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Introduction



The objectives set during this first stage lay a foundation for the rest of the project.

Design Toolkit

Determine whether building a new house is your best option
Prepare an Outline Brief for a residential design and build project

Designing and building a new house is an overwhelming but exciting experience. Whether you're developing a new home for your family or developing land or housing as an investment, good preparation is crucial. The Key Activities below offer a step-by-step guide to ensuring you have all your bases covered before you begin.

How good preparation contributes to your project objectives

The objectives set during this first stage lay a foundation for the rest of the project, and will be a constant reminder of what you first set out to achieve. They set guiding principles against which progress should always be measured.

Although overlooked by many, this first stage is key to achieving your outcomes. It contributes to informed decision making and can reduce the chance of mistakes later on. While doubts at this point are absolutely normal, this stage helps to remove them as experts become involved and knowledge is gathered.

Key Activities



At this stage you need to confirm that a new house is the right approach.

Confirm a new house is the right approach

The first thing is to consider whether building a new house is the right plan for you, based on your objectives and the time and money you have available. Ask yourself if:

- you could renovate an existing house and achieve the same objective
- move an existing house to a new location, rather than build a new house
- you could subdivide your land for development instead of buying a new site
- you have the time and money to invest in a new house building project
- you have considered the impacts your project will have on energy and water use, health and comfort, waste and place (see 'Approaches to Sustainability' in the Sustainability hub for more information)
- there are any planning limitations in the area you are considering that increase the complexity of new developments
- there is enough demand for the type of house and location you are planning, to ensure you get the price you expect (if you are planning to sell after you build).

Understand the level of commitment

If, after considering the above, a new house is the answer then you can continue secure in the knowledge that you have made the right decision. Designing and building a house will be exciting and rewarding, leave you with a great sense of achievement and make you knowledgeable about building in Auckland.

However, it's important to understand that the process you're committing to will also require a lot of time, effort and money. Deciding how much of each you can commit to the project, and what type of role you would like to take will help you select from the project delivery options discussed in the Plan stage (Section 2 of this guide).

Establish a knowledge base

You will need to do some research on the best way of doing things and discuss this with others in your household. Types of research that can be useful for this are:

- talking to people that have been involved in similar projects
- looking at books and magazines for case studies and ideas, or you could use online apps such as **Houzz** (<http://www.houzz.com/>) and **Pinterest** (<https://help.pinterest.com/en/guide/all-about-pinterest>) to start collating case studies, materials and products that appeal to you. The more information you have, the better you will be able to communicate what you want to your designer.
- finding out the cost of similar projects in similar locations
- learning where and when to get help
- having an informal conversation with an architect or architectural designer about the design and build process.
- finding out about certification schemes that could guide your process (see 'Approaches to Sustainability' in the Sustainability hub for more information)
- quantifying the conditions in which you feel comfortable (e.g. temperature and humidity levels). This will be helpful when setting comfort and health targets for your project (see 'Comfort and Health', 'What should I be aiming for' section of article in the Sustainability hub for more information)

Develop the Outline Brief

Developing an Outline Brief starts with forming a Vision Statement. This communicates the project's overarching aims and objectives. It should be the central, most important aspect of why you are building a new house. As the project progresses and changes, your Vision Statement should be a reference point for testing the design as it evolves. It can be as simple as a single sentence. For example:

- Build a house that respects the style of the existing neighbourhood while taking into account the taste of potential buyers.
- Create an infill development where both houses have equal access to sunlight and privacy.
- Create a green building that has no impact on surrounding ecosystems.

An Outline Brief also gives more detailed information which is used to communicate your objectives to design experts. It should balance what is wanted and what is needed in the house, based on who will be living there.

Your Outline Brief should include:

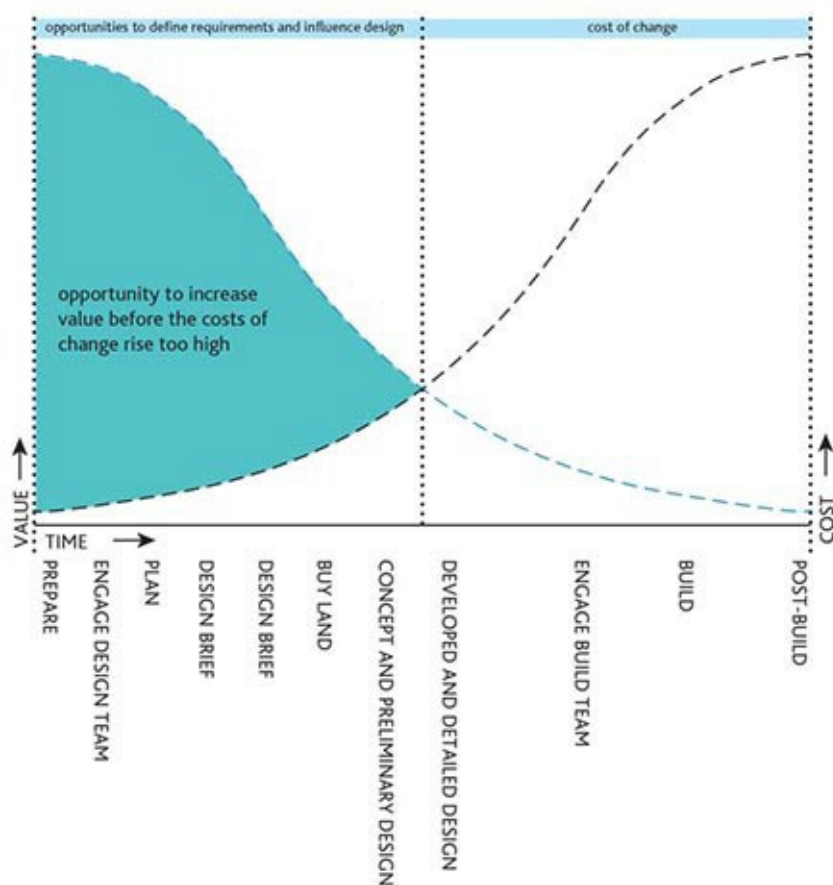
- **Vision Statement:** This communicates the project's overarching aims and objectives and becomes the guiding principle of what is to be achieved in the end. It should be a constant reference point throughout out the project.
- **spatial requirements:** These should be described in terms of quality, not quantity (e.g. open plan living for socialising and entertaining, with private and quiet spaces to retreat to).
- **user requirements:** Both present and future users should be considered (e.g. ramps instead of stairs for old age, wide doors to allow wheelchair access, room for family boat).
- **sustainability objectives:** Consider the possible impacts of your home and decide on sustainability outcomes that reflect your priorities around areas such as energy, water and comfort and health.
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- **performance requirements** (e.g. no need to heat the home in winter).

- **location requirements** (e.g. lifestyle preferences, access to transport or amenities).
- **how the building integrates** with the local context and environment.
- **an overall budget**
- **a general schedule.**

If you are building the house for yourself, the items above should reflect the priorities of your own family. If the house is being built to sell on, the priorities should reflect those of the market you anticipate selling to.

If you have already acquired land for the house or are considering infill development, it will be necessary to include site considerations in the brief.

Decisions made in these early design stages are the least costly and are likely to have the most impact on the whole life of the building, so it's a good idea to achieve the right balance between quality, time and cost in your Outline Brief. While one of these may be a priority, none should be sacrificed entirely in the face of external pressures. Remember - improving design quality can sometimes come at a cost, but will also result in a higher-value property and can save you money in the long term.



Opportunities to increase value. Source: CABE, Creating Excellent Buildings, pg. 22

Consider money matters

It is important to consider economic matters at this early stage of the process. In estimating a budget for the project there are some key issues to take into account:

- **Define a realistic budget and try to stick to it.** It can be easy to overcapitalise by spending money that will not be recovered if the house is sold in the future. The house's estimated market value should always be kept in mind, even if you intend to use it yourself for a long time.
- **Consider all costs.** There may be costs you are unaware of. The budget should cover not only the price of the land, designer's fees and construction costs, but also a range of other costs including fit-out furnishing, landscaping, sub-consultant fees, legal and finance costs, development contributions (<http://www.aucklandcouncil.govt.nz/EN/ratesbuildingproperty/developmentfinancialcontributions/Pages/home.aspx#estimating>) and consent application fees.

- ◆ **Consider long-term costs.** Solutions or approaches that may seem expensive at first can reduce the running costs of the home (e.g. energy, water, maintenance) and save money over the life of the building. Studies on homes built to a 5 or 6 Homestar rating (https://www.nzgbc.org.nz/Category?Action=View&Category_id=211) show that the initial investment to improve the performance of a home is paid back within seven years, with such houses saving between \$573 and \$729 per year.
- ◆ **Keep in mind that every requirement captured in the brief will have a cost associated with it.** This understanding will help to set realistic expectations regarding what is possible within your budget.

Some websites that may help with researching building costs are the Department of Building and Housing Quick Calculator (<http://www.dbh.govt.nz/Utilities/calculator/QuickCalculator.aspx>) and need2know.org.nz (<http://need2know.org.nz/what-you-need-to-do/calculator/>). While focused on providing information for people looking to rent, the Affordability in New Zealand (<http://affordability.org.nz/>) website also presents information that shows how where you choose to live (in relation to where you work) impacts the amount spent on transport.

Deliverables

Outline Brief

The Outline Brief forms the foundation of the final design and will pose questions and challenges that should be solved as the project develops.

See the Outline Brief checklist later in this section for the areas your brief should cover.

Who should you be talking to?



The 15 minutes of free advice offered by council can be invaluable at this stage.

Architect/Architectural designer

Engaging a designer at this stage can help guide your vision and improve the chances of achieving the desired outcome. It's important to select a professional and experienced architect or architectural designer, as this will be the person who transforms your ideas and vision into a reality. In addition, acquiring a designer's expertise at this early stage will help you decide if your plan is achievable in terms of budget and scope. You can read more on Engaging A Design Team in Section 3 of this guide.

Council

You do not need to contact the council at this stage, but it does offer 15 minutes of free advice (<http://www.aucklandcouncil.govt.nz/EN/ratesbuildingproperty/PreapplicationAdvice/Pages/PreApplicationMeetings.aspx>) if you wish to discuss consent requirements, timeframes and costs at a high level. This might assist in making informed decisions from the beginning and avoiding unnecessary changes and delays in the future.

The Housing (<http://www.aucklanddesignmanual.co.nz/sites-and-buildings>) section of the Auckland Design Manual also offers design guidance for people undertaking new housing projects, and highlights relevant issues to consider in future stages.

Bank

Talking to your bank manager will be useful to get an overall idea of how much they can lend, the conditions of loans, and the typical timings for disbursements.

Real estate agent and valuer

The real estate market changes rapidly and in ways that are not always obvious. Talk to a real estate agent to understand present trends, land value in your preferred locations, and characteristics that help with resale. This will help with estimating the maximum capital value that should be invested in the project. Property valuers are also an important source of information. Registered valuers are members of a professional institute, can offer a more objective and wider view of the market, and may be better informed on future market trends. It is important to remember though that real estate agents and valuers are not design professionals, and advice on this subject should be sought from people who are.

What to look out for



Make yourself aware of exactly what's involved in all possible options.

Not balancing quality, time and cost

A common mistake made in this first stage is ignoring the need to balance quality, time and cost. This can result in one of the following undesirable outcomes.

1. **Setting an unrealistic vision:** As you dream about your ideal house it is easy to end up with too many things you want but don't need and can't afford. Therefore, it is important to categorise requirements as essential, important, nice-to-have, etc.
2. **Failing to understand the possibilities:** Falling short of aspirations and failing to dream a little may result in a house that meets all the basic needs but does not enhance the lives of the people who will live in it.

Underestimating commitment

Underestimating the level of commitment the process demands is also a risk. Building a house requires a lot of available time and money, and the ability to make decisions that will have great implications in the future, even if they seem small in the present. If you can't commit to these there are other routes and options for getting a new house that may be more suitable.

Not considering other options

Another risk is failing to consider other options beyond building a new house on a new site. Renovating or subdividing an existing property may be better suited to your objectives. Not considering these alternatives at the beginning can result in wasted time and money. A professional architect or architectural designer will help you consider all options available and reduce this risk

Copying others

A common mistake is to copy what others have done, rather than making the most of the unique opportunities available to your project. It is also important to remember that planning controls, market taste, construction

technology, and people's expectations are constantly evolving. The circumstances of your project may be very different from those experienced by your neighbour, friend or family member. To achieve maximum value it is important to choose the right housing type for your **site** conditions.

Thinking about solutions instead of outcomes

This stage is about defining guiding principles and priorities for the rest of the process. Jumping straight into considering solutions can limit the scope of work of the project team and lead to unexpected outcomes. For example, deciding you want to get a heat pump before setting goals around comfort and health can lead to overlooking the importance of improving the house's capacity to retain heat. See the **Sustainability** hub for guidance on how to set objectives in key areas such as energy, water, and comfort and health.