the Handbook, which focuses on the client, strives to help us better understand who it is we work for. Parts 2 and 3, on business and delivery, address operational issues on a firm-wide and project level. This part addresses the what and how of providing services to our clients.

A fundamental concept of the 13th edition of the *Architect's Handbook of Professional Practice* is expansion of architectural services in recognition of the concept of the facility life cycle and the potential of long-term client relationships. To accomplish this, architects must “think outside the box” of traditional design and construction services. The *Handbook* thus presents services in the spirit of *adding to* versus *taking away from* the architect’s strong tradition of design and construction service capabilities. Architects can leverage their core capabilities by adding new skills, and present themselves to clients as professionals interested in opportunities that go beyond design and construction.

With the information provided in Part 4, a firm can begin to enhance the services it already provides, create a set of new capabilities, or both. Although the services included are diverse in nature, each is presented on an equal basis, without predilection toward any particular capability or set of capabilities.

THOUGHTS ON EXPANDING SERVICES

To use Part 4 effectively, you should have a definitive grasp of the markets your firm serves and who your potential clients should be. Give considerable thought to the impact a new service will have on the firm as a whole and on the people serving individual markets and clients in particular. For example, what happens when facility management services are introduced to a firm providing interior services? When is a move plan that is part of move management services and includes some space planning distinct from space planning alone? Who does what? The addition of a seemingly innocuous capability can have significant firm-wide impacts, from marketing through client retention.

Before a firm selects a new service or line of services for implementation, it is advisable to understand what the firm’s present capabilities and capacities are. This way you can develop implementation costs and time frames that will help you determine potential cost/benefit scenarios before making an investment. Internal staff can be polled for interest in learning new skills, technology can be assessed to determine new requirements, and the firm’s organization can be assessed to determine where the new service would fit in. Once these issues have been addressed, undertake a strategic thinking process that includes SWOT analysis (assessment of strengths, weaknesses, opportunities,

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▶ “The concept of architectural services now extends through the conception, financing, design, construction, and lifetime operation of a facility to include every facility-related aspect that makes the client’s life better and more productive.”

*AIA Project/Service Delivery
Think Tank, July 1999*

▶ **Identifying Target Markets (4.1)** speaks about the importance of understanding target markets and the clients within those markets.

Firm Identity and Expertise (6.1) looks at how firms can identify their true driving forces and expertise.

and threats) to determine where you would be in the marketplace. This study will allow you to make a fair determination of market value and return on investment.

Be honest with yourself and admit what you do not know. The *Handbook* is, after all, about the practice of architecture, and architects characteristically believe they can do just about anything. Recognize that certain processes and technologies have become specialties in this profession of generalists. Leading-edge thinkers and doers in the industry have already spent years practicing many “new” services discussed here and possess the mind-set (and battle scars) to hit the ground running. When developing a business plan to implement a new service, consider learning from these professionals or hiring one to leapfrog the competition.

One caveat (of many) in establishing a new service within a firm: Allow it to grow and flourish within the organization. Easy to say, hard to do.

A Work in progress. This Services section is intended to be a work in progress. A study performed several years ago by the American Institute of Architecture Students resulted in a list of more than 600 possible services that could be performed by individuals trained in architecture. Here we present a small number of service processes that are most generally accepted. As the concepts involved in expanding architectural services through the redefinition of architecture are better understood, many additional services will be issued in later releases of the *Handbook*. Sources for these services include practitioners, professional interest areas (PIAs), and previous *Handbook* authors. Each service supports the basis for the redefinition of architecture and is intended to enable firms of any size to expand their client relationships, capabilities, markets, and profitability.

The B141 document. The current B141 Document, Standard Form of Agreement Between Owner and Architect with Standard Form of Architect’s Services, was created to enable architects to respond to client needs without having to use a multitude of contracting instruments. The format of each service description is therefore intended to help architects develop

modular inserts for the B141. This document makes it possible to view services discretely as adding value and to have them on the table during the discussion of fees. For example, tradition has often relegated programming to a low-margin or free service in order to gain entree for providing design services. This approach runs counter to sound business practices. By using the modular format of the new B141, architects identify and exclude all services that will not be covered by fees, making it clear that such services are outside the overall scope of work if the client elects them.

Projects: A Broader Context

Architects tend to think of projects principally in the construction realm, but projects have now become a common feature of business and government activity, and all kinds of business change are now considered as projects. For example, researching biomedical and pharmaceutical innovation is frequently undertaken on a project basis, as is software development, moving office, or the implementation of new equipment systems.

Projects are unique goal-oriented events, set up in order to get a client from A to B, from a less preferred set of conditions to a more preferred set of conditions. They are mediums for realizing change and vehicles for realizing ambitions. Projects have specific goals and criteria for success.

Projects are unrehearsed events happening in real time. They have start and end points, without which they lose definition and cannot be meaningfully managed except as ongoing programs.

Projects have specific budget allocations, without which, again, they cannot be meaningfully and economically managed or feature as components of larger programs.

Adapted from Kenneth Allinson, Getting There by Design: An Architect’s Guide to Design and Project Management (1997)

SERVICE CATEGORIES

Architects, through training and experience, possess a fundamental understanding of space, massing, and materiality. On the basis of this understanding, architects can make decisions for a client along a broad continuum, beginning with the identification of the need for a facility and through its planning, design and construction, use, renovation, and eventual disposition. Against this continuum, this section presents services under the following categories:

- Planning
- Design and construction
- Operations and maintenance

Planning services. The overarching goal of services in the planning category is to assist the client in defining what the problem is and to begin to set facility-related con-

straints to craft a statement regarding function, form, economy, and time. The creation of this statement—typically taken into the design process—is considered programming from an architect’s perspective. From the client’s viewpoint, however, elements of this process may be found in such activities as strategic planning, visioning, scenario planning, master planning, project definition, program management, and myriad other activities that occur before design.

Additional skills can enable architects to lead project feasibility analysis efforts that include financial considerations (both funding and revenue generation) to assist the client in development of return on investment calculations, lease versus buy decisions, or even bond issues. Organizational development skills can be added to facility management and programming skills to create facility management organization definition, outsourcing, performance, or evaluation services.

By creatively assessing client needs and offering additional skills in processes led by the architect, architects can become trusted advisors to their clients. We are there for the right reason: We add value through our fundamental strengths and the ability to access and facilitate multidisciplinary professional services to meet comprehensive facility needs.

Design and construction services. With regard to design and construction services, most firms practice the way they did 30 years ago (albeit with a more efficient pencil). Today, technological change in our industry has progressed to the point where architects can begin to take advantage of integrative tools in their work. While efforts to tie computer-aided design drawings to specification information and material lists are maturing, professionals have also begun to recognize the value of capturing and maintaining project information—for programming, team communications, requests for information, and the like—that is accessible to the entire project team. Services described in this section show a progression (or at least a first step) along the path of integration and responsiveness that will increase our ability to lead the process.

Today changes in project delivery cover every building sector, from residences to houses of worship, institutions to corporations, service sector to industry. All this activity points to industry-wide change in client expectations regarding how they hire architects. Service delivery methods in this section present a number of tested alternatives available today. An effort has been made to make individual services and delivery methods as generic as possible so that architects considering implementation of these methods can evaluate whether introducing them into their firms will differentiate them and increase their ability to compete in the marketplace.

Adoption of services and project delivery methods addressed in this section may have a significant impact on how your firm operates and should be carefully considered and planned for before full-scale implementation. For example, the level of detail provided in construction drawings can vary from traditional design-bid-build to design-build approaches. Operational changes such as these are not minor and should be tested on pilot projects, evaluated against expected return, and modified to meet expectations.

Operation and maintenance services. At this time, operation and maintenance services are perhaps the services least understood by architects. However, they are understood all too well by new competitors who are entering our markets in this area because of our inattention. When asked about operation-based services, most architects suggest postoccupancy evaluation and little else.

Competitors in the operations services arena include building controls equipment manufacturers, accounting and consulting firms, food service firms, and outsourced service vendors. While they provide some services that architects do not or should not provide, they are with the client on a day-to-day basis as a result of providing these services and therefore can fill leadership positions in making facility-based decisions.

Why should architects be interested in operations-based services? Monetarily—over and above costs for day-to-day operations of utilities and maintenance—owners can spend as much as three times the original cost of a building over a 50-year building life cycle. Technically, operations-based services fall within our core competency. Marketwise, the square footage of existing buildings significantly exceeds the combined square footage of new buildings being created at any point in time or during any market cycle.

▶ **“Owners . . . want design and construction information to be delivered electronically so they can link operations and facility information. Owners perceive this as a cost-effective way to reduce operational costs. This is the essence behind the life-cycle approach to project information that our industry needs to adopt.”**

AIA Project/Service Delivery Think Tank, July 1999

Building owners and operators seek stasis in the building operating environment as quickly after move-in as possible. The less that goes wrong and the lower the operating costs, the better. A false sense of security arises after an owner occupies a new facility. Building warranties are in effect for a period of time, and contractors generally will resolve component and finish failures for a specified time after construction. This period ends quickly—usually between budget cycles if planning for new equipment replacement, disaster planning, and other facility churn issues have not been fully thought out.

The opportunity exists for architects to step in and assist in planning for these events, and to take leadership in facilitating and managing the disciplines required for them. The operations section presents services that have been used to help clients address building life cycle issues as they occur. Some services are low-level and do not require journeyman architects to perform.

By managing appropriate resources across many facilities, firms can gain an advantage over their competitors by knowing a particular market better. Applying that knowledge, whether through statistical analysis or publishing proprietary building operations guidelines, is how architects can lead clients through their building operation issues. This will result in expansion of the trusted-advisor role and help establish long-term relationships with clients.

CONTENT OF SERVICE DESCRIPTIONS

Each service description in this section organizes the discussion in a consistent manner, beginning with an introductory statement that defines or describes the service, recounts significant aspects of its history, and identifies trends in the marketplace for the service. The introduction is followed by three parts: client needs, skills, and process.

Client needs. This part describes why clients may need the service and what the potential benefits and risks are to a client. It also identifies which types of clients typically need this service and, if known, the market value for the service. Major providers of the service are described and other services usually associated with this service are listed.

Skills. In this portion of the service profile, the author discusses the knowledge, skills, and resources needed to provide the service. Related disciplines that may be involved and the kinds of specialists that may be required are identified, along with any special equipment and tools.

Process. This part identifies factors affecting the scope of the service, generic steps to perform the service (sometimes with a sample work plan), typical steps or phases in the service, and the deliverables generally included. The kinds and levels of staffing required are described, and regulatory approvals are noted where they would be expected.