Forney Residence Accessory Dwelling Unit

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This project involves the project management of a proposed 1,000 square foot accessory dwelling unit that is to be constructed in Alamo, California. The objective is to provide the necessary and efficient means of construction in order to properly establish this unit from conception to permitting. This has been done by obtaining all necessary paperwork, forms, and stamp approvals needed to allow for groundbreaking. The design of the project includes the basic pre-construction activities required to obtain an issued building permit such as collecting bids from architects, working with the client, obtaining plans, developing an adequate schedule and cost estimate, and assembling all necessary documents in order to construct the unit. Upon collection of the pre-construction documents, it became clear how to properly assist a client through the entire process from hiring a compatible architect and engineer to accumulating a building permit. After executing this process, knowledge was gained about the varying codes and regulations from county to county, the required drawings and documents needed for the permitting process, and the different fees that are associated with building a home. This project ultimately serves to showcase a project manager’s responsibilities and tasks from identifying the client to the final deliverable of an issued permit in the hand of the client.

Key words: facilitation, project management, groundbreaking, permitting process

Introduction

The preconstruction phase is claimed to be a major determinant of project success. It is during the preconstruction planning that the production is planned so that the right production flow can be reached. The main purpose of pre-construction services is to assist the client from the beginning of a project at project conception in achieving their design and budget goals. The end result of the pre-construction process is typically saving the client time and money. Understanding what the client wants to achieve is the most important responsibility as the project manager. The project manager is ultimately responsible for the making of the time plans in the project and also having an overall responsibility for the production as a whole. Their role is to be the anchor in the project and to coordinate, communicate and control that the project will reach its objectives. The project manager is focused on obtaining all necessary construction documents needed to correctly construct a building. Construction Documents serve two purposes: to apply for and receive a building permit from the city and to construct the proposed building. Construction documents include all building plans, specifications, and supporting documents used during the completion of a construction project. These documents serve several purposes. First, they help translate the needs to the owner into a buildable format that can be understood within the construction project. Second, they allow the owner to put the project out for bid and to obtain permits from local authorities. Lastly, they provide comprehensive instructions to the project manager as to how the project should be constructed. Regarding this project specifically, the following construction documents were gathered in order to obtain the building permit: all required drawings sets including Architectural, Mechanical, Electrical, Plumbing, and Structural; Title 24 Compliance forms; Cal Green Compliance form; Survey Letter; Sanitation approval stamps; School District fee receipt; Encroachment Permit; Drainage Plan; Debris Recovery Plan; Fire District approval; and Planning Department approval. Ultimately, this project will conclude with the final approval, fees paid, and permits issued which will provide this project with the necessary means in order to construct the proposed accessory dwelling unit. The purpose of this project is to describe the preconstruction planning from the project manager’s perspective and to identify all the required responsibilities in order to execute the process.
How Project Came About

As a construction management major here at California Polytechnic State University, I have always been fascinated with the entire process of building a residential home. I have expressed great interest in many assigned construction labs within the construction management program but the two courses which captivated my attention the most were Residential (CM 214) and Pre-Con (CM 480). These two courses immensely increased my curiosity towards the pre-construction process on the residential side. Someday I inspire to become the project manager for a residential construction general contractor somewhere in the San Francisco Bay Area. I am an advocate of Cal Poly’s motto of “learn by doing” and in order to get to where one wants in life, one must immerse themselves into the situation and receive firsthand experience of the field they are interested in even if it means making a mistake or two. With that said, I was fortunate enough to live by this slogan through my senior project. I was given the opportunity to act as a project manager of a project, working with the client, obtaining bids and all necessary documents needed in order to construct a home. The client, Joanie Forney, happens to be my father’s family friend’s mother who was in need of a home for herself. It just so happens that Joanie’s daughter has a plot of land in the San Francisco Bay Area big enough to construct an accessory dwelling unit on it. Joanie mentioned to her daughter, who then relayed the message to my father that she was in need of someone to walk her through the process and manage the project and all the costs associated with the pre-construction process. To put it simply, she needed a project manager. My father knew that I was in need of a senior project idea and filled me in on the situation. Joanie reached out to me and asked if I could help her out and manage the process for her. She originally offered to pay me but I refused, letting her know that I couldn’t accept any form of payment but agreed to gain some personal experience and complete the job wage-free. She accepted my response and gave me the position as her project manager for her home.

The Process

The process of how this project was properly executed can be represented and illustrated through the following steps:

1. Identified client: Joanie Forney
2. Identified property: 222 Wayne Ave. Alamo, CA.
3. Verified feasibility and legal zoning allowances in Contra Costa County
4. Met with and received first architect’s proposal
5. Met with and received second architect’s proposal
6. Selected architect and engineer
7. Fabricated rough timeline of pre-construction events
8. Projected estimated costs of pre-construction expenses
9. Received permit fee estimate from architect
10. Gathered and paid preliminary fees
11. Submitted plans to Contra Costa County Planning Department
12. Plan check: comments and corrections made
13. Received correction notice of approval from Planning Department
14. Received approval from Department of Sanitation
15. Confirmed California Code of Regulations: Title 24
16. Received engineer’s truss calculations
17. Paid deposit for roof truss engineering
18. Received notice of approval from Planning Department
19. Submitted plans to Contra Costa County Building Department
20. Plan check: comments and corrections made
21. Paid San Ramon Valley Unified School District fees
22. Received correction notice of approval from Building Department
23. Completed Construction Debris Recovery Plan
24. Received building permit
25. Placed building permit and all other necessary documents in client’s hand
26. Project close out

Findings and Accomplishments

Acting as the project manager on the Forney residence accessory dwelling unit, I was able to bring the project from conception to issuance of a building permit. I accomplished the task of assisting the client through the pre-construction process, appropriately gathering all necessary paperwork, documentation, and stamp approvals to allow for groundbreaking. I essentially performed the construction management of this project: obtaining bids from architects and engineers, paying fees and deposits, creating a cost estimate and schedule, and gathering all needed construction documents in order to build the unit. The final deliverables of the project include a total expense sheet and an issued building permit in the hands of the client. Having completed this job, I have gained the information needed to be able to bring a construction project from start to groundbreaking, ultimately providing me with the knowledge of how the entire pre-construction process works. Moreover, acting as the site’s project manager, I have identified a number of personal attributes that I have gained from this experience such as interpersonal skills, decision-making skills, problem handling skills, and also being able to manage and resolve communication conflicts. I believe that I have gained both managerial skills and technical skills in being able to manage this project successfully.

Lessons Learned

After an eight month project, where I performed the duties of pre-construction and facilitation, I was able to obtain the knowledge of what it means to take a project from start to groundbreaking. I gained insight regarding the varying codes and regulations from county to county, the required drawings and documents needed for the permitting process, and the different preliminary fees that are associated with building a home. Acting as the project manager for the project, I utilized the county’s residential building inspection checklist for obtaining a building permit. I learned that there were certain items on the list that were not required per this unit including a permit to construct in a flood zone (since the unit was not in a flood zone), a storm water control plan (since the unit is an in-law unit in a backyard), and a grading permit (since no grading was to be done). One of the greatest challenges that I faced facilitating this project was being able to make time frames for document submission. For the majority of the project I was in school down in San Luis Obispo and the project was up in Northern California which added the
difficulty of having to obtain and submit certain documents and paperwork. I worked real close with architect asking her to submit some documents by herself when I was unable to drive back to the project area for certain weekends. The distance from the project site made it challenging to be fully engaged being that I was not able to have as much face-to-face communication with the client and architect. I was forced to call the client and architect during the course of the week days and during the eight week period when I was abroad in Europe. Fortunately, being away for that amount of time worked out for the best since the planning permit ended up taking nearly two months to process, which is when I coincidentally was gone. If I were to do this project again, I believe that I would have tried my best to find a project around San Luis Obispo so that I could have better access to the project as a whole. The issue with having a project like this is that I estimated an eight month schedule for completion which is difficult when I planned on studying abroad and living in two different places during the time period. The other major issue I faced within this project was the fact that I am not a licensed project manager or contractor and have very little experience with this field of work. It was hard to be taken seriously from time to time by the client and the architect. There were multiple occasions where I was unable to answer questions from the client which I then had to refer to the architect. The people down at the local county office were often confused when they saw me accompanying the architect when we submitted the permitting documents. Luckily, the architect had the credentials to sign off as not only the licensed architect, but also as the contractor. I was just there more so to just shadow the architect during the pre-construction process and gain the knowledge I desired. I may not have had the qualifications to properly facilitate this project but I believe that I did my best to ensure the client that it was in my best interest to meet her expectations and time frames which ultimately I was able to do. This was undoubtedly a learn-by-doing project and I can say with confidence that I definitely learned a lot just by pushing myself to be as involved with the project as I could.