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| **STAGE 3** |
| Spatial Coordination |

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| **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* (Tenth 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.

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|  | Activities |  | |  |
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| 1. | Review and update the project execution plan, including the change control procedures, construction strategy, and health and safety strategy.  *Enter notes here* | Completed on | |  |
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| 2. | Confirm in writing with the client the proposed procurement method and the form of contract to be adopted.  *Enter notes here* | Completed on | |  |
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| 3. | Advise the client on the need to appoint further consultants and specialists, which might include:  • Party wall surveyor.  • Daylight/sunlight/rights to light consultant.  • Landscape architect.  Enter notes here | Completed on | |  |
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| 4. | Assess what input will be required from specialist firms, including potential subcontractors and suppliers.  Discuss with the client and the design team:  • Whether any preliminary tender action for specialist subcontractors and suppliers will be required.  • 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* |  |
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| 5. | Confirm the programme and pattern for design team meetings.  *For small projects it may not be necessary to hold formal design team meetings but if they are required, you must ensure that everyone in the team is aware of the design programme and when they need to provide information to others. You must also ensure the design outputs are* *properly reviewed and coordinated. The lead designer is responsible for facilitating the coordination of all information and its integration into the general scheme*.  *If you know suitable companies be sure to recommend them. This can in itself be a good marketing or business development activity for future projects for your practice, and will help to engender collaborative working practices.*  *Enter notes here* | Completed on | |  |
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| 6. | Prepare the coordinated design, including coordinated and updated proposals for structural design, services systems, landscape, outline specifications, cost information and  project strategies.  Enter notes here | Completed on | |  |
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| 7. | Draft preliminary specification notes.  Enter notes here | Completed on | |  |
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| 8. | 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 be responsible for the coordination  and integration of their work into the overall design.  Enter notes here | Completed on | |  |
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| 9. | Check the designers’ cooperation with the principal designer with respect to the pre-construction information. As project lead or lead designer, the architect has an obligation (but not a legal duty) to check that every designer pays due regard to the CDM Regulations and avoids foreseeable risks, or takes steps to combat them at source when designing.  The principal designer must take all reasonable steps to ensure that designers comply with their duties.  Enter notes here | Completed on | |  |
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| 10. | Once the client has approved the Stage 3 design, prepare and submit the planning, listed building and conservation area applications as relevant.  *Ensure that all applications are accompanied by relevant documents, including payment by the client of the appropriate fee.*  *Effective monitoring of the planning application can take up considerable resource and this should be accounted for in the fee and cash flow and be explained to the client.*  Enter notes here | Completed on | |  |
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| 11. | If instructed, issue party wall notices as soon as the proposals are sufficiently finalised, on behalf of the client.  *Consultations with users or third parties, and party wall matters, do not form part of the services under the RIBA Domestic Professional Services Contract 2018 and Concise Professional Services Contract 2018, unless identified under ‘Additional Services’.*  Enter notes here | Completed on | |  |
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| 12. | Provide the cost consultant with information for the cost plan and cash flow projection (or  prepare a construction cost estimate if appointed to do so).  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 a regular two-way  exchange of information if designers are to keep within cost targets or limits.  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. They will then advise on the cost implications 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 | |  |
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| 13. | If a BIM protocol is to be followed and you have been 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 levels of detail.  • Assist in the integration of contractors’, subcontractors’ and suppliers’ data into the BIM model.  Enter notes here | Completed on | |  |
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| 14. | Prepare a Stage 3 report which should include:  • The developed design.  • The planning submission drawings, reports and application forms.  • Cost plan.  • Target programme.  • Sustainability assessment.  Enter notes here | Completed on | |  |