



EVOLUTION
ARCHITECTURE
Building Envelope Consultants

HOA GUIDEBOOK

A Roadmap for Construction Projects



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ABOUT US

HOW WE CAN HELP YOU:

- Building Envelope Inspections, Design and Project Oversight
- Roof Inspections & Replacement Design
- Full Service Architectural Design
- 3-D & 2-D Modeling
- Water Testing and Leak Diagnosis
- Litigation and Claim Support
- Project Management
- Budget & Scope of Repair Preparation
- Project Oversight
- Due Diligence Inspections
- Budget Preparation
- Bid Package Creation and GC Management
- Owner Representation

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Partnering with Evolution Architecture has been a rewarding experience, particularly during our significant capital restoration projects. Their expertise in overseeing condo recladding and architectural design is truly exceptional within the multifamily sector. Their thoughtful, customized approach has been invaluable. I've consistently trusted their commitment to quality and their deep understanding of the unique needs of condo properties. Evolution Architecture really sets a high standard for excellence.

- Michelle Weaver | Best Management



Questions? Please Ask!

Jackie Roethel

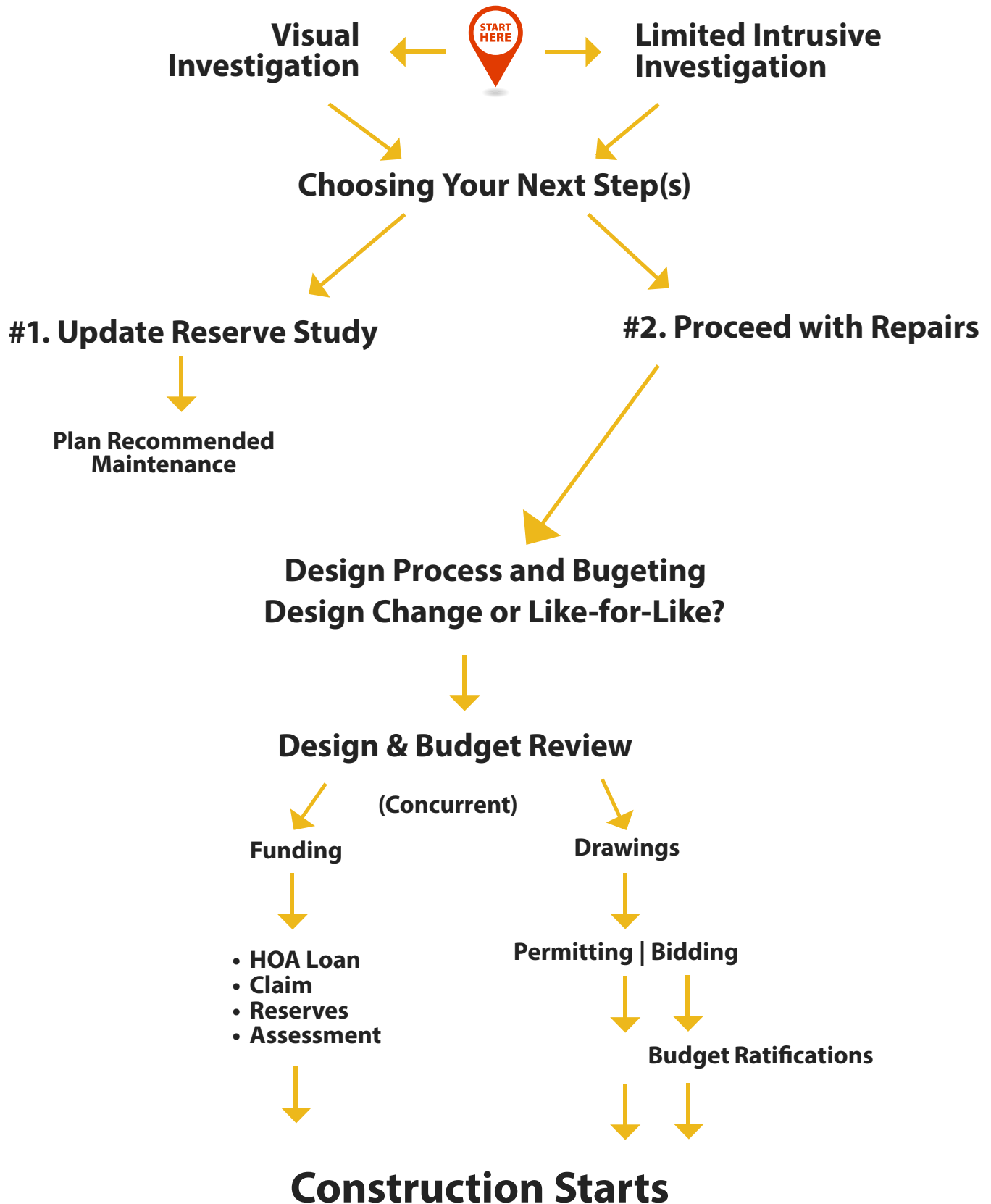
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ROAD MAP FOR CONSTRUCTION PROJECTS



Once construction is completed, update your reserve study and plan for future maintenance

Which Type of Investigation are you Choosing?

Visual Investigations -

A visual investigation at a condominium or apartment building involves a thorough examination of the property's building envelope, focusing on observable conditions without conducting invasive or destructive testing. This inspection aims to identify any visible defects, maintenance issues, or safety concerns. Key areas typically assessed include:

- Exterior Structure: inspecting the building facade, walls, roof, windows, planters, courtyards, garages and decks for damage or detail issues.

It's important to note that a visual inspection is not as comprehensive as a detailed intrusive inspection, which involves removal of siding materials.



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Limited Intrusive Investigations -

A limited intrusive investigation is a more in depth review of the building envelope involving removal of the siding materials at several locations. The purpose of these openings is to assess the underlying conditions, identify potential issues, documents hidden water damage, and determine the extent of repairs needed.

During the investigation, the wall sheathing and any exposed framing will be tested for water content. Following the investigation, Evolution develops a findings report with photo documentation and descriptions of the existing conditions.

The limited intrusive approach is a highly sought after option for Boards to learn more about their building with minimal disruption to residents while still obtaining valuable information.



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Recommendations & Findings from your Investigation:



BUILDING ENVELOPE INVESTIGATION REPORT

March 15, 2023

With either method of investigation, a report is issued to the Board, with recommendations categorized by priority.

This phase of the project cycle is when the Board begins conversations about next steps.

Generally, the Board has three options - with the initial conversation of reviewing prioritization of repairs in conjunction with your budget;

1. Update your Reserve Study, and Schedule Future Work
2. Proceed with Repairs

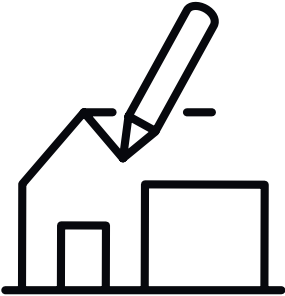
Summary of Recommendations and Suggested Timeline

Building Element	Scope of Maintenance or Repair	Timeline
At-Grade & Site – Parking Lot & Sidewalks	<ul style="list-style-type: none"> Maintain pavers, asphalt parking lot and landscaping 	Maintain as necessary.
At-Grade & Site – Trash Enclosures and Fences	<ul style="list-style-type: none"> Replace damaged siding and hardware Repaint fences and siding 	Repair, 1 - 3 years Maintain as necessary.
At-Grade & Site – Foundation Walls	<ul style="list-style-type: none"> Repairing concrete spalls Adjusting slope away from building Maintaining vents and penetrations 	Repair, 1 to 3 years. Maintain as necessary.
Stairs -	<ul style="list-style-type: none"> Replacement of railings Repair damaged decking at landings Repair damaged framing and structural connections. Review ice melt and maintenance protocol Structural review of framing 	Repair, 1 year or as soon as feasible.
Walkways -	<ul style="list-style-type: none"> Replacement of railings Remove carpet and installation of new deck coating 	Repair, 1 to 3 years
Decks - Unit Decks	<ul style="list-style-type: none"> Repair of framing, trim and decking Replacement of railings Recoating and painting 	Repair, 1 to 3 years
Decks – HVAC Installation	<ul style="list-style-type: none"> Review existing penetrations at deck walls Produce installation standard and maintenance plan 	As needed
Cladding - lap siding and trim	<ul style="list-style-type: none"> Campaign to repair and maintain existing cladding Reclad with new siding (if feasible) Maintain flashings and reapply sealants 	Repair, 1 to 3 years. Maintain yearly.
Windows -	<ul style="list-style-type: none"> Replace damaged units Full scale replacement if reclad is feasible Produce installation details and standard 	Replace at reclad. Full replacement within 5 years.
Doors –	<ul style="list-style-type: none"> Replace SGDs at time of reclad General maintenance to service hardware, weather seals and sweeps. 	Replace at reclad. Maintain as necessary.
Roofs -	<ul style="list-style-type: none"> Replacement of asphalt single roofs Maintenance of gutters, penetrations and flashings 	Replace in 1 to 3 years. Maintain yearly.

Two Options Post Investigation -

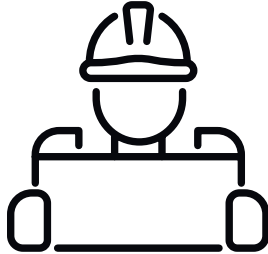
OPTION 1

Update Your Reserve Study



OPTION 2

Proceed with Repairs



Option Breakdowns

1. Updating our Reserve Study:

After a condo inspection reveals that there isn't an immediate need for work to be performed, it's important to update your reserve study per the report findings. However, it's equally crucial to develop an appropriate maintenance plan for your condo or townhouse during this interim period. Here's a suggested plan of action:

- **Update Reserve Study:** Incorporate the findings of the inspection into your reserve study. This involves adjusting timelines and budget allocations for future projects based on the assessment.
- **Regular Maintenance Checks:** Implement a schedule for regular maintenance checks on the building exterior. This includes inspections for signs of water damage, or other issues that could potentially lead to damage.
- **Educate Residents:** Keep residents informed about the findings of the inspection and the steps being taken to maintain the building(s). Encourage residents to report any signs of damage or maintenance issues they observe.
- **Budget Appropriately:** Modifying budgeting practices in preparation for projects coming up in the near future.

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2. Proceeding with Repairs

SCOPE PREPARATION: Every new project begins with drafting of the building(s) to provide the Board conceptual designs to design the new look of the exterior and allow for proper quantification of materials for budgeting. This is a unique and exciting time for Boards to begin to witness and be part of the property transformation and next life.

Below are some points to consider during the Design / Scope phase of the project;

- **Budget:**

This is arguably the biggest conversation in changing the aesthetic of your property, and deciding the overall scope of repair. Changing the design will incur additional costs, engineering | architectural fees, and material costs.

- **Architectural Style & Compatibility:**

An opportunity to reshape the appearance of the property is a great opportunity. Taking into consideration the style and appearance of neighboring buildings is also a factor to consider in the design choices.

- **Maintenance & Durability:**

Assessing the long term maintenance and durability of products on the market. Evaluate materials for long term cost, both in life of the product and required maintenance.

- **Funding Options:**

Project funding is often a mix of sources including reserves and can include special or serialized assessments. Funding sources should be considered for long term consequences and must incorporate needs as well.

Before



After



Rendering



Budget Breakdown and Options for your Community -

Funding Options:

There are several funding options to consider for your construction project.

- **HOA Loans:** An HOA loan involves borrowing money from a financial institution to cover the expenses of the project. This option allows the HOA to spread out the cost over time,
- **Special Assessments:** A special assessment involves charging HOA members a one-time fee to cover the costs of the project. This fee is typically based on each member's share of ownership or square footage and is in addition to regular HOA dues. While a special assessment can provide immediate funding for the project without incurring interest or repayment obligations, it may be met with resistance from HOA members who may perceive it as an unexpected financial burden.
- **Tapping into Reserves:** HOAs set aside funds in reserve accounts for anticipated expenses, such as maintenance or repairs. Utilizing reserves for your project means tapping into these funds rather than taking out a loan or imposing a special assessment. While using reserves can provide immediate access to funds without incurring debt, it's crucial to ensure that the reserves are sufficient to cover the project costs without depleting essential funds needed for future expenses.
- **First Party Claim (For Washington Properties Only):** Utilizing settlement funds from a First Party Claim (FPC).

Getting your Loans:

Below is a check-list to help get you started on the loan process.

1. Do you have HOA approval to take out a loan?
2. Connect with your Lender to help you assess your properties current financial status.
3. Does your project have a scope of work by a licensed professional?
4. Do you have a licensed Architect on board to help with the pre-application process and permitting?

Project Start: From Design to Construction

"THEIR CONTRACT ADMINISTRATION DURING THE COURSE OF THE PROJECT IS ONE OF THE BEST IN THE INDUSTRY. THEY ARE VERY TIMELY IN THEIR RESPONSES TO COMMUNICATION, WHICH IS CRITICAL IN KEEPING PROJECTS ON SCHEDULE. WITHOUT HESITATION, I CAN RECOMMEND EVOLUTION ARCHITECTURE FOR ANY TYPE OF PROJECT THAT INVOLVES THE BUILDING ENVELOPE AND/OR REPLACEMENT OF THE EXTERIOR FAÇADE."

- ARNIE QUACKENBUSH
ABBOTT CONSTRUCTION



Drawings

A set of Architectural Drawings by a licensed professional are generated for the Board to review, and approve (1), to include in the permitting process and pre-application with the city.

A set of drawings is a visual representation of what your property will look like post construction and is also what is used to include in your bid package for a contractors and used for permitting.

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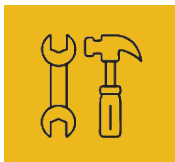
Permitting

Submitting drawings for permit approval requires careful attention to detail, compliance with regulatory requirements, and effective communication with permitting authorities to ensure a smooth approval process.

Depending on your jurisdiction, permitting approval process can take several months.

Permit Submission Requirements:

- Application form
- Set of Architectural drawings stamped by a licensed professional
- Loan information
- Permit fees
- Other supporting documentation that might include product specifications, materials, or any additional information the city may require.



Bidding

Part of Evolution's scope is helping assist the Board managing the process of soliciting bids from multiple contractors that specialize in occupied restoration projects. We help ensure transparency, fairness, and encourage contractor interviewing when necessary.

Evolution's team is comprised of multiple construction professionals with decades of hands on project experience and budget preparation, making our team a solid partner in helping the Board / Ownership navigate the project bidding with our vetted and qualified contractor pool.



Selecting a Contractor

Selecting a Contractor for your project is an important step.

Evolution strongly vets their contractors for all the bid packages assembled, choosing contractors that have a strong expertise and who would be a great partner.

Evolution helps the Board / Ownership compare and analyze bids, and help facilitate interviewing.

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Before



After



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Construction | Project Oversight | Closeout

Construction Starts:

Once a contractor is selected by the Board and permitting has been approved, the project can start.

Project Management Services Include:

- Owner, Architect, Contractor (OAC) Meetings: Attend weekly construction meetings with contractor and Board representative(s).
- Field Reviews: Perform visual inspections of work being performed to ensure strict compliance with plans and specifications.
- Submittal Review: Review contractor submittals for products and materials to be utilized on the project to ensure conformance with the contract documents.
- Pay Application Review: Review contractor's monthly pay applications to be submitted monthly to verify the amount submitted is consistent with the work that has been performed.
- Change Order Review: Review proposed change orders and change order requests from the contractor to verify validity and cost.
- Request for Information (RFI): Review and respond to requests for information from contractor as required to facilitate and install the work.
- Third-Party Inspections: Perform periodic inspections as required by RCW 64.55. Draft a letter at the end of the project indicating that the work complies with the construction documents. This work will be performed concurrently to the field reviews.

Project Closeout:

- Punch List & Closeout: Perform punch list field reviews at the end of the project to ensure that all work is completed prior to certifying the final application for payment from the contractor.
- Third-Party Inspections: Perform periodic inspections as required by RCW 64.55. Draft a letter at the end of the project indicating that the work complies with the construction documents. This work will be performed concurrently to the field reviews.
- Work with contractor to compile as-built drawings, project records, maintenance and warranty information.

Project Work Chart

A Board tool to gage project timelines and milestones

BEFORE	DURING	AFTER
<p>PRE-PROJECT TIMELINE:</p> <p>CONTACT ATTORNEY AND LENDER EARLY</p>	<p>KNOW THE CONTRACT:</p> <p>COST, DURATION, TIMELINE, ROLES/ RESPONSIBILITIES</p>	<p>FINAL PAYMENT & CLOSEOUT:</p> <p>JOB CLOSEOUT DOCUMENTATION –PLANS & SPECIFICATIONS, O&M MANUAL, CONTRACT WITH CHANGE ORDERS, PROJECT PHOTOS, MATERIALS USED, PERMIT CLOSEOUT WITH JURISDICTION</p>
<p>SCOPE OF WORK - WANTS VS NEEDS BASED ON:</p> <ul style="list-style-type: none"> • PROPERTY ASSESSMENT/ INVESTIGATION • RESERVE STUDIES, INSURANCE REQUIREMENTS • BUNDLE PROJECTS FOR LOAN 	<p>CHANGES HAPPEN.</p> <p>COMMUNICATE WITH YOUR CONSULTANT</p>	<p>CONTRACTOR WARRANTIES:</p> <p>MATERIAL AND WORKMANSHIP WARRANTIES.</p>
<p>FUNDING SOURCES:</p> <p>RESERVES, LOAN, INSURANCE</p>	<p>PROJECT LOGISTICS & COMMUNICATION:</p> <p>DESIGNATED STORAGE AND PARKING AREAS; ACCESS RESTRICTIONS; NOTICES TO HOMEOWNERS AND TENANTS; ANSWERING QUESTIONS (YOU WILL BE ASKED!)</p>	<p>OWNER-REQUIRED MAINTENANCE:</p> <p>IF NOT PERFORMED, COULD VOID WARRANTIES</p>
<p>DO YOU HAVE A QUALIFIED TEAM IN PLACE?</p> <p>CONSULTANT/CONSTRUCTION MANAGER/DESIGNER, CONTRACTOR</p>	<p>HOA TIME COMMITMENT:</p> <p>WEEKLY OAC (OWNER, ARCHITECT, CONTRACTOR) MEETINGS. BOARD REPRESENTATION HELPS WITH TIMELY DECISION MAKING</p>	<p>UPDATE RESERVE STUDY:</p> <p>PERIODIC INVESTIGATIONS STILL RECOMMENDED</p>