

We ask our clients to consider these questions to better focus on the details that further help make the house your home. It is not a test so do not feel you have to answer every question (some get a bit personal). Enjoy the exercise, and humor is welcomed.

Name: \_\_\_\_\_ Phone: \_\_\_\_\_ Email: \_\_\_\_\_

Name: \_\_\_\_\_ Phone: \_\_\_\_\_ Email: \_\_\_\_\_

**Planning for the Inhabitants**

1. Who are the anticipated residents?  
\_\_\_\_\_
2. Are there pets and/or livestock?  
\_\_\_\_\_
3. What is the length of occupancy of each resident?  
\_\_\_\_\_
4. What is the total square footage of the required living areas?  
\_\_\_\_\_
5. What inspired the area? Is this flexible?  
\_\_\_\_\_
6. List any health related or other circumstances that may affect design decisions.  
\_\_\_\_\_
7. Should handicap accessibility be a consideration?  
\_\_\_\_\_
8. Should expansion flexibility be a consideration?  
\_\_\_\_\_
9. What is your construction scheduling needs?  
\_\_\_\_\_



10. Approximate budget per square foot of conditioned space (measured to outside of bearing wall) is approximately \$ \_\_\_\_ / SF, or maximum budget of \$ \_\_\_\_\_ for home construction alone.

---

11. What will you primarily use this project for? Primary residence / vacation home / \_\_\_\_\_

---

### Planning for the Site

1. Will we use a septic system or is a municipal sewage hookup available?

---

2. What is the source of drinking water?

---

3. Will a driveway need to be built? If so, how long?

---

4. Is electricity readily available?

---

5. The structure is to be erected on a site with terrain that is:

- Flat                       Sloping                       Irregular

6. Has a site survey/geotechnical report been performed? (This may be required)

---

### Vehicles

1. What transportation and recreation vehicles, construction equipment, and farm/lawn/garden equipment do you need to store, and what kind of shelter is required?

---



---

2. Do you have a vehicle that can't fit under a 7' tall overhead door?



**Utilities and Equipment**

1. What type of hearth is desired? Fireplace / Wood Stove / Masonry Heater / None

---

2. In what locations would the hearth be important?

---

3. What heat sources do you prefer? Oil / Natural Gas / Propane / Geothermal

---

4. What would the heat distribution system be? Hydronic / HVAC / Thermal Massing / Passive

---

5. What other alternative energy systems may be installed.

---

6. Do you require air conditioning?

---

7. Do you have any window preferences?

---

8. Do you cook with gas?

---

9. Are you considering a central vacuum system?

---

10. How many TV's, phones and computers do you require and in what locations?

- TV's
- Phones
- Computers

11. What smart home technologies should be planned for? Home automation, mobile interface, etc.

---

12. What other alternative energy systems may be installed.

---

**If your home could talk, what should it say?**

3

1180 Commercial Drive, Farmington, NY 14425  
2675 NE Orchard Avenue, McMinnville, OR 97128



1. What is the image as you approach?

Discrete / Blend into the landscape / Defined as a subtle object / Bold / Artistic

2. What exterior materials?

---

3. What types of structure? Timber Frame / ICFs / SIPs / Other (Below):

---

4. What are your thoughts on symmetry vs. balance in plan and elevation?

---

5. What attributes of the structure create “the look” you are after? (circle ideas)

- a. Refined Contemporary - clean lines with a polished finish
- b. Earthy & Simple – grounding materials in a simple palette
- c. Rugged Modern – create contrast with clean lines and rough materials
- d. Mountain Relaxed – lodge style with timbers and some charm
- e. Traditional – old world style & richness in character
- f. Zen – subtle Asian influences for a calming feel
- g. Island – open concepts with movable walls
- h. Primal Design – getting back to the native vernacular

6. Should the design be Formal or Casual in nature?

---

7. Which rooms are vaulted or use ceilings to create differentiation?

---

8. Should the design allow level changes, or is single level living preferred?

---

9. Should there be a formal main entry? Please describe the experience, and who would use it.

---

10. Is there a Porte Cochere, or Carport?

---

11. Is there to be a secondary or social entry? What spaces would it open into? Who will use it?

---

12. Interstitial Space (the space in-between...) Where should outdoor living engage the home?

---

13. What types of outdoor living spaces are ideal? Deck / Screen Porch / boat dock / pool / BBQ

4

1180 Commercial Drive, Farmington, NY 14425  
2675 NE Orchard Avenue, McMinnville, OR 97128

[newenergyworks.com](http://newenergyworks.com) • 800.486.0661



---

14. Is the landscape formal, casual or natural?

---

15. Does the home speak of performance-based design, or are these systems integrated in a discrete manner?

---

16. Do you prefer simple or more complex rooflines?

---

17. What textures and colors do you like?

---

## THE ROOMS

List the activities and the amount of time you spend in the rooms below. Highlight the below for each

Which rooms have access to the outdoors?

Which rooms want view corridors and access to sunlight?

What flooring material do you envision in each room?

Please add any additional info you find pertinent to describe your vision.

Feel free to attach images of homes you like / don't like.

Also create folders within **Pinterest** and **Houzz** to highlight and share ideas if you wish.

### Living room / Great room

1. What activities take place in the living area?
2. How many people should it accommodate?
3. Should it have partitions and doors?
4. Should it be bright during the day?
5. Are there particular views or natural features of your site with which you want to interact from the inside?

### Kitchen

1. What times of the day and to what extent do you use the kitchen?
2. How many people should be able to use the kitchen at the same time?
3. Who cooks?
4. Will the kitchen be used for eating as well as for cooking?
5. Should the kitchen be able to accommodate people gathering in it?
6. What appliances are necessary?
7. Is there an arrangement of appliances and work spaces that suits you best?
8. Are there particular size requirements for appliances?
9. Do you like to be able to look out of the window while working in the kitchen?
10. Do you like a bright or sunlit kitchen?
11. How do you deal with waste and garbage?
12. Where and how would you like to store your food?
13. How much cupboard, drawer and counter space do you need?

5

1180 Commercial Drive, Farmington, NY 14425  
2675 NE Orchard Avenue, McMinnville, OR 97128

[newenergyworks.com](http://newenergyworks.com) • 800.486.0661



14. Do you like kitchen utensils, pots and pans to be visible or hidden?
15. What non-food items do you store in the kitchen?
16. Do you want a desk in the kitchen? A TV? Other non-kitchen items?
17. Should the kitchen be separated from the rest of the house or be open to other areas?

### Dining

1. What sort of feeling should the dining area have?
2. Is the dining area a single or multi-purpose place?
3. Does a formal dining area need to be separate from the normal family dining area?
4. How many people should the dining area accommodate?
5. What furniture or storage requirements do you have for this room?
6. Should there be physical access to the outside from this room?

### Master Bedroom

1. Do you like to wake up in a bright and or sunlit room?
2. Do you like to be able to look outside when lying in bed?
3. What is the size of the bed?
4. Do you prefer windows, a fan, or an air conditioner for air circulation?
5. What are the privacy requirements of the bedroom from the outside and from the rest of the house?
6. What floor level is preferred?
7. What are the storage requirements?
8. Will dressers, chests of drawers and armoires be used for non-hanging clothes storage or will this type of storage be built in?
9. Do you like a separate dressing area?
10. Does the bedroom also need to function as a study, TV room, or sitting room?
11. Would you feel comfortable if the bedroom had a cathedral area, or would you prefer a flat ceiling?

### Master Bath

1. What are the special qualities you like in a bathroom?
2. Does it need to be especially bright or roomy?
3. How private should the bathroom be from the rest of the house and from the outside?
4. Do you prefer fans or windows for air circulation?
5. Do you like to be able to see outside of a window while showering, washing, or using the toilet?
6. Do you use the bathroom in hurried or leisurely manner?
7. Do you prefer showers or baths?
8. Would you like room for more than one in the tub and/or shower?
9. Do you use the bathroom to dress or undress?
10. Do you have a preference for a particular brand of fixtures?
11. What requirements do you have for mirrors?
12. Do you prefer a linen closet in the bathroom?
13. What are your other storage requirements?
14. Do you like acrylic shower/tub units, solid surfacing or ceramic tiled shower walls?
15. Would you desire a separate shower?
16. Would you desire a whirlpool tub?

**Other bedrooms - Qty.** \_\_\_\_

6

1180 Commercial Drive, Farmington, NY 14425  
2675 NE Orchard Avenue, McMinnville, OR 97128

[newenergyworks.com](http://newenergyworks.com) • 800.486.0661



1. What are the privacy requirements of the bedroom from the outside and from the rest of the house?
2. What are the storage requirements?
3. Will dressers, chests or drawers and armoires be free standing furniture or will these be built in?
4. Do you like a separate dressing area?
5. Does the bedroom also need to function as a study, TV room, or sitting room?
6. What sleeping accommodations will be necessary for other family members in the future?

**Other bathrooms** - Qty. \_\_\_\_

1. Would there be a bathroom attached to one or more bedrooms?
2. How private should the bathroom be from the rest of the house and from the outside?
3. Do you need a bathroom easily accessible from the outside?

**Loft**

**Mudroom / Laundry / Utilities**

**Miscellaneous**

What kind of guest accommodations should be planned for?

What other rooms or activity areas?

Any additional storage requirements?

Is there a basement or attic? What configuration?

Do you prefer a Powder Room near the entry? (1/2 bath)

List the things that you can't do in your present environment that you would like to do in your new one.

Have you ever worked with an architect?

Have you built a home?

Has this survey been helpful?