STAGE 3

Spatial Coordination

Job no

Job Title

Team members

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Instruction for use

This checklist is an rtf (rich text format) form, optimised for editing in Microsoft Office Word. Parts of it have been temporarily locked to preserve the default wording found in the *RIBA Job Book* (Ninth Edition). The parts that are not locked are the check boxes, the 'notes' fields and the 'completed on' fields. In other words, it is possible to add your own text and subsequently edit these fields.

It is recognised that the default wording, which is currently locked, may need to be added to and edited. To unlock it, please follow the instructions below:

Microsoft Office Word 2003

- Select *View>Toolbars>Forms* from the main menu. The *Forms* toolbar will appear.
- Click the *Protect Form* button to unlock the checklist. To lock it again, click it again.
- If needed, click the *Form Field Shading* button to hide the grey shading that appears around the editable fields. To show it again, click it again.

Microsoft Office Word 2007

- Click the Office button to bring up a menu. Select *Word Options* from the bottom of the menu.
- The *Word Options* dialog window will open. Select the *Show Developer Tab* option. At the bottom of the window, click *OK.*
- A new *Show Developer* tab appears at the top of your screen. Click on it.
- In the *Protect* group, select *Protect document*. A window will appear on the right-hand side of your screen.
- In this window, select *Stop protection* from the bottom of the list.

Microsoft Office Word 2010

- Click the *File* tab to bring up a menu. Select *Word Options* from the bottom of the menu.
- The *Word Options* dialog window will open. Select the *Customize Ribbon* option.
- Select *Developer* box in the right hand side menu and click OK on the bottom of the screen.
- A new *Show Developer* tab appears at the top of your screen. Click on it.
- In the *Protect* group, select *Restrict Editing*. A window will appear on the right-hand side of your screen.
- In this window, select *Stop protection* from the bottom of the list.

3.1	Client team

3.1.1	Check whether the client has confirmed acceptance of the Architectural Concept submitted at Stage 2 (ideally in writing). Establish points to be discussed and developed during Stage 3.		
	Enter notes here	☐	*Completed on*
3.1.2	Advise the client on the need to appoint further consultants and specialists.		
	Enter notes here	☐	*Completed on*
3.1.3	Alert the client to any matters raised during discussions with statutory or other bodies which might affect the proposals. Explain the implications and discuss what actions should be taken.		
	Enter notes here	☐	*Completed on*
3.1.4	Advise the client about any proposals to introduce innovative design or construction ideas or the specifying of relatively new materials, and ask the client to confirm awareness of these in writing.		
	Enter notes here	☐	*Completed on*
3.1.5	Ask the client for information and requirements concerning processes, plant and other installations, room layouts and equipment, etc. and record this information appropriately, if not already included in the final Project Brief. Check on particular requirements concerning the life expectancy of components, fittings and installations, and performance requirements for environmental and services aspects, etc.		
	Enter notes here	☐	*Completed on*
3.1.6	Check whether the client wishes the project to be planned to allow for phasing of completion or for completion to follow a particular sequence. This might have design implications.		
	Enter notes here	☐	*Completed on*
3.1.7	Report regularly to the client on fees and expenses incurred, and submit accounts at		

	agreed intervals.	
	Enter notes here	☐ *Completed on*

3.2.1	Establish or review project quality management procedures together with relevant procedures of all design team members.	
	Enter notes here	☐ *Completed on*

3.2.2	Check the scope of professional services agreed with other consultants as they are appointed.	
	Enter notes here	☐ *Completed on*

3.2.3	Agree input to the stage by design team members.	
	Enter notes here	☐ *Completed on*

3.2.4	Confirm the programme and pattern for design team meetings.	
	Enter notes here	☐ *Completed on*

3.2.5	Monitor, coordinate and integrate input from design team members and specialists.	
	Maintain close collaboration with consultants and specialists. The architect might not be responsible for their individual performance, but will usually, as lead designer, be responsible for facilitating the coordination and integration of their work into the overall design.	
	Enter notes here	☐ *Completed on*

3.2.6	*During this stage the structural engineer should collaborate in developing the design, and advise on structural options and preferred solutions. The architect is responsible for coordination and integration of these into the overall design concept. This will include checking that structural proposals are compatible with the space and access requirements of the services installations.*	
	The structural engineer should produce the initial structural design, prescribe profiles, basic specifications and building tolerances, define basic rules for voids and holes which might need to be provided and which might affect the	

structure, and take steps as necessary to establish compliance with statutory requirements. They will provide information for the elemental and firm Cost Plan, and should contribute information and advice for inclusion in the Stage 3 report to the client.

Enter notes here   ☐ *Completed on*

| 3.3 | **Construction team** |

| 3.3.1 | Appraise input from specialist firms, including potential subcontractors and suppliers. |

Enter notes here   ☐ *Completed on*

| 3.3.2 | Identify any performance-specified work or contractor's designed portion items. |

Enter notes here   ☐ *Completed on*

| 3.3.3 | Discuss with the client and the design team whether any preliminary tender action for specialist subcontractors and suppliers will be required. |

Enter notes here   ☐ *Completed on*

| 3.3.4 | Check whether the client has decided the method of procurement, and confirm any decision in writing. If no decision is reached, explain the importance of reaching a decision before the detailed design is developed. The procurement method could affect the amount and type of design information needed at this stage. |

Discussions about which method of procurement is to be used should start in Stage 1 as it can affect the design process.

Enter notes here   ☐ *Completed on*

| 3.3.5 | Confirm the procurement method in writing and the form of contract to be adopted. |

Enter notes here   ☐ *Completed on*

| 3.3.6 | Discuss with the client and the consultant team whether any action will be needed on advance orders (noting the risk involved in placing orders in advance of planning permission being granted). |

Enter notes here   ☐ *Completed on*

3.3.7	Identify works packages where applicable.		
	Enter notes here	☐	*Completed on*
3.4	**Cost**		
3.4.1	*The cost consultant should collaborate with the architect and other consultants to develop and refine the full Cost Plan as the design is developed and Outline Specification notes are prepared.*		
	During this stage the cost consultant will prepare an elemental Cost Plan followed by a firm Cost Plan and cash flow forecast, relying on input from other design team members, and will advise on cost effects of compliance with statutory requirements. The cost consultant should contribute information and advice for inclusion in the Stage 3 report to the client.		
	Enter notes here	☐	*Completed on*
3.4.2	Discuss with the design team and the client the effect of major design decisions on the allocations within the Cost Plan before they are taken.		
	There must be regular two-way exchange of information if designers are to keep within cost targets or limits.		
	Enter notes here	☐	*Completed on*
3.4.3	Provide the cost consultant with information on the Cost Plan and cash flow projection (or prepare a cost estimate if appointed to do so).		
	Enter notes here	☐	*Completed on*
3.4.4	Report to the client on cost matters at agreed intervals.		
	If procurement is through design and build for a contractor client, provide information to other consultants and the contractor's estimators to cost detailed proposals.		
	Enter notes here	☐	*Completed on*
3.5	**Other activities**		

3.5.1	Confirm the stage timetable for services, and check this against the Project Programme as agreed with the client and Project Lead. The programme should show critical points by which information from the client and design team members will be required.		
	Enter notes here	☐	*Completed on*
3.5.2	Check progress against the timetable for services regularly.		
	Enter notes here	☐	*Completed on*
3.5.3	Continue resource control procedures for the job.		
	Check expenditure against the office job cost allocation for Stage 3.		
	Monitor fee income against the projections.		
	Enter notes here	☐	*Completed on*
3.5.4	Prepare the Spatially Coordinated design, including coordinated and updated proposals for structural design, services systems and landscaping, Outline Specification, Cost Plan and Project Strategies.		
	Start to draft preliminary specification notes and collate information as it comes to hand. Specification writing is part of the design process and should be undertaken by the designer.		
	Enter notes here	☐	*Completed on*
3.5.5	Undertake Design Studies at regular intervals as required.		
	Enter notes here	☐	*Completed on*
3.5.6	Finalise the Spatially Coordinated design. The presentation to the client of Stage 3 proposals is particularly important. Establish early how this is to be done and prepare the material accordingly. It will usually entail a written report and visual material and may require an oral presentation.		
	At the conclusion of Stage 3, get the client to sign off the Spatially Coordinated design. Beyond this point, any changes originated by the client might mean abortive work and additional expense.		

	Enter notes here	☐ *Completed on*
3.5.7	Review and update the Project Execution Plan.	
	Enter notes here	☐ *Completed on*
3.5.8	Prepare the Stage Report and submit it to the client.	
	Enter notes here	☐ *Completed on*

<table>
<tr><td>3.6</td><td colspan="2">BIM and digital technology</td></tr>
<tr><td>3.6.1</td><td>If appointed as information manager:

• assist members of the design team to develop the design using the BIM model, ensuring that data-sharing protocols are followed

• check and sign off the BIM model at agreed stages

• issue or assist in the issue of design data at agreed times throughout the development of the design

• assist in the development of data relative to the agreed level of definition

• assist in the integration into the BIM model of data from contractors, subcontractors and suppliers.</td><td></td></tr>
<tr><td></td><td><i>Enter notes here</i></td><td>☐ <i>Completed on</i></td></tr>
<tr><td>3.6.2</td><td>Develop and integrate generic and bespoke design components.

<i>BIM data can be used for environmental performance and area analysis.</i></td><td></td></tr>
<tr><td></td><td><i>Enter notes here</i></td><td>☐ <i>Completed on</i></td></tr>
<tr><td>3.6.3</td><td>Export data as appropriate from the BIM model to enable preparation and submission of the application for full planning permission, listed building consent and conservation area consent as relevant and if instructed by the client. Ensure that all applications are accompanied by relevant documents, including payment by the client of the appropriate fee.</td><td></td></tr>
<tr><td></td><td><i>Enter notes here</i></td><td>☐ <i>Completed on</i></td></tr>
<tr><td>3.6.4</td><td>Share and integrate data for design coordination and detailed analysis of the design, including</td><td></td></tr>
</table>

data links between models.

Enter notes here

☐ *Completed on*