

# 1/F2 PROJECT PLAN

Red text indicates where data is to be added. Change to black text once this has been done.  
Blue text is advisory and can be deleted.

Revision/date	Notes
A YY/MM/DD	Save each revision as a pdf with the date in the format: ProjectPlan_YYMMDD
B YY/MM/DD	
C YY/MM/DD	

Project name and location	Add data as appropriate
Project number	
Project name	
Project address	
Brief description of the project	

Project team	Add data or <b>highlight</b> relevant option as appropriate	
Partner/Director		
Project Architect		
BIM Task Team Manager		
Other team members		
Principal Designer (PD)	Company name Project PD (Name of individual heading up the PD work)	
Client	Company, address, phone, email, VAT no. and company registration number	
Project manager	Company name	Subconsultant: Yes   No
Planning consultant	Company name	Subconsultant: Yes   No
Structural engineer	Company name	Subconsultant: Yes   No
Services engineer	Company name	Subconsultant: Yes   No
BIM Information Manager	Company name	Subconsultant: Yes   No
Add others as required	Company name	Subconsultant: Yes   No
Project Stakeholders	Name, address, phone, email Add further lines where more than one company/individual	

Programme	If not known give best estimate or insert 'N/A' if not in appointment	If not known give best estimate or insert 'N/A' if not in appointment
<b>RIBA work stage</b>	<b>Starts</b>	<b>Ends</b>
Stage 0	Stage 0 is not usually part of the architect's commission	Stage 0 is not usually part of the architect's commission
Stage 1		
Stage 2		
Stage 3		
(Planning)	Target planning submission date	Anticipated planning decision date
Stage 4 pre-tender/Employer's Requirements		
Procurement/tendering		
Stage 4 post-tender/under Building Contract		
Stage 5		
Stage 6		
Stage 7 (separate appointment)		

Sector/s	Indicate the primary sector and sub-sector by highlighting yellow. Where the development is mixed use, indicate secondary sector(s) by highlighting green
<b>Primary sector</b>	<b>Sub-sector/use class</b>
Retail	A1   A2   A3   A4   A5
Commercial	B1
Industrial	B2   B8
Residential	C1   C2   C2A   C3   C4
Education	School   Further education   Higher education   Other
Transport	Airport   Rail   Other [note type]
Healthcare	Hospital   Clinic   Other [note type]
Other	[note type]

CAD/BIM	Add data or <b>highlight</b> relevant option as appropriate
CAD   BIM	CAD   Level 1   Level 2
EDMS	4P   Aconex   Asite   Conject   Livelink   ProjectVault ProjectWise   SharePoint
Unique Property Reference Number (UPRN)	

Project description and statutory approvals	Add data or <b>highlight</b> relevant option as appropriate
Mission statement	Note the key drivers and targets for this project
Environmental standards	RIBA 2030 Challenge   BREEAM   Lifetime Homes   DEC   EPC   Passivhaus   LEED Project-specific carbon target   SKA   CEEQUAL   Building Regs
Estimated construction cost	Up to: £1m   £5m   £10m   £25m   £50m   £100m   £100m+
Building type	New build   Refurb   New + refurb
Statutory compliance	Listed Grade I   Listed Grade II   Listed Grade II* Conservation area
Consultation	20th Century Society   Charities Commission   Environment Agency   Georgian Group   GLA   Historic England   LLDC   Local authority   Local residents' groups   ODA   Sport England   TfL   The Mayor's Office   Victorian Society
Building height	1-3 storeys   4-6 storeys   7+ storeys For insurance purposes, will the building be over 18m from ground level to top habitable floor? Yes   No
Distance from studio	For the purposes of identifying long distance travel requirements and how the project will be serviced
Version of Building Regulations used	When known, insert the version being used for this project

Commercial data	Add data or <b>highlight</b> relevant option as appropriate
Date of initial enquiry	YY/MM/DD
Probability of appointment	25% [@ YY/MM/DD] 50% [@ YY/MM/DD] 100% [@ YY/MM/DD]
Fee type	Fixed   Percentage   Hourly rate   Speculative   Target cost   Pro bono
Scope of services	Full service   Principal Designer (in-house)   Contract administration   Landscape   Interior designer   Feasibility study   Planning application   Urban design   Masterplanning   Conservation   Client adviser   POE   NEC supervisor

Construction contract	JCT Standard   JCT D&B   JCT CM   NEC   GC Works   Bespoke
Procurement	Traditional   Single stage D&B   2 stage D&B   CM   Developer/contractor procured
Target profit	XX% @ date
Confidentiality agreement	Yes   No
Soft Landings	Yes   No
<b>Commercial data</b>	<b>Add data as appropriate</b>
Commercial risks to be managed	@ Bid stage [note risks here]
	@ Start-up [note risks here]
	@ Planning Application [note risks here]
	@ Tender stage [note risks here]
	@ Construction [note risks here]

Hourly rates	@ [date]	@ [date]	@ [date]	@ [date]
Partner/Director	£	£	£	£
Associate	£	£	£	£
Architect	£	£	£	£
Part 2	£	£	£	£
Part 1	£	£	£	£
Other	£	£	£	£

Status of key documents	Date completed
Architect's appointment and fee	YY/MM/DD
Scope of services	YY/MM/DD
Fee cashflow	YY/MM/DD
Project Brief	Strategic   Initial   Final [@ YY/MM/DD]

Status of key documents	Date completed
Design Programme	YY/MM/DD
Responsibility Matrix	YY/MM/DD
Design team schedules of services	YY/MM/DD
Project document numbering standard	YY/MM/DD

Architect's appointment	
Legal review by insurers	YY/MM/DD
Legal review by solicitors	YY/MM/DD
Letter of intent/client care letter	YY/MM/DD
Appointment executed and filed	YY/MM/DD
Level of PI cover being provided	

Subconsultant's appointment	
Name	
Letter of intent	YY/MM/DD
Draft agreement issued to subconsultant	YY/MM/DD
Agreed	YY/MM/DD
Executed	YY/MM/DD
<a href="#">Add further rows as required</a>	

Project Strategies	Project Strategies are to be prepared in outline at Stage 2 and in detail at Stage 3. For guidance refer to the RIBA Plan of Work Overview
Technology (IT and BIM)	
Communication	
Building control	
Procurement	
Construction	
Plan for Use	
Sustainability	

**Project activities**

This schedule is to be read in conjunction with the Scope of Services.

If an activity is not applicable, insert 'N/A'. If an activity has commenced but is not completed, note 'Ongoing'.

The activities listed here can be amended to suit an individual practice's approach to projects but they are broadly applicable to most projects.

<b>Stage/ reference</b>	<b>Activity</b>	<b>Date completed</b>
<b>STAGE 0</b>	<b>Strategic Definition</b>	
0.01	Check for any conflict of interest	
0.02	Preliminary site inspection and appraisal	
0.03	Initial viability assessment/development appraisal	
<b>STAGE 1</b>	<b>Preparation and Briefing</b>	
1.01	Notify any previous architects involved with the project	
1.02	Site Information/Pre-Construction Information	
1.03	Review relevant town planning policies, etc.	
1.04	Project Programme and Information Exchanges	
1.05	Project directory	
1.06	Project Roles Table	
1.07	Feasibility Studies	
1.08	Consultations with authorities; initial planning enquiries	
1.09	Statutory services enquiries	
1.10	Consultation with third parties	
1.11	Advise client on statutory and other legal obligations	
1.12	Monitor resource cost/fee income	
1.13	Review Project Risks	
1.14	CDM HEMS	
1.15	Client instruction to proceed to Stage 2	
<b>STAGE 2</b>	<b>Concept Design</b>	
2.01	Design Programme	
2.02	Architectural Concept	
2.03	Prepare Outline Specification	
2.04	Design Review(s)	
2.05	Assess need for party wall notices/rights to light/daylighting studies	

2.06	Establish Project Strategies	
2.07	Specialist areas of design/specialist subcontractors	
2.08	Highways, drainage, water, gas and electricity, etc.	
2.09	Review HEMS	
2.10	Client Health and Safety File requirements	
2.11	Monitor resource cost/fee income	
2.12	Review construction Cost Plan against the design	
2.13	Pre-application submission(s)/outline or full Planning Application as appropriate	
2.14	Stage Report	
2.15	Client instruction to proceed to Stage 3	
<b>STAGE 3</b>	<b>Spatial Coordination</b>	
3.01	Spatially Coordinated design	
3.02	Review/update Project Strategies	
3.03	Design Studies and construction cost review	
3.04	Approvals	
3.05	Technical review(s)	
3.06	Pre-construction Health and Safety information	
3.07	Review HEMS	
3.08	Monitor resource cost/fee income	
3.09	Review Project Risks (non-CDM)	
3.10	Pre-application submission(s) and Planning Application	
3.11	Stage Report	
3.12	Client instruction to proceed to Stage 4	
<b>STAGE 4</b>	<b>Technical Design</b>	
4.01	Drawing programme/schedule	
4.02	Finalise Project Strategies	
4.03	Technical design information	
4.04	Outstanding approvals	
4.05	Building control enquiries and application	

4.06	Performance specifications	
4.07	NBS specification	
4.08	Highways, drainage, water, gas, electricity supplies, etc.	
4.09	Party wall and foundation notices	
4.10	Technical review(s) and construction cost review	
4.11	Review Project Risks (non-CDM)	
4.12	Review HEMS	
4.13	Planning Conditions	
4.14	Monitor resource cost/fee income	
<b>STAGE 5</b>	<b>Manufacturing and Construction</b>	
5.01	Information for Health and Safety File	
5.02	Information for building log book (Building Regulations Part L2)	
5.03	Information release in accordance with Building Contract	
5.04	Construction Programme (by Principal Contractor)	
5.05	Site inspections	
5.06	Site meetings	
	<b>If Contract Administrator</b>	
5.07	Clerk of works/site staff	
5.08	Contractor's insurance (or by quantity surveyor)	
5.09	Client insurance if refurbishment	
5.10	Contractor's programme and information required schedule	
5.11	Issue contract documents	
5.12	Pre-contract meeting	
5.13	Contract administration	
5.14	Monitor progress and programme	
5.15	Claims	
5.16	Practical Completion certificate	

5.17	Asset Information from contractor	
5.18	Set up notification for end of defects/maintenance period	
5.19	Health and Safety File	
5.20	Record date for end of 6/12-year liability period	
	<b>If novated</b>	
5.21	Notify client and contractor about novation switch	
<b>STAGE 6</b>	<b>Handover</b>	
6.01	Post-completion review	
6.02	Client feedback	
6.03	Review and record performance of completed works	
6.04	Prepare material for archiving	
	<b>If contract administrator</b>	
6.05	Defects inspection	
6.06	Certificate of making good defects	
6.07	Claims	
6.08	Final Certificate	
<b>STAGE 7</b>	<b>Use</b>	
7.01	Periodic contact with the building occupier and/or owner	
7.02	Agree fees for any work required	
7.03	Record building performance	
<b>Procurement</b>	<b>Note: procurement of the contractor is a flexible task that typically occurs between Stages 2 and 4. It may be undertaken by the client, the project manager, the quantity surveyor or the architect.</b>	
P 0.01	Collate final tender documentation	
P 0.02	Prepare tender lists and agree with client	
P 0.03	Main contract tenders	
P 0.04	Subcontract tenders	
P 0.05	Check all necessary statutory and other consents obtained and party wall awards in place	
P 0.06	Confirm with client: - phasing, restrictions - work not forming part of Building Contract to be carried out by others - insurance arrangements - form of construction contract	

	<ul style="list-style-type: none"> <li>- tendering period and procedures to be followed</li> <li>- optional provisions and particulars for Building Contract</li> <li>- final tender list</li> <li>- instruction to proceed given and confirmed in writing</li> </ul>	
P 0.07	Final information for pre-construction Health and Safety information	
P 0.08	<p>If specialist subcontractors or suppliers involved:</p> <ul style="list-style-type: none"> <li>- written confirmation from client for inclusion of firms proposed</li> <li>- willingness/availability of these firms</li> <li>- tender action</li> <li>- quality assurance procedures and compliance with Health and Safety matters</li> <li>- review tenders</li> <li>- cost checking</li> <li>- appraise specialist tenders and notify all tenderers of decision</li> </ul>	
P 0.09	Appraise tenders and prepare report (or assist in preparing report) with recommendations for client	
P 0.10	Post tender-receipt actions if cost too high	
P 0.11	Notify successful tenderer and arrange for signing of contract documents	
P 0.12	Notify unsuccessful tenderers	
P 0.13	Where providing design services to the contractor (e.g. on novation) obtain PI certificate from contractor	