

Design Review - Procedures Chart
from Pioneer Valley Cohousing - provided by Laura Fitch for CohoUS Webchat 2019

DESIGN REVIEW PROCEDURES and RESPONSIBILITIES, BY CATEGORY – revised 10/13/15, revised 11/26/2015

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 <i>Do your best to preplan. This process may take 2-6 months!</i>	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 and discussion meetings. Schedule a planning meeting to prepare for the following meeting(s)	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

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4		NOTIFY COMMUNITY OF INTENTION and CONTEXT	<p>Notify all community members in mailboxes and connect of your intention to “do something” and why. Include</p> <ul style="list-style-type: none"> • who is serving as C&C rep. and to whom comments should go; • date/time/place for an “exploratory” meeting, which is at least 2 weeks after notice goes out; • Context about why request is being made • optionally include a sketch of your idea but don’t invest in drawings until after you get feedback informally and at the exploratory meeting. • Request early feedback 	<p>Notify all community members in mailboxes and connect of your intention to make a change. Include</p> <ul style="list-style-type: none"> • A visual representation – drawing, photo, sketch • date/time/place for a review meeting which is at least 2 weeks after your notice goes out. 	<p>Proposal will come through appropriate “circle”. The process may include salons, brainstorm, charrettes, etc. depending on the scope of the project. Disseminate drawings / photos as developed.</p>	<p>Notify all community members in mailboxes and connect of your intention to make a change. Include sketch or description as needed.</p>
5		SET & PUBLICIZE DATE(S) FOR EXPLORATORY MEETING(S) : (see description of this meeting in next task)	<p>Required: Date should accommodate at least two Design Review Committee members, the C&C rep., and there must be at least a two-week lag between written notification to the community (in mailboxes) and the meeting</p>	<p>This meeting can be cancelled if no objections are expressed.</p> <p>Skip to item 8 if not objections raised.</p>	<p>Meeting depends on scope of project, budget, and any concerns registered.</p>	<p>Meeting–required if any concerns registered.</p>

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6		CONDUCT EXPLORATORY MEETING (s)	Required: The purpose of this meeting is to <ul style="list-style-type: none"> • give context • hear early input and feedback • help the homeowner explore design options prior to the investment of a lot of time, money and energy into detailed design and to develop an appropriate timeline to complete the rest of the steps. 	Only if required per item 5.	Only if required per item 5.	Only if required per item 5.
7		MEET WITH FINANCE COMMITTEE	Required: Determine legal and financial implications of proposed addition to unit. The Finance Committee is responsible for communicating these implications to the individual(s) and community.	N/A	Meeting with Capital Reserves Circle may be required to determine how to fund a community project.	N/A
8		DEVELOP PROPOSAL AND/OR SKETCH	Required: Based on feedback from the community and ideas generated in the exploratory discussions, prepare a proposal with detailed drawings and related information. Drawings should be clear and accurate (for clarity of understanding) and include: <ul style="list-style-type: none"> • Floor plans with dimensions • Preliminary Elevations • 	Sketch is typically sufficient	Sketch may be sufficient depending on complexity	Sketch is sufficient

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9		Schedule and Conduct FULL CIRCLE MEETING (for extending house footprint)	Full Circle Required: By previous Community General Meeting, it was decided that the General Meeting (now Full Circle) would ultimately be responsible for approving additions to units footprint, as this involved extending individual ownership onto community owned land.	N/A	As needed	N/A
10		CHOOSE and PUBLICIZE DATE(s) FOR DESIGN REVIEW MEETING(s)	Homeowner is responsible to schedule and notify community of meeting date (at least 2 weeks prior). Distribute notice of meeting date, proposal, drawing(s), etc. on bulletin board in Common House lobby and in each mailbox. Contact Design Review and Buildings and Grounds thru list serve_____; Ensure at least 3 Design Review committee members & the Care & Council Representative can attend	Only required if objections are raised that are not worked out between parties (see 10 A) Otherwise skip to step 11 (decision board)	Only required if objections are raised that are not worked out between parties (see 10 A) Otherwise skip to step 11 (decision board)	Only required if objections are raised that are not worked out between parties (see 10 A) Otherwise skip to step 11 (decision board)

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11		CONDUCT DESIGN REVIEW MEETING(s) Repeat this step, with more meetings as needed to resolve any controversial pieces	<p>Conduct as many meetings as needed in response to neighbor concerns and the level of complexity of the design until consent is reached, or not.</p> <p>a) If consent is reached by Design Review meeting participants Distribute proposal and drawings to all community members and post a copy on the Decision Board for two weeks. Include:</p> <ul style="list-style-type: none"> • Deadline and contact person for responses. <p>If no objections by deadline, the design becomes final</p> <p>b) If consent is contingent on modification or mediation Make changes (or mediate). Schedule and conduct another Design. Review meeting, as per above instructions.</p> <p>c) If consent is not reached Homeowner may ask that proposal go to Full Circle.</p>	<p>“Decision Board process” is sufficient unless objections are raised that can’t be readily resolved.</p> <p>Distribute proposal and drawings to all community members and post a copy on the Decision Board for two weeks. Include:</p> <ul style="list-style-type: none"> • deadline and contact for responses <p>If no objections within two weeks of the posting, the design becomes final</p>	<p>Decision Board process is sufficient unless objections are raised that can’t be readily resolved.</p> <p>See 11B</p>	<p>Decision Board process is sufficient unless objections are raised that can’t be readily resolved.</p> <p>See 11B</p>
12		DETERMINE IF STANDARD SPECIFICATIONS APPLY: See Appendix B of Design Manual	Required	Required	Required	Required

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13		GET BUILDINGS & GROUNDS, DESIGN REVIEW APPROVALS. Get PALS approval as relevant.	Required <ul style="list-style-type: none"> Elevations with accurate proportions and materials noted; Building and wall sections and construction details sufficient for Buildings and Grounds Review regarding maintenance issues. 	Required	Required	As needed
14		SECURE BUILDING PERMIT and CONTACT DIG SAFE	Required	As needed	As needed	As needed
15		FILE COPY OF DRAWINGS & DECISION	Give electronic & hard copy of drawings and decision to Design Review Committee Chair for community file and posting on google docs. Provide drawings to Kraus Fitch architects for updates in community drawing files (see policy within Manual).	See 13A	See 13A	See 13A
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 (COTW)	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

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17a		CONDUCT PROJECT "KICK-OFF" MEETING	Required Prior to commencement of building, convene meeting with Owner, builder, architect, Designer, COTW, and Buildings and Grounds representative to review expectations to meet community standard specifications, etc. and how they will be documented by clerk.	May be required by Buildings and Grounds	May be required by Buildings and Grounds	
18		GET B&G SIGN OFF after construction is complete	Warranties start (see policy within Manual)	See 15A	N/A	N/A
19		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 #