
Design Review

for architectural changes during and after initial construction

(based on Policy development at Pioneer Valley Cohousing)

CohoUS Webchat – 2019

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Contents of Presentation:

PVCH DESIGN REVIEW HISTORY and CHALLENGES

INTRODUCTION

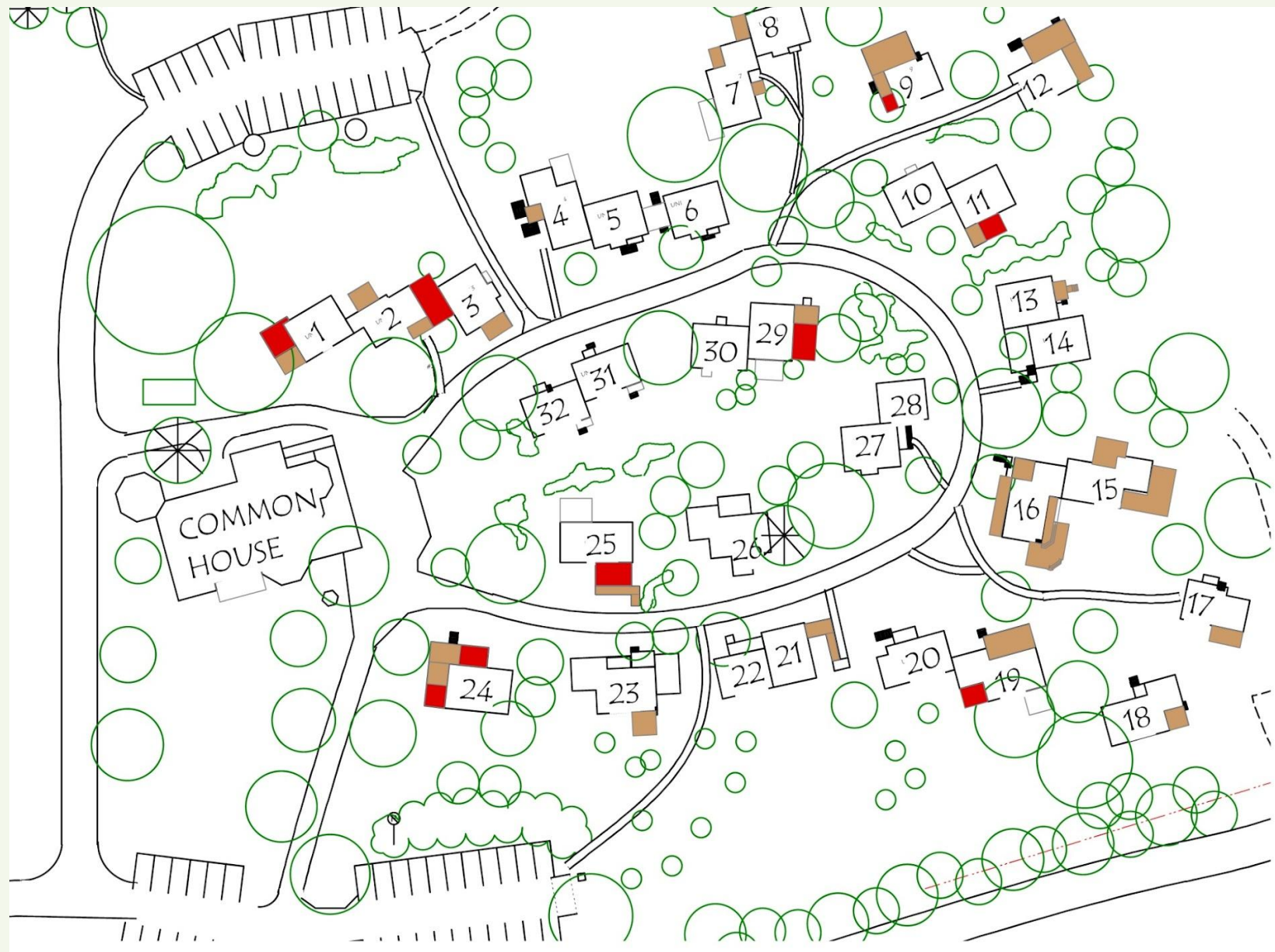
RESPONSIBILITIES

DESIGN CATEGORIES

APPENDICES

APPEAL/GRIEVANCE PROCESS

History of Change (PVCH): 1993-2011



Why is DR so challenging?

- Different values
- Individual vs community
- Expertise is specialized
- Time pressures
- Confusing or no actual manual
- Drawing requirements
- Money (\$\$\$) is involved
- Tension between professionals and homeowners



**Original construction (at PVCH)
set us up for some
challenges.**

**Early additions and changes
were not monitored well
and we had problems.**

**Process was not sensitive
enough □ manual developed
and updated,**



Manual for Design Review Projects and Homeowner Responsibilities

for

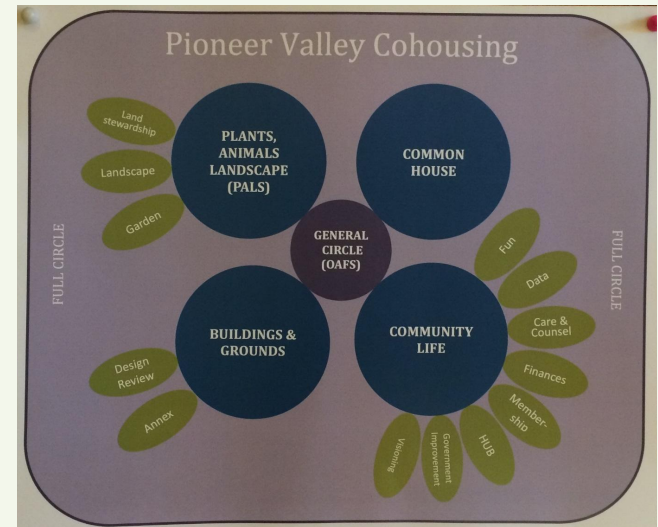
Pioneer Valley Cohousing Community
Amherst, MA

Fall 2015

To be reviewed in Fall 2018 (3 years)

Purpose of the Design Review Process

1. protect assets of community ...
2. ensure community is informed ...
3. ensure circles' input:
 - Buildings and Grounds: durability and drainage
 - PALs: plant and drainage
 - Finance: impact on condominium and development fees
 - Care and Council: positive interpersonal relationships.
4. adequate drawings are provided
5. encourage accessibility



Design Review does not cover changes that are completely internal to a house envelope. However homeowners have responsibility to ensure that the building envelope is not compromised.

Criteria for Evaluation

1. Compelling Rationale
2. Impact on exterior spaces
3. Impact on landscape master plan
4. Impact on community members
5. Safety and light pollution
6. Possible accessibility improvements
7. Aesthetic considerations:
 - Proportion and scale
 - Full or 1/2 glass front doors
 - Finishes
 - Materials
7. Solar and Mini-splits
8. Regional considerations and weather-appropriate elements:
 - Flashings!
8. Safety and code

Responsibilities:

Design Review Committee

Provide transparent process

- For dialogue
- Aid community members in making design decisions
- Educate
- Assist in conceptualizing and understanding design ideas

Homeowner

- Follow the Procedures
- Provide Compelling Rationale
- Contact Dig Safe
- Hire Clerk of the Works
- Attend construction meetings
- Update drawings in community files
- 3 year warranty

Community

- Reading and reviewing sketches
- Responding ...in a timely manner ...
- Seeking help and/or mediation when needed...

The Design Review Committee is not responsible for:

- 1. Condo and Development Fee Updates,*
- 2. Safety & Building Code Violations,*
- 3. Construction techniques.*

APPENDIX A – Procedures Chart

DESIGN REVIEW PROCEDURES and RESPONSIBILITIES, BY CATEGORY – revised 10/13/15

Instructions: Please make sure you date and initial each step as completed. Photo/scan completed chart and post to DR chair and or your unit # within the DR google docs.

	Date completed	STEP	A Addition to House	B Major Change to Houses and Landscape	C Changes to Community Buildings	D Minor Change to House, Landscape, Exterior lighting
1		DETERMINE CHANGE CATEGORY A, B, C, D, or E as defined in the manual and then follow tasks under each column heading.	See definition in Manual	See definition in Manual	See definition in Manual	See definition in Manual
2		GET A REPRESENTATIVE FROM CARE AND COUNSELING to facilitate planning/discussion meetings.	Required	Only required if unresolved objections are raised in the next steps. Can be requested by anyone.	Only required if unresolved objections are raised in the next steps. Can be requested by anyone.	Only required if unresolved objections are raised in the next steps. Can be requested by anyone.
3		TALK WITH NEIGHBORS – before exploratory meeting to gather ideas/concerns to bring to the meeting	Required	Required	Required	Required

	Date completed	STEP	A Addition to House	B Major Change to Houses and Landscape	C Changes to Community Buildings	D Minor Change to House, Landscape, Exterior lighting
16		IF CHANGES ARE MADE AFTER APPROVAL	NOTIFY DESIGN REVIEW and BUILDINGS AND GROUNDS CIRCLES: These committees will determine an appropriate process for any change that falls under Design Review Categories that haven't already been approved by the community.	(see 14A)	(see 14A)	(see 14A)
17		COORDINATE HIRING A CLERK OF THE WORKS	Required (see policy within Manual)	May be required by Buildings and Grounds	Optional as determined by Buildings and Grounds to protect community assets.	N/A
17		GET B&G SIGN OFF after construction is complete	Warranties start (see policy within Manual)	See 15A	N/A	N/A
18		RECORD CHART: SCAN AND UPLOAD THIS CHART TO THE GOOGLE DRIVE : see address below	Required	Required	Required	Required

GOOGLE DRIVE → OAFS → DESIGN REVIEW → PROJECTS REVIEWED → COMPLETED PROJECTS → UNIT #

DESIGN CATEGORIES: A

Additions To Houses (increase house footprint)

- Living Space Additions
- Decks & porches
- Sheds (attached to home or with a foundation)



DESIGN CATEGORIES: B

Major Changes To Houses & Landscape

(doesn't change footprint)

- Dormers and other major changes to the exterior
- New exterior door
- New window(s), skylight(s), roof & wall penetrations.
- Major changes in landscape features (extensive paths, retaining walls, etc.)

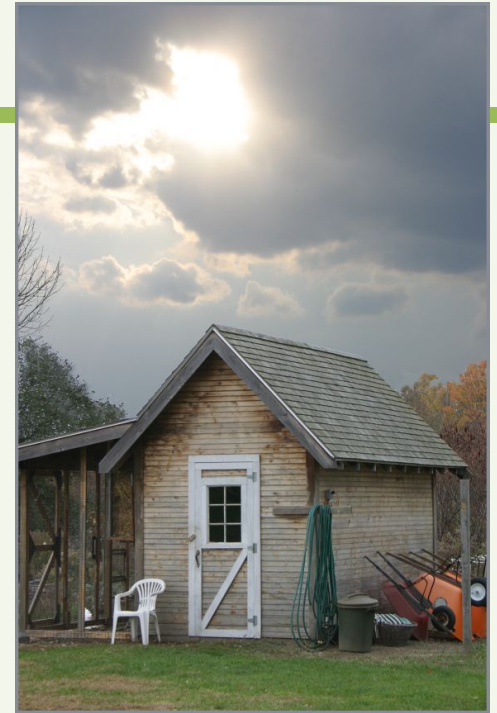


DESIGN CATEGORIES: C

Additions & Major Changes to

Community Buildings & Office Building

- Common House
- Office Building
- Annex
- Carports
- Sheds
- Agricultural buildings



DESIGN CATEGORIES: D

Minor Changes to Existing Houses, Landscapes, Community Buildings, and Exterior Lighting

- Exterior Lighting (dark sky lighting vs safety and security)
- Paint Color
- Minor walkways & terraces
- Signs
- Minor modifications to decks & porches
- Trellises
- Tall and/or extensive plantings
- Temporary/moveable play structures



Compelling Rational

Definition of Compelling Rationale

It is a sufficiently compelling reason for the individual to ask for a change. It considers many levels: the community scale, the building scale, and the detail scale.

Use of Compelling Rationale:

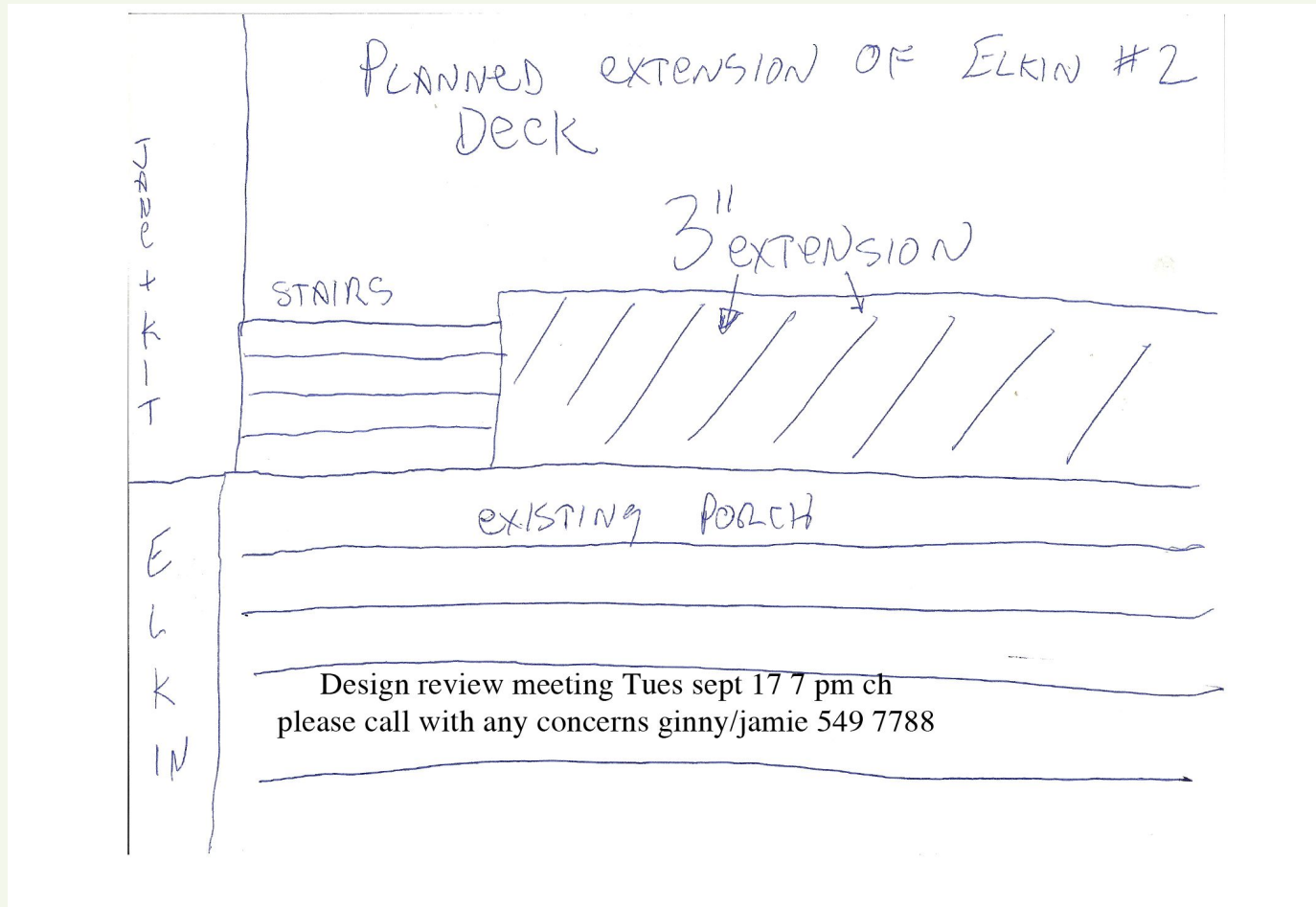
In Design Review **Project Proposal Review Meetings**, we change the dynamic governance norms to:

1. Utilize the concept of **Compelling Rationale**
2. Eliminate the use of **Paramount Objections**, as the goal of early meetings is to get feedback and brainstorm solutions.

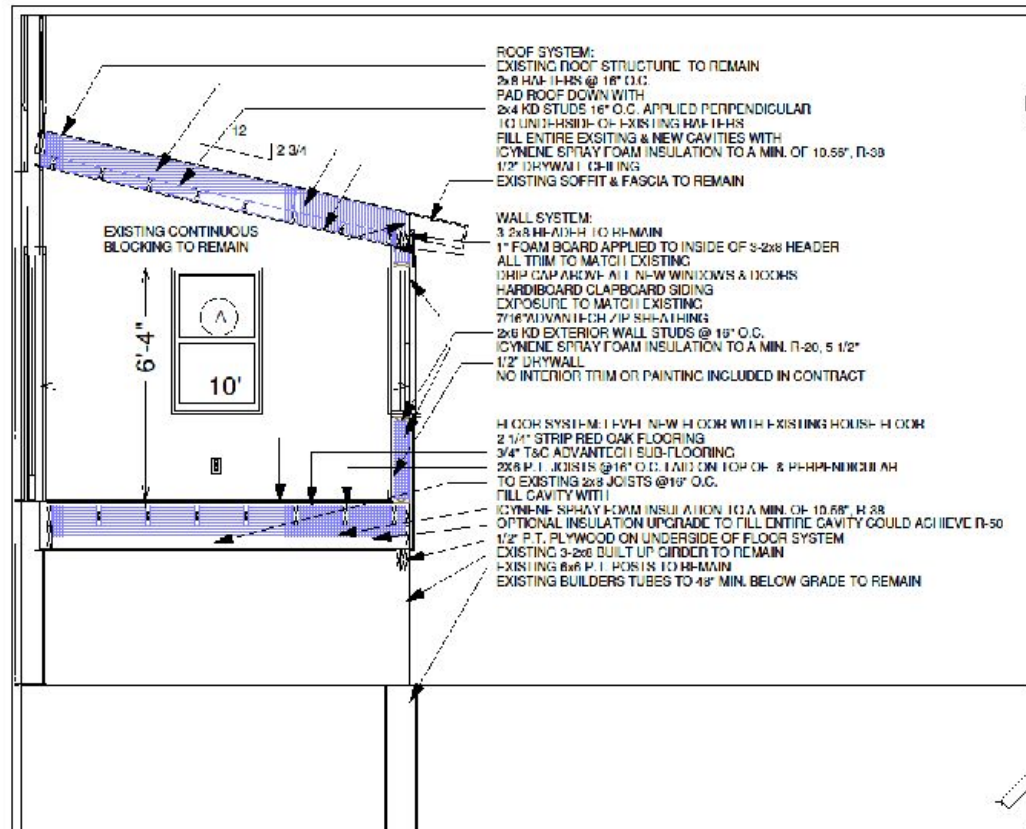
Reason for adopting Compelling Rationale?

1. Design Review proposals typically come from an individual specifically to benefit this individual, as opposed to the typical cohousing proposals that come from a circle, presumably to benefit the entire community.
2. Asking for "Compelling Rationale" places suitable responsibility on the homeowner and increases understanding.
3. Neighbors should feel free to share their concerns and feel that their needs are balanced with those of the proposal. Asking neighbors if they have "Paramount Objections" can set us up for conflict.
4. ***Neighbors should have a reason to say "yes" rather than the burden of saying "no".***

Simple Drawing for a Simple Project

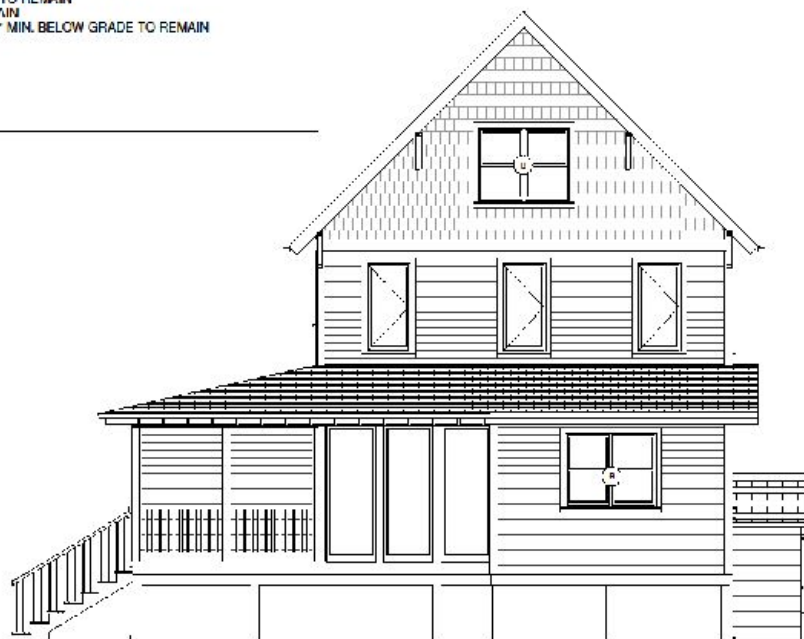


[illegible]



1
A-03 PROPOSED SECTION
1/2" = 1'-0"

2
A-03 PROPOSED WEST ELEVATION
1/4" = 1'-0"



INTEGRITY
Development & Construction, Inc.
110 Pulpit Hill Road
Amherst, MA 01002
415-848-7819 FAX: 415-848-7818
EMAIL: INFO@INTEGRITYBUILD.COM

CONTRACT SET

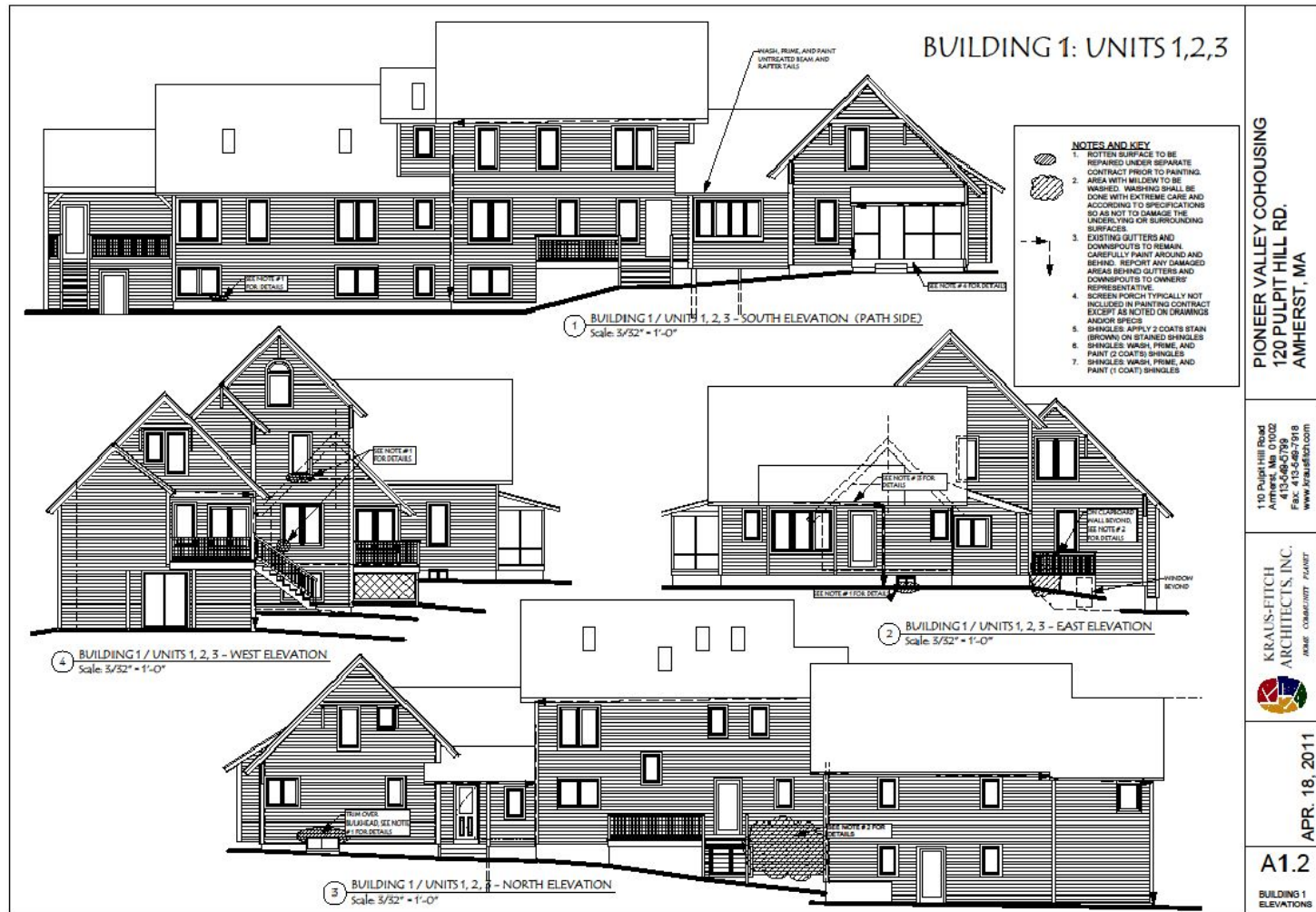
BODHI RESIDENCE
120 PULPIT HILL ROAD #20, AMHERST, MA 01002
STUDY

DESIGN BY
HSBF
DATE:
1/10/2011
SHEET:

A-3

Updating Community Files

We try to maintain a current and accurate set of drawings to aid us in community projects such as repainting and re-roofing.



APPENDIX B – Standard Specifications

- 1.Windows and Doors
- 2.Exterior Trim
- 3.Patching / Infill of Existing Walls
- 4.New Deck / Building Attachment
- 5.New Roof Sections

APPENDIX C – Possible Roles

Design Review Roles



APPENDIX D –

Clerk of the Works Form

Clerk of the Works Site Report

For Pioneer Valley Cohousing – Design Review

Date of Site Visit:

Project Name:

Unit Number:

Name of Recorder (Clerk of the Works):

Description of project progress and specific / relevant items observed:

Note: The main objective of the reports is to confirm that exterior sealants and flashings (at all intersections and penetrations of the exterior envelope), siding, roofing trim materials, etc. meet the objections for low on-going maintenance for the condominium association. Also, the homeowner warranty period, after which the condominium association accepts responsibility for maintaining the exterior, does not start until final report by clerk and sign off by Buildings and Grounds Circle.

Description of remaining relevant items to be installed:

Submit report to

- Current chair of Design Review Circle and /or Design Review project representative
- Current chair of Buildings and Ground circle
- On line archive (file under: OAFS / Design Review . Unit Number

APPENDIX E –

Additional Homeowner Responsibilities *Buildings & Grounds' policies*

1. Wall and Roof Penetrations
2. Solar Panels
3. Roof Leaks
4. Porch painting
5. Porch and Deck repairs

Appeal/Grievance Process

- 1.The homeowner can appeal conclusions/decisions
- 2.Community members can appeal conclusions/decisions
- 3.Community members can bring a grievance
 - a. Construction started without following procedures
 - b. Change during construction without following procedures
- 4.The community can put construction on hold.



Available Documents

1. This Slide Show
2. PVCH Design Review Manual – 2018 version
 - Appendix B: Standard Specifications
 - Appendix C: Possible Roles
 - Appendix D: Clerk of the Works Site Report
 - Appendix E: Additional homeowner responsibilities
 - Appendix F: paint Colors
 - Appendix G: Compelling Rationale
3. Appendix A: Design Review Procedures Chart

Questions

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