



House Plan Selection Consulting & Questionnaire

2008

Due to many inquiries requesting assistance in selection of our pre-designed house plans, and consulting about possible changes to a plan, we offer a Consulting Service that goes beyond the simple questions that can be answered on the phone. If you call our office or email us and feel like your questions were not properly answered, it is most likely because the complexity of your questions were not ones that could be simply answered without knowing a lot more information. Homes, families, and sites are complex entities which need holistic evaluation to properly answer questions. Architectural consulting is similar to consulting provided by other professionals such as doctors, lawyers, and accountants.

Architects do not offer detailed phone or email consultation except for clients who have already submitted information and paid the appropriate fee (which is based on the average amount of consulting required by previous clients). Most people underestimate the complexity of the questions. We have NEVER had anyone complain about the services received and most compliment us on our insightfulness. In the rare event that you truly needed less consulting for which you have paid, we can credit the extra to purchases of blueprints, erasable vellums, CAD files, changes, or custom design.

Consulting with an architect helps you select a plan, verifies if the plan you like will fit on your lot with a good solar orientation, discusses implications (structural, exterior design, energy, solar, function/floor plan, etc.) of any proposed changes, and many other concerns you may have. However, one of the goals of this questionnaire is to aid you in self-selection of a house plan. After going through this questionnaire, you may find that you don't need our help at all, or just a little advice from your local architect, design professional, or builder.

Reviewing our house plans either on the web site or in The Sun-Inspired House book is recommended prior to initiating our Consulting Services as are your own best judge of your preferences. Our web site has some search features that will allow you to browse by many options such as square footage, direction the house faces, number of bedrooms, number of floors, etc.: <http://www.sunplans.com/html/search.php3> Or here you can search by how the front of the house looks: <http://www.sunplans.com/html/image.php3> If you still haven't narrowed down your selection, send us this completed questionnaire which allows us to search our plans at a deeper level since we know them inside and out. You may want to make notes about certain aspects of various plans that you like. Along with the questionnaire, please submit the \$395 consulting fee (for which you may also pay online):

http://www.sunplans.com/Merchant2/merchant.mv?&Store_Code=001&Screen=PROD&Product_Code=CS-CCP You may return the questionnaire by email, fax, or US mail.

We will review the information and then email you our response often within one week of receiving it. The consulting fee also includes follow up emails to clarify and/or discuss the options. Phone calls sometimes work best at this stage. If one plan in particular is narrowed down quickly, we will most likely advise you that we pause in our services and send you for no additional charge the Study Plans for that house and the Custom Changes Questionnaire. That form prompts you for more detailed changes.

Please note that we cannot guarantee that we have a house plan that fits your needs, but we will point out the house plan that is the closest. We will most likely make some recommendations to adapt it to your needs (by us or others) through our CAD files or erasable vellums. We will advise you when the consulting fee is exhausted and then allow you the option of continuing in the rare event additional consulting is needed. Sometimes the consulting turns into Custom Changes, sometimes into Custom Design, either with us or a local architectural firm.

Please complete as much as you feel is necessary and feel free to add comments as necessary.

- Name(s): _____ Email address: _____
- Phone: _____
- Previous Sun Plans purchases: (include names of Study Plans or Construction Review Sets)
- When do you plan to start building?
- Where will you be building? (city, state or province, country)
- Do you have your property?(recommended for best use of the consulting.)
If so, please send a to-scale site plan showing either true or magnetic north and note which.
 - If your site is tight and/or irregular, please send your survey. Make sure there is a north arrow and that a scale is shown. We will also need to know legal setbacks and any other site restrictions. Contours indicating slope are very helpful.
- If so, what direction are your nicest views? N, S, E, W, NE, SE, NW, SW
- Are you restricted in either length or width of your house including garage?
 - If so, please list the maximums sizes to the building set backs and whether it is a north/south direction or east/west direction. (Or tell us the legal setback per zoning or covenants)
 - You may also want to make some comments about garage door location.
- Which compass direction will the front of your house face? (the side that you see when you approach the house) N, S, E, W, NE, SE, NW, SW
- How much square footage of living area do you anticipate?
 - Total finished?
 - First Floor?
 - Second Floor?
 - Daylight Basement?
- Does your property slope to the south and therefore will it allow for a daylight or walkout basement on the south?
 - Provide amount of slope if known:
- How many stories do you prefer?
- On which floor do you want the master bedroom?
- How many bedrooms do you want including the master bedroom? (call any room with a door and a closet a bedroom even if you will use it for a study, etc.)
 - First Floor
 - Second Floor
 - Daylight Basement
- How many bath rooms do you want and where?
- Do you want a breakfast area in addition to a large dining area?

- What level of wheelchair accessibility are you concerned with?
 - None
 - Entire house
 - Some basic spaces, just these rooms:
- What exterior materials do you prefer?
 - (circle more than one if desired, but also realize that it is fairly easy to change the exterior and roof materials of our plans)
 - Brick, Wood (or cement board siding, vinyl, etc.), Stucco, Stone
- What general style are you looking for? (circle any you are open too and again note that floor plans can be changed on the exterior)
 - Craftsman Bungalow, Farmhouse, Large front porch/symmetrical, Creole cottage (dormers), Neo-classical (brick, hip roof), Southwestern, Something unique, Open to ideas, Other (please describe)
- Where do you plan to park your vehicles? (note that this is another item easy to change on most plans)
 - Carport, garage, basement or outside?
 - Attached or detached or flexible?
 - How many vehicles?
 - Unheated workshop too?
 - Bonus room above the garage? (note that since all sides are usually exposed to the outside or unheated spaces, this can be an energy drain unless you pay careful attention to insulation)
- Do you plan to have a heated workshop, studio, or large home office and if so, where?
- What level of passive solar are you interested in?
 - As much as possible, high priority, I know I'll need a high mass house
 - Average, I know I'll need a little thermal mass
 - Not much, I'm concerned about overheating in winter and summer
- What level of complexity and therefore costs are you looking for in a house?
 - Very complex such is the hipped roofed Atrium plans, design inside and out is high priority
 - Average, we want a modest home with some character
 - Simple, we'd rather put our money in finishes and fixtures than the shape of a house
- What other design, energy, or construction features are important to you?
- Where did you hear about us?
- Would you be interested in custom changes to one of our plans?
 - (If so, we will send you by email our Custom Changes Questionnaire that outlines the policies and fees and includes a list of references.)
- Would you be interested in Custom Design if none of our plans seem to fit your needs?
 - (Most of the plans on our web site were designed for clients that answered yes to this question. If so, we will send you by email our Custom Design Questionnaire that outlines the policies and fees and includes a list of references.)

Thank you for your time and interest!

(Please note that this is a one time consulting except by further arrangement and does not include continuous communications.)