



CASITA ADU



# FULL SERVICE DESIGN AND PROJECT MANAGEMENT

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Casitaadu.com

## California's Full Service ADU Company

### 2025 Catalog

**CASITA ADU** is pleased to provide comprehensive design, documentation, and project management services to meet the requirements of local planning and building departments, facilitating the acquisition of a building permit from start to completion. This proposal covers the preparation of a complete set of construction documents, fully compliant with city codes and regulations. All plans will adhere to the latest editions of the CRC, IBC, CBC, CMC, CPC, CEC, and Title 24 standards, ensuring alignment with current building requirements.

This is not a proposal, this is an example of services only.

# Who is Casita ADU?

Casita ADU is a full-service ADU development company based in Southern California, specializing in end-to-end project delivery from design and permitting through construction oversight.

1

## Phase One: Design & Permitting

This phase focuses on comprehensive plan development, including architectural drawings, engineering, Title 24 compliance, and submission to local jurisdictions for permit acquisition.

2

## Phase Two: Construction Oversight

Commencing post-permit, this phase involves managing your project through key milestones: site prep, foundation, framing, MEP, interior finishes, and final walkthrough.

3

## Permitting Services

Available at an hourly rate for title questions, permitting issues, and one-off consultations, specifically for support needed before the main project phases begin.

We do not act as the general contractor. Instead, we coordinate between you and our vetted builders, managing fund flow to ensure accountability, transparency, and milestone-based payments. Your trusted advocate for a simplified building process.

# Navigating Permit Requirements

Our Permitting Services provide essential hourly support to address your project's initial and unforeseen bureaucratic challenges, ensuring a smooth start before the main design and construction phases.



## Feasibility & Zoning

Expert guidance on specific title questions, zoning regulations, and the general feasibility of an ADU on your property.



## Document Review

Assistance with reviewing existing plans or preliminary documents to identify potential issues and ensure compliance before submission.



## Issue Resolution

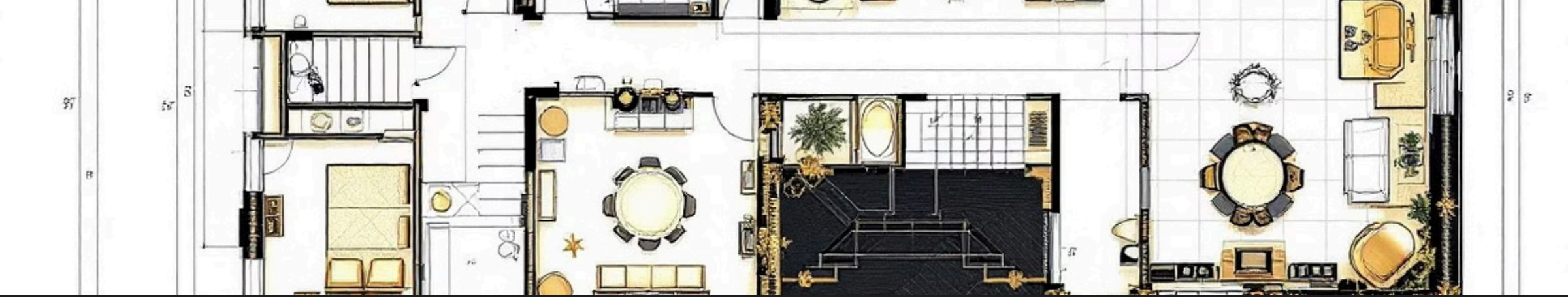
Dedicated support for unexpected hurdles or specific challenges encountered during the permitting process, helping to find solutions quickly.



## Strategic Consultations

One-off consultations to strategize the best approach for complex permitting scenarios or unique project requirements.

These services are designed to provide targeted assistance and are billed at an hourly rate, separate from the fixed fees for Phase One (Design & Permitting) and Phase Two (Construction Oversight).



# Scope of Work – Phase One

Design and develop comprehensive architectural plans for a room addition and remodel. The final square footage and layout will be determined in collaboration with the client during the design phase to ensure the project aligns with their vision and specific needs

# YOUR PERMIT PLAN BREAKDOWN



ARCHITECTURAL AND  
CONSTRUCTION DOCUMENTS



CODE AND REGULATORY  
COMPLIANCE ASSESSMENT



CALIFORNIA BUILDING STANDARD  
(TITLE 24)



STRUCTURAL ENGINEERING



MECHANICAL EVALUATION



ELECTRICAL, AND PLUMBING (EP)  
REQUIREMENTS



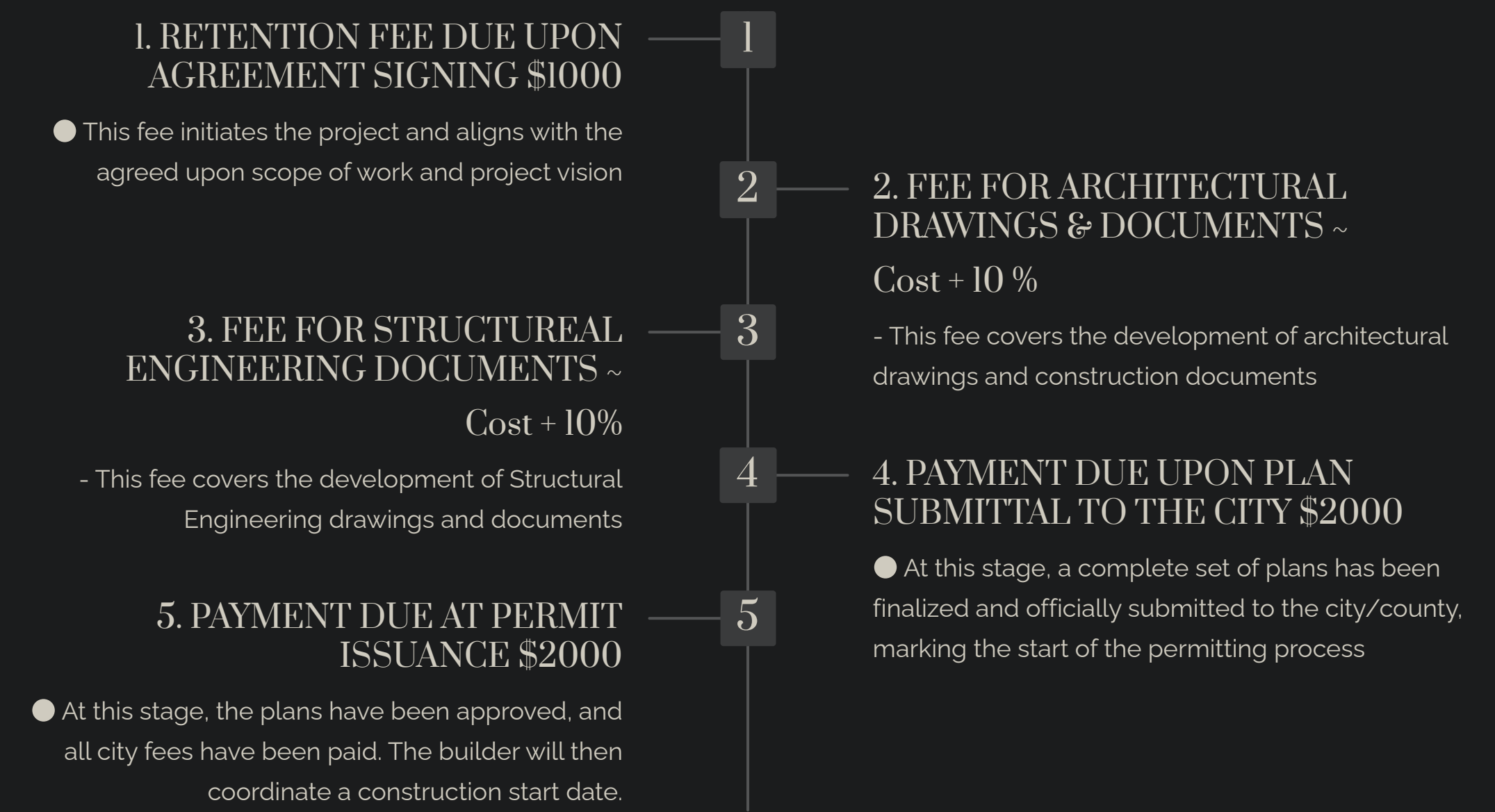
PERMIT PAPERWORK MANAGEMENT  
AND RESUBMISSIONS



PERMIT LOGISTICS & FULFILLMENT

# Total Payment Breakdown: Milestones, Terms, and Guidelines

The Client agrees to compensate CASITA ADU for the services outlined in this proposal.



# Potential Additional Permit Requirements

Depending on your project's specifics, the following permits and assessments may be required:

- **Site Plan Review:** Ensures the project aligns with zoning and land use regulations.
- **Soil and Geotechnical Analysis:** Assesses soil conditions for foundation design.
- **Environmental Impact Assessment:** Evaluates the project's effect on the environment.
- **Fire Safety Plan:** Compliance with fire safety regulations (e.g., escape routes, material flammability).
- **Grading and Drainage Plan:** Ensures proper water drainage and site grading.
- **Stormwater Management Plan:** Meets local and state regulations for runoff control.
- **Erosion Control Plan:** Prevents soil erosion during construction.
- **Accessibility Compliance:** Ensures adherence to ADA and other accessibility standards.
- **Energy Efficiency Report:** A comprehensive report on the project's energy efficiency.
- **Health Department Review:** Required for properties involving water, septic, or health-related aspects.
- **Noise Abatement Plan:** Required for projects in areas with noise restrictions.
- **Utility Connection Approval:** Coordination with local utilities for electricity, water, and sewage connections.
- **Historic Preservation Review:** Required for projects in historical areas (if applicable).
- **Archaeological & Cultural Resources Review:** Necessary for projects in areas of historical significance.
- **Tree Protection & Landscape Plan:** Protects trees and includes landscaping design.
- **Traffic Impact Study:** Analyzes the project's effects on local traffic flow (if applicable).

Other engineering or design services might be required, such as:


- Geotechnical and civil engineering
- Right-of-way permits (e.g., sidewalks, water meter, service upgrades)
- Mechanical, electrical, and security/fire protection systems
- Environmental, traffic, noise engineers, or landscape design, as needed.

Each project is unique, and these additional requirements will vary based on location, project scope, and other factors.




# SCOPE OF WORK – PHASE TWO: CONSTRUCTION MANAGEMENT


Once permits are issued, Casita ADU transitions into the role of Construction Management as an Agency. We support you through the entire build process, ensuring transparency, quality, and adherence to your vision, without performing the construction directly ourselves.

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## Contractor Selection

We facilitate a rigorous bidding process, securing a minimum of three competitive bids from qualified contractors to find the best fit for your project.
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## Estimate Validation

Our team meticulously reviews and validates all contractor estimates, ensuring accuracy, fairness, and alignment with your budget and project scope.
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## Milestone Monitoring

We diligently monitor all construction milestones, keeping your project on track and ensuring progress aligns with the agreed-upon timeline.
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## Plan Alignment

We ensure that all construction work strictly adheres to the approved plans, specifications, and quality standards, maintaining the integrity of your design.
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## Client Advocacy

Serving as your dedicated advocate, we guide you through final inspections and the project handoff, ensuring your complete satisfaction.

Please note: A separate agreement will be signed directly between the client and the selected contractor. Casita ADU will not collect or disburse construction funds and will not act as the contractor of record.

# Phase II: Construction Timeline Example

During Phase II, **CASITA ADU** will act as your dedicated Construction Management Agency, overseeing the entire construction process to ensure your project progresses efficiently, stays on budget, and meets the highest quality standards. We oversee the property site build, ensuring transparency and accountability, while the client manages direct cash flow to vendors. We complete this for a fee ranging between 8% and 15% of the build cost, however through negotiation with our select builders, this still comes in under budget for most clients.

## 1. Foundation & Framing

The critical first steps involve laying the foundation and erecting the structural framework of your new addition and remodeled areas, setting the blueprint for your vision.

## 2. Electrical, Plumbing, & HVAC Rough-in

Installation of all essential utility systems within the walls, including wiring, pipes, and ducts, ensuring your home is equipped for modern living.

## 3. Siding & Roofing

The exterior stucco is refinished, and roofing is completed, ensuring durability, weather protection, and curb appeal for your entire home.

## 4. Drywall & Insulation

Walls are sealed with insulation for energy efficiency and then covered with drywall, preparing surfaces for finishes.

## 5. Flooring Installation

New flooring is installed throughout the home, creating a cohesive and refreshed aesthetic from the ground up.

## 6. Painting & Interior Finishes

The application of interior paint and installation of fixtures, bringing color and character to each space, including your personal hair salon.



### Consultant & Project Management

CASITA ADU serves as your primary consultant, providing expert guidance and comprehensive project management from start to finish.



### Vendor Payment Coordination

We provide oversight and coordinate with you on all financial disbursements to vendors and suppliers. Direct payments are managed by the client.



### On-Site Build Supervision

Our team oversees the physical construction activities on your property, ensuring work adheres to plans and quality standards.



### Budget Adherence & Fees

We are committed to keeping your project under budget. Our Construction Management Agency fee will be no more than 15% of the operating budget, while most common is 10%.

Construction fees, labor costs and materials will affect overall cost. Client is responsible to fund any change orders off from original plan design. Client may need some, all, less than, or more of the construction services listed.

# CMA Fee Options

Our Construction Management Agency (CMA) fee structure is designed to offer flexibility and transparency, ensuring your project is managed efficiently from start to finish. We offer two primary options to suit your needs:

## Option 1: Percentage-Based Fee

Our most common approach, the CMA fee is a **percentage (ranging from 8% to 25%) of the total construction budget**, varying based on project size and scope. This fee directly correlates with the progress of your project, aligning with major construction phases and covering comprehensive oversight of all contractor activities. This fee will be adjusted if any change orders are enacted. Smaller projects typically incur a higher percentage, while larger projects receive a smaller percentage fee. See an example below:

- Client Maximum All-In Budget: **\$420,000**
- Negotiated Construction Budget: **\$350,000**
- CMA Fee (15% of construction budget): **\$52,500**
- Total Investment: **\$402,500**
- Total Savings: **\$17,500**

## Option 2: Fixed-Fee Structure

Alternatively, clients may opt for a predetermined **fixed CMA fee**. This option provides cost certainty upfront and follows the exact same detailed milestone payment schedule as the percentage-based fee. The key difference is that the fixed fee will not change, regardless of any change orders. This is ideal for clients who may anticipate modifications throughout the project or whose build plans are not yet fully finalized.

## Milestone Payment Schedule



Payment milestones are meticulously tracked alongside contractor billing and are rigorously reviewed in tandem with progress inspections to ensure accuracy and transparency.



# PAYMENT METHODS

All payments for services rendered by **CASITA ADU** can be made by check, payable to "**CASITA ADU**," or through our QuickBooks payment link. Alternatively, payments can also be made via **Zelle** using the phone number **619-891-2065**.

**Invoice Issuance (Retainer Fee):** The Client will receive an invoice for each payment outlined in the payment schedule (Section above 1 to 5) of this Agreement. Upon receipt of each payment, the Client will be issued a receipt, confirming acknowledgment of the payment and serving as a record of the transaction.

**Adherence to Payment Schedule:** The Client agrees to adhere to the payment schedule specified in the project contract or as mutually agreed upon by both parties.

**Bank Account Information:** Details for direct payments to CASITA ADU's bank account will be provided upon request or as necessary for processing payments.



# TERMS & RESPONSIBILITIES

Understanding the clear boundaries of our partnership for your project's success.

## Advisory & Oversight Role

Casita ADU operates exclusively as a Construction Management Agency, providing expert guidance and oversight. We do not hold a contractor's license, nor are we the builder responsible for construction contracts or warranties.

## Direct Client-Contractor Relationship

All construction work is performed under a separate, direct agreement between you, the client, and a licensed general contractor. You will select and sign contracts directly with all builders and subcontractors.

## Support & Coordination

We assist in vetting, selecting, and coordinating with licensed contractors, acting as a liaison throughout the project. Our role is advisory; we provide updates, support scheduling, and help troubleshoot on your behalf.

## Financial & Legal Clarity

Casita ADU will not accept, hold, or disburse any construction funds, nor will we direct subcontractor work or assume liability for construction quality. All financial and legal obligations for the construction phase are solely between the client and the licensed contractor.

## Change Orders & Adjustments

Any modifications to the approved plans after finalization may result in additional fees, which will be processed and approved as formal change orders.





# TERMS AND CONDITIONS




## ① Payment of City/County-Determined Plan Check and Permit Fees:


The Client is responsible for paying all plan check, school and permit fees directly to the city. The fee amounts will be determined by the city or county



# Agreement Terms



This agreement shall become effective as of the effective signed date and will continue until the Services have been completed and CASITA ADU has been paid in full for such Services.


<div></div> <div><b>Termination by CASITA ADU</b> CASITA ADU reserves the right to terminate this Agreement upon 20 days written notice if the Client fails to make payments in accordance with the terms specified herein. In such an event, CASITA ADU retains the right to collect partial or full payment for Services rendered up to the point of termination.</div>	<div></div> <div><b>Client Non-Performance</b> CASITA ADU may terminate this Agreement upon 20 days written notice if the Client substantially fails to fulfill the responsibilities outlined in this Agreement.</div>	<div></div> <div><b>Project Suspension by Client</b> CASITA ADU may terminate this Agreement upon 20 days written notice if the Client suspends the Project or the Consultant's services for a period exceeding 180 consecutive days.</div>
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**Limitation of Liability**

CASITA ADU shall have no liability to the Client arising from the termination of this Agreement, whether for non-payment, nonperformance, or project suspension.

Termination by Client:

<div></div> <div><b>Termination for Cause</b> The Client may terminate this Agreement if CASITA ADU substantially fails to fulfill the responsibilities outlined herein, with 20 days written notice.</div>	<div></div> <div><b>Termination for Convenience</b> Should the Client choose to terminate this Agreement for convenience and without cause, the Client shall be responsible for any termination-related expenses incurred by CASITA ADU, including reimbursable expenses.</div>
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**Payment Upon Termination**

In the event of termination under this Agreement, CASITA ADU shall be entitled to invoice the Client for full payment for all Services rendered and all reimbursable expenses incurred up to the effective date of termination. If the total amount due exceeds the retainer amount, the Client shall remit payment for the outstanding balance within twenty (20) business days from the date of the invoice.



### Use of Drawings/Plans

Upon receipt of full payment, the Client will have full rights to use the drawings and plans prepared by CASITA ADU, at their sole risk and without any liability or legal exposure to CASITA ADU.

### Media Release and Marketing Consent

The client agrees that CASITA ADU will document the entire construction process through photographs and videos and that a CASITA ADU sign will be displayed on-site during construction for marketing purposes. The client also consents to the use of some or all of this footage for educational and promotional activities.



### Unforeseen Circumstances or Changes in Project Scope

If unforeseen circumstances arise or there is a significant change in the Project's scope, such as a serious personal event (e.g., death in the family, serious illness, etc.), that materially alters the original terms and conditions of this Agreement, the Client may choose to terminate the Agreement. Termination under this provision must be preceded by mutual discussions to explore potential adjustments to the Agreement. If termination is still pursued, the Client shall compensate CASITA ADU for all services performed up to the termination date.

### Financial Hardship

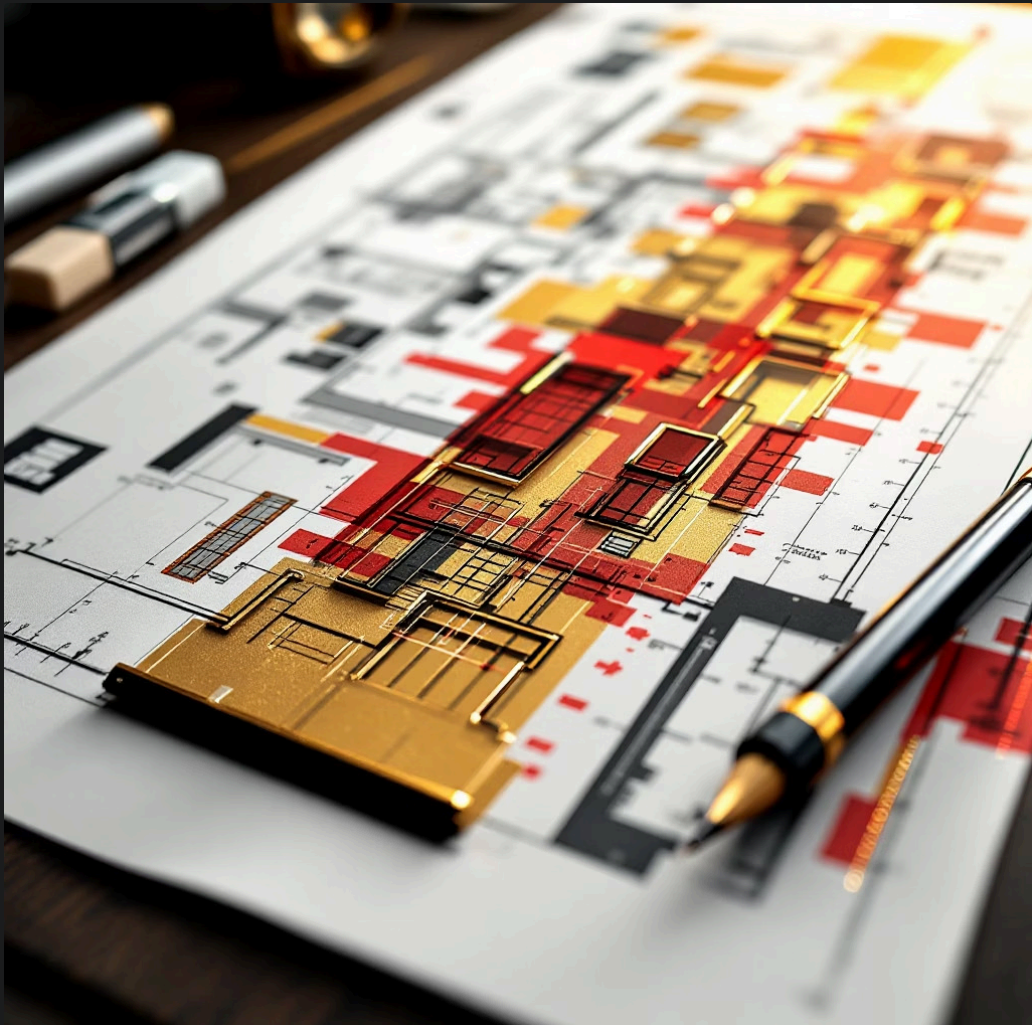
In the event that the Client experiences a documented financial hardship that renders them unable to continue with the Project, the Client may terminate this Agreement. The Client will remain responsible for any unpaid amounts for services already rendered and any reimbursable expenses incurred by CASITA ADU, in accordance with the Payment Upon Termination clause.



**Comprehensive Agreement**


This agreement shall bind and insure to the benefit of the parties and their respective heirs, personal representatives, successors and assigns. This Agreement, constitutes the final, complete, and exclusive statement of the agreement of the Parties with respect to the subject matter hereof, and supersedes any and all other prior and contemporaneous agreements and understandings, both written and oral, between the Parties. Any oral representations or modifications made prior to or after the execution of this agreement concerning subject matter of this agreement shall have no force or effect; provided, however, that this agreement may be subsequently modified in writing specifically referring to this agreement and signed by both parties. Upon completion of structural plans and initiation of permitting, the client will receive at least three construction estimates from CASITA ADU preferred builders, covering all aspects of project construction and completion.

The Client acknowledges that CASITA ADU is not the contractor and does not assume sole responsibility for the performance or quality of work of the builder selected by the Client. However, CASITA ADU shares responsibility with the Client by actively participating in the vetting process, leveraging its expertise to recommend qualified builders, and providing ongoing project management oversight to ensure the work meets agreed standards. This shared responsibility reflects CASITA ADU's commitment to supporting the Client throughout the project, ensuring the selected builder aligns with both parties' expectations. Please be aware that specific items may be excluded from the estimate or categorized as changes or custom orders, which will be subject to additional costs.



### Change Orders

Any significant changes made to the working drawings or plans after the final design has been approved will be treated as a change order. For the purposes of this agreement, a "significant change" is defined as any modification that requires more than three (3) hours of work. In the event of such changes, CASITA ADU will provide the Client with an estimate for the additional work required within a maximum of five (5) business days to minimize delays. The change order will not proceed without explicit written approval from the Client, ensuring that all adjustments align with the Client's expectations and project timeline.

**Severability**

If any term, provision, promise, or condition of this agreement is determined by a court of competent jurisdiction to be invalid, void or unenforceable, in whole or in part, the remainder of the agreement shall remain in full force and effect and shall in no way be affected, impaired or invalidated.

**No Third-Party Beneficiary Rights**

No provision in this Agreement is intended or shall create any rights with respect to the subject matter of this Agreement in any third party.



# DISPUTES

In the event CASITA ADU or Client shall have any claim against the other arising out of this Agreement, they shall attempt in good faith to informally resolve the dispute or otherwise agree upon the rights of the respective parties with respect to such claims. If informal resolution cannot be reached then any claim or dispute arising out of this Agreement shall be subject to mediation, before a mutually agreed-upon mediator, as a condition precedent to arbitration or the institution of legal or equitable proceedings by either party.



## Responsibilities and Limitations

CASITA ADU will oversee and coordinate the construction means, methods, techniques, sequences, and procedures employed by the General Contractor, ensuring they align with the project's design plans and specifications. While the Contractor remains responsible for implementing safety precautions and programs associated with their work, CASITA ADU will monitor these aspects to promote compliance with applicable safety standards.



## Project Management

CASITA ADU will serve as the project manager, working in collaboration with the chosen builders and subcontractors to ensure the successful completion of the project from start to final inspection. As part of our commitment, CASITA ADU will assist the client in selecting qualified vendors who aligns with the project's requirements and goals. We will oversee the coordination of all phases, including planning, construction, and compliance, ensuring a seamless process and adherence to quality standards



## Arbitration

If informal resolution or mediation fails to resolve the claim or dispute, either party may initiate arbitration proceedings, unless the amount of damages is contested in pending litigation with a third party, in which case arbitration will be delayed until the amount is determined or both parties consent to arbitration. The arbitration shall be conducted by a mutually agreed-upon arbitrator. The arbitration may be facilitated by the American Arbitration Association, Judicial Arbitration, Mediation Services, or Alternative Adjudication Services, or, if agreed upon by both parties, a retired judge from an arbitration panel. California Code of Civil Procedure Sections 1285 through 1289 shall apply to the arbitration. The arbitrator's decision regarding the validity and/or amount of any claim under this provision shall be binding on the parties. Any arbitration award may be enforced in court. The prevailing party in any enforcement proceedings shall be entitled to recover reasonable attorney's fees and cost.



# TERMS & RESPONSIBILITIES AT A GLANCE

Casita ADU operates as a Construction Management Agency, providing comprehensive project oversight and support. It is crucial to understand our role and the distribution of responsibilities to ensure a clear and successful partnership.

## Our Core Role: Management & Advisory

Casita ADU operates as a **Construction Management Agency** and does not hold a contractor's license. We serve in an **advisory and oversight role only**, ensuring project alignment with design plans and client goals.

## Client-Contractor Relationship

Casita ADU is **not the builder** and will not enter into or be responsible for construction contracts, warranties, or contractor obligations. All construction work will be performed under a **separate agreement directly between the client and a licensed general contractor**.

## Support & Coordination

Casita ADU will **assist in vetting, selecting, and coordinating** with licensed contractor(s) and act as a **liaison** throughout the project. We provide updates, support scheduling, and help troubleshoot on the client's behalf.

## Financial and Legal Clarity

Casita ADU will **not accept, hold, or disburse any construction funds** on behalf of the client, nor will we make payments to contractors. All financial and legal obligations for construction are the responsibility of the licensed contractor and client.

Any significant changes to plans after finalization may incur additional fees, approved as formal change orders, to maintain project scope and budget clarity.

# Thank you for trusting us with your project

We're excited to work alongside you, ensuring your project meets all requirements. Together, we'll aim for excellence and ensure its success.

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