

STAGE 7

Use

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.

7.1

Client team

7.1.1

Agree the terms of the appointment and how fees will be paid.

There are potential benefits to maintaining an ongoing relationship with the client and this should be considered in negotiating services for Stage 7 work. Such a relationship might well lead to further work in future, either in refurbishment or alteration of the building in question or for other building projects. This opportunity should not be overlooked.

Enter notes here

Completed on

7.1.2

Maintain periodic contact with the building occupier and/or owner.

Enter notes here

Completed on

7.1.3

Check to see if the client wishes to undertake a BREEAM In-Use assessment of the building in operation and agree the scope of the service and the fee.

BREEAM In-Use is a scheme to help building managers reduce the running costs and improve the environmental performance of buildings.

Enter notes here

Completed on

7.1.4

Check if the client wants to instruct a POE exercise and, if so, agree the scope of services and the fee.

Enter notes here

Completed on

7.1.5

Advise the client of the need to employ other consultants and the contractor.

Enter notes here

Completed on

7.1.6

Discuss with the client whether it would be permissible to carry out a survey of the building in use some time after completion.

Enter notes here

Completed on

7.1.7

Explain to the client the purpose of a debriefing

	<p>exercise or full post-project evaluation and that their feedback might be a key part of this activity. Discuss to what extent key people in the organisation could be expected to contribute opinions at a meeting. This meeting could be chaired by the architect.</p> <p><i>Enter notes here</i></p>	<input type="checkbox"/> <i>Completed on</i>
7.1.8	<p>Arrange a meeting with key personnel from the client organisation (the building users and maintenance staff). Ensure that you have considered your objectives and what information you want to get from this exercise and have a clear agenda for the meeting.</p> <p><i>Enter notes here</i></p>	<input type="checkbox"/> <i>Completed on</i>
7.1.9	<p>Discuss with the client to what extent the managers and users of the project could be expected to cooperate in completing a questionnaire.</p> <p><i>Enter notes here</i></p>	<input type="checkbox"/> <i>Completed on</i>
7.1.10	<p>Discuss with the client whether authorised photographers would be allowed access after final completion, for Feedback purposes.</p> <p><i>Enter notes here</i></p>	<input type="checkbox"/> <i>Completed on</i>
7.2	Design team	
7.2.1	<p>It may well be necessary to form collaborations with building services consultants or others to provide a comprehensive service for Stage 7. You should engage in discussions with appropriate companies to allow you to offer multidisciplinary services where necessary.</p> <p><i>Enter notes here</i></p>	<input type="checkbox"/> <i>Completed on</i>
7.3	Other activities	
7.3.1	<p>Carefully consider the activities required to undertake Stage 7 services and agree the scope of work with the client, who may be the building occupier, the owner or a contractor to whom you are providing consultancy services.</p>	

	<p><i>Activities to be carried out in Stage 7 should be identified as an additional service and as a separate appointment, so as not to extend the usual liability period, typically six or 12 years after Practical Completion.</i></p> <p><i>Enter notes here</i></p>	<input type="checkbox"/> <i>Completed on</i>
7.3.2	<p>If appointed for this stage, update the project information as required in response to client Feedback and modifications in use.</p> <p><i>Enter notes here</i></p>	<input type="checkbox"/> <i>Completed on</i>
7.3.3	<p>Record building performance.</p> <p><i>Enter notes here</i></p>	<input type="checkbox"/> <i>Completed on</i>
7.3.4	<p>Consider the desirability of a full Feedback study or a post-project evaluation.</p> <p><i>Enter notes here</i></p>	<input type="checkbox"/> <i>Completed on</i>
7.3.5	<p>Year 1:</p> <ul style="list-style-type: none"> • Recalculate capital and revenue target costs at current rates. • Identify the actual capital costs. <p><i>Enter notes here</i></p>	<input type="checkbox"/> <i>Completed on</i>
7.3.6	<p>Year 2 (and 3):</p> <ul style="list-style-type: none"> • Identify/provide data required for the review. • Agree a programme of meetings. • Identify the issues, establish causation and consider remedies. • Contribute to the output reports and recommendations. • If instructed, implement the recommendations. <p><i>Enter notes here</i></p>	<input type="checkbox"/> <i>Completed on</i>
7.3.7	<p>Participate in the BREEAM In-Use assessment process if required.</p> <p><i>Enter notes here</i></p>	<input type="checkbox"/> <i>Completed on</i>
7.4	BIM and digital technology	

7.4.1

If appointed for this stage, agree the programme of maintenance and scope of work to maintain the BIM model.

Information from work carried out during this stage can be invaluable in informing briefs for future projects.

Enter notes here

Completed on