

A Client Education Checklist

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SUMMARY

Client education can help architects minimize misunderstandings and avoid unnecessary conflict in client relationships. Informing clients about an architect's role and responsibilities is necessary for the development of successful client relationships.

ASSUMPTIONS CAN LEAD TO TROUBLE

Some architects commonly assume that clients have greater knowledge of, and experience in, building design and construction than they actually do. Such an assumption can lead to unnecessary misunderstanding, conflict, and legal disputes. By making client education an integral part of the process, the architect can minimize the likelihood of unintended consequences and foster a long-term relationship of mutual trust.

WHAT EVERY CLIENT SHOULD KNOW

You can help your clients acquire the knowledge needed to make informed decisions. The following checklist, while not intended to be exhaustive, includes some important things for a typical client to know:

- An architect's performance is measured against the professional standard of care, not an arbitrary ideal of perfection.
- Architects should assume responsibility for issues under their control, within reason. For example, architects do not control activity on the construction site and cannot be held responsible for job site safety.
- An architect's ability to maintain a project schedule is limited by factors outside the architect's control and this fact should be acknowledged in the owner-architect agreement.
- Construction documents are not intended to thoroughly depict every element of the design; it would be cost-prohibitive to do so. Therefore, a reasonable number of questions from the contractor should be expected.
- It is not possible to anticipate every possible circumstance or physical condition that may arise during construction. Change orders are likely to occur on any project. Clients should anticipate changes by including adequate contingencies in the construction budget to cover the cost of the changes.
- Changes to the project program or design may require the architect to expend additional time, for which the architect is fairly entitled to additional compensation.
- Architects produce only approximate cost estimates—not fixed, unchanging, or guaranteed cost estimates. Architects have no control over, or special knowledge of, the costs of materials, labor, fuel, and equipment.
- During construction, the architect's role is to determine whether the soon-to-be completed work will generally conform to the requirements of the contract documents. It is the contractor's responsibility to determine the means, methods, techniques, sequences, and procedures to achieve the intended result. Architects who attempt to interfere or direct the contractor in the fulfillment of the contractor's responsibilities may become liable for delay claims or additional cost.
- The architect cannot guarantee or ensure the contractor's performance.

RESOURCES

More Best Practices

The following AIA Best Practices provide additional information related to this topic:

- 05.01.01 Evaluating Prospective Clients
- 05.02.07 Marketing Intelligence

For More Information on This Topic

See “Meeting Client Needs,” “Building Client Relationships,” and “Focusing on Service” by Kevin W.C. Green, *The Architect’s Handbook of Professional Practice*, 13th edition, Chapter 5, pages 49, 57, and 62, respectively.



See also the 14th edition of the *Handbook*, which can be ordered from the AIA Bookstore by calling 800-242-3837 (option 4) or by email at bookstore@aia.org.



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- Practice
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