

Stage 100 Tools

Version V5.01.01 15 November 2016

Stage 100 tools overview

Stage 100 (Initiation) tools in **iProjects** are:

PF11	Project Briefing & Change Log
PF12	PMP Cover Sheet
PF13	Project Team
PF14	Project Setup & Controls
PF15	Small Project Setup & Controls
PF16	Quality Control Plan
PF17	Project Schedule
PF18	Project Financial Plan
PF19	Project Delivery Budget

iProjects ProForm tools are listed under the Stage where they are first needed. Typically, tools started in one Stage are used in subsequent Stages, often acquiring more information input as the project moves along. Exceptions are Common tools (see UserGuide 4.4.1) and Management tools (see UserGuide 4.4.6).

Features common to most **iProjects** ProForm tools

Typically, ProForm tools have one or more of three types of on-screen help, as indicated below.

- ❖ **Control panel:** Upper right, just outside the form printable area, is a graphic that contains three to seven standard commands, appropriate to the ProForm function. For details on how to use this control panel, refer UserGuide **1.1: Login & Navigation**. “Dupe” means “duplicate this record”.
- ❖ **Margin UserGuides:** On many ProForm templates, there are notes – always in green text, providing advice in using the ProForm. An example is shown right.
- ❖ **On-form User Notes:** Many templates include notes within the printable area of the template, as shown right.

These notes mean that most templates will be self-explanatory, particularly as they are designed to “mirror” the way most practices operate. For inexperienced users, the following details will help explain the use of the Stage templates listed.

[Email](#)
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[Zoom](#)
[New](#)
[Dupe](#)

NOTE: This form is designed to be partially completed digitally (first 3 columns), then printed as a blank distribution template for multiple issues of documents.

USER NOTES:

1. You must have completed Task level pricing on PF18 in order to use this form.
2. Entry earned value data at the Task level, not the Stage level.
3. Obtain “Allowance used to date” values from accounting (hours used x charge rate).
4. All values on this form **EXCLUDE GST or other sales taxes**.

Special features of particular ProForm templates

PF11 Project Briefing & Change Log

The logic embodied in this template is a small but true evolutionary breakthrough in design management, that grew out of consulting assignments we had with Melbourne-based Fender Katsalidis Architects and NZ-based Chow:Hill in 2008-09.

Process review teams in both practices almost simultaneously came to the identical realization that briefing and design variations were not different things, but only different aspects of a single scale of instructions from a client. This means that **all** briefing and scope change information can be handled in a single data structure.

The concept also incorporates an idea developed by one of PSMJ Resources Inc.'s* US clients, where **every** change in a project is recorded and tracked regardless of whether or not it attracts time or cost change.

Both FKA and Chow: Hill have now implemented this concept in Excel; we've automated it as part of the **iProjects** database. One beauty of this tool is that it creates an audit trail of project change, always in front of the client, that completely rewrites the psychological dynamic of change negotiation.

* PSMJ is represented in Australia/NZ by PSMJ Resources Australasia, a subsidiary of Building Technology Pty Ltd. See also the PF91 discussion in UserGuide 4.4.6.

This ProForm template begins with entering the essence of the project brief, its date, and its filepath, for instant retrieval. This information is simultaneously recorded in PF24 **Design Variation Log**.

Thereafter, every project change is recorded on this template. Some of these changes will become Variations; others not (if they can be absorbed within the firm's allowance for change in its quote).

Outline of Brief: Initial client brief

File Path: Doc. Date:

RECORD OF CHANGES TO BRIEF: [New Change Log](#)

Change No. Date	Describe change	Reason	Source/document	Category	Cost of change	Sched. Change delay	VR advice	VR No.
001 10.09.06	Move entry door	Client request	Tele call 06.09.06	Structural	\$120	nil	No	
002 14.09.06	Change stone patio to brick.	Reduce cost	QS discussion 10.09.06	Finishes	\$260	nil	Yes	VR002
This belongs to a Variation Request that has been approved. Please do not modify it.								
003 21.09.06	Change col. row C	Engineer request	Struct Eng email 14.09.06	Structural		nil	No	
004 30.09.06	Change LR window to bay type	Client request	Client letter 20.09.06	Windows	\$240	nil	No	
005 30.09.06	Change side yard setback	Council Order	Council Order No 45634	Site	\$1,200	2 days	Yes	VR003
006 10.10.06	Reduce beam depth C1-C2	Mech Eng request for duct room	Tele call 10.10.06	Structural		nil	No	

[PF18](#) 1. Click on any at left to see th

[PF24](#)

[PF23](#) 2. To assign a existing VR, us

[PF91](#) list under the V

[Add to New Variation](#)

[View PF23](#)

[Add to New Variation](#)

[View PF23](#)

[Add to New Variation](#)

Other key features of this important template are:

- ❖ Reason for the change, and ID of the change source or document (including its filepath if the source document is electronically filed in the firm's database) are recorded and made part of the record. One of the chronic problems with design change is that these reasons and sources are not usually well documented, leaving them open to argument later.

- ❖ The category of the change (eg the discipline it primarily relates to) is recorded and tracked. As this is a sortable field, it is a mouse-click to identify ALL of the changes that go in a particular category. For example, there may be 19 Structural changes in a group of 350 total changes. Clicking the [Category](#) sort button puts all of the structural changes together, so it is easy to see them in context. Clicking back on the [Date](#) field instantly re-sorts them in chronological order.
- ❖ User selects Yes or No in a drop-down pane, depending on whether or not the change is considered to be a Variation. If selection is Yes, the user selects the [Add to New Variation](#) button in the margin, creating a new entry in PF 23 **Change Advice and Variation Request**.
- ❖ Note Change No. 002 in the graphic above. This represents an approved Variation; on approval, the warning notice appears to indicate that the Variation is “closed”, and no additional items can be added.
- ❖ Hotlinks are provided in the margin to toggle back and forth with related templates PF18, PF23, PF24 and PF91.

PF12 PMP Cover Sheet

Although this ProForm template is called a “Cover sheet” for a project management plan, it contains a lot of valuable information about the project, with “at a glance” visibility. Let’s look first at the top half of the page:

Project Management Plan		
for		
Megatowers Training Sample		
located at:		
St Kilda		
Project No.		225
Project phase:		A Proposal
PROJECT OVERVIEW		
Project description:		Service type: <input type="text"/> Constr contr type: <input type="text"/> Services notes: <input style="height: 40px;" type="text"/>
Key team members	Prelim budget (excl. fees)	Key dates
Client <input style="width: 150px;" type="text"/>	Land <input style="width: 50px;" type="text"/> \$	Start <input style="width: 80px;" type="text"/>
Owner <input style="width: 150px;" type="text"/>	Building <input style="width: 50px;" type="text"/> \$	Design Approval <input style="width: 80px;" type="text"/>
Project Mgr <input style="width: 150px;" type="text"/>	Fitout <input style="width: 50px;" type="text"/> \$	Tender <input style="width: 80px;" type="text"/>
Builder <input style="width: 150px;" type="text"/>	Total <input style="width: 50px;" type="text"/> 0	Practical Completion <input style="width: 80px;" type="text"/>

Features of this part of the template:

- ❖ Project name, location, number and phase are auto-entered when the project is created.

- ❖ Project description and Service notes (eg any unusual or special conditions of service) are entered by the Project Manager.
- ❖ Service type and construction contract type (if known) are selected from editable drop-down lists as shown right.
- ❖ General project information: Key team members, overall budget breakdown and key dates are entered by the Project Manager.

The screenshot shows a form with three main sections:

- Service type:** A dropdown menu with options: Conventional, Partial, Alliance, Joint venture, Design/construct, Design only, Novation, Other (describe), and Edit...
- Constr contr type:** A dropdown menu with options: Negotiated, Public tender, Private tender, Alliance, CM at risk, CM, Other, and Edit...
- Services notes:** A text area for entering service notes.

Now let's look at the bottom half of the template:

The screenshot shows two main sections:

- PMP CONTENTS:** A table with columns for document title, Doc. Date, Rev. No., and Rev. Date. It lists various project documents like PF13 Project Team, PF14 Project Setup & Controls, etc., with checkboxes for inclusion. Below the table is a section for 'Additional documents included' with a text area and checkboxes.
- PQP PROCEDURES:** A table with columns for procedure title and checkboxes. It lists various project quality procedures like 'Select appropriate Stage 100 checklists', 'Prepare Project Communications Plan', etc.

At the bottom, there is an **APPROVAL:** section with fields for 'Checked and approved by:', 'Title:', and 'Date:'.

The left columns are a table of contents (as well as being a reminder for the project team) of all documents comprising the PMP. A mark in a check box is sufficient for the more common attachments, and there are two more editable fields to add other standard templates as needed.

Importantly, provision is made to ensure that revision dates and revision numbers for these tools are recorded. Sometimes, a template is revised AFTER a contract is agreed, so the template in use at that time would be the operative one, not the most recent revision.

Four empty fields are included for other contractual documents; these fields can be configured in the firm's overall master file where they typically govern all or most contracts. On the right side, provision is made to enter up to 14 PQP (Project Quality Plan) procedures. Again, these can be set up on the firm's master template and ticked as needed for a particular project.

Finally, at the bottom there is provision for senior level approval of the PMP.

At one level, this template is designed to save time, reduce input errors, and make vital project information readily accessible.

More importantly, at it is designed to improve overall project performance by acting as a prompt to users, by presenting them with the customary options that the firm's leadership considers important for typical projects.

Overall, the results of using this tool will be to simultaneously improve efficiency and project quality, and to reduce the risk of leaving out something critical to project success.

PF13 Project Team

Project Team is a special-purpose function, developed after a lot of trial and error, and unique to the **iProjects** methodology. Its core purpose is to provide a whole-of-project team list that is automatically updated when your contact system is updated. If you are working with the same engineering firm on 27 projects, you update their contact details *once*, and they are instantly updated across the 27 project files.

A secondary advantage of this methodology is to virtually eliminate human data-entry errors, saving the resultant embarrassment of misspelling contacts' names or getting their addresses wrong.

The **Project Team** function has its own tab in **iProjects**, which is described in detail in UserGuide 4.6. Template PF13 is an output list of this process, so we won't duplicate the discussion here.

PF14 Project Setup & Controls

ProForm PF14 is a 3-page template designed to record, as easily as possible, all of the relevant project inputs. Like PF12, this template is designed to save time, reduce input errors, and make vital project information readily accessible. More importantly, at it is designed to improve overall project performance by acting as a prompt to users, by presenting them with the customary options that the firm's leadership considers important for typical projects.

Like PF16, it is easily and fully customizable at the firm level, at the discipline level, at the project type level, *and* at the single project level. The main features are:

- ❖ ID of all Project Disciplines required, with an editable drop-down list of who is responsible for each, as shown at right.
- ❖ ID of all Controlling Authorities, whether the approval is required at the design approval or pre-tender stage, who is to take action (using another drop-down selection list) the date by which each action should be completed, and space for notes.
- ❖ Listing of project setup responsibilities, with an editable drop-down list of the responsible role position, date activity is completed, and a Notes field that expands when you click on it to show a note of any length.

AC	Acoustics Consultant	
AR	Architect	
BM	BMU Consultant	
CC	Communications Cons.	
CE	Civil Engineer	
CM	Construction Manager	
EC	Environmental Cons.	

Client
PM
CM
Arch
Eng
Edit...

Activity	Req'd	Action:	Compl.	Notes
Prep. Expression of Interest				
Evaluate RFP scope/conditions		MD		
Respond to RFI		D		
Visit site		AD		
Interview		PA		
Prepare fee proposal		PE		
Visioning workshop		Edit...		

- ❖ Provision for a summary of project Briefing details, including client's project vision, critical success factors and performance criteria, and a record of any updates to the project Brief.
- ❖ An outline of project communication protocols, with entry under **Frequency**, **Chaired by**, **Minutes by** and **Issued within** made easy by editable drop-down selection lists. This section also provides for noting project confidentiality requirements and any exceptions to the firm's standard Communication Plan (assuming that you've got one!).
- ❖ A conventional matrix for key document distribution.
- ❖ Fields for additional notes with regard to all of the above features.

One "heads up" on this template: FileMaker does not include any commands to force page breaks, and different printers / printer drivers may cause pages to break differently from what was intended. If you experience this problem, give us a call. We are working to get FileMaker to include provision for forced page breaks, but this feature is not currently available.

PF15 Small Project Setup & Controls

This simplified template is used for small projects that do not warrant the creation of a full PMP as explained above – these functions are summarized on one page, which should be self-explanatory except for the simplified Quality Schedule. A user note in this section explains how to use this matrix.

PF16 Quality Control Plan

Is your quality system a big, clunky, cumbersome beast that creates more overheads than it provides benefits? Have you delayed building one because you've heard they are more trouble than they're worth? If so – **iProjects QM** is for **you**. We've put a quarter-century of experience of building ISO 9001 quality systems for design professionals to the ultimate test: to create a viable, usable, compliant system that could be generated *with a single mouse-click*.

Sound impossible? It's not – we've done it. *This is the simplest design project quality system on the planet*, yet is easily and fully customizable at the firm level, at the discipline level, at the project type level, *and* at the single project level.

Critically, the reason we could do this is because the entire **iProjects** system is designed to support ISO-9001:2015 quality compliance, in every applicable template, checklist and function. All of these tools work seamlessly together in the background to support your quality goals, without your needing to worry about them, or the outcomes.

We think that the user notes on the template are adequate to explain its use, so we won't elaborate here – but if any part of it confuses you, please give us a call. 03 9686 3846.

The only thing "missing" is the overall firm Quality System – but it isn't missing, because the system includes a streamlined firm Quality System template that you can download from our website, and *customize to your practice in hours*, not days or weeks or months. Go to <http://buildingtech.com/iprojects/> and under resources click on the **iProject QM Manual** download link.


And to help you get that right the first time, we've also included a special UserGuide: 7.1 **iProjects QM UserGuide**.

PF17 Project Schedule

This ProForm template displays project Stage and Task selections made in DDNA (see UserGuide 4.3) and costs entered in the Project Financial Plan (see below). It is a combination project cost breakdown plan and project schedule.

Selections made in DDNA, and costs assigned in PF18, are ported to the Schedule template, where users enter start/stop dates for each project Task. The software does the rest, populating the schedule with weekly or monthly costs, and all calculations, creating a bar chart style financial project plan – which can be converted to an “S-curve” graph using special graphing tools supplied – which is then used as the basis for Earned Value calculations using PF91 (see UserGuide 4.4.6).

Unless you have totally *amazing* eyesight, you won’t be able to see the detail in the screen shot below – but it should still illustrate the basic idea of how this template works.



This space for your logo / brand

Page 7
AR
PF17

Project Schedule

Project: 225A
Project Name: Megatowers Training Sample

[Data](#) | [Graph](#) |
 Start Date: 01/02/11 | Total Fee: [Reset](#) [Previous](#) [Next](#) | Start Month: **FEB**

[Email](#) [Preview](#) [Print](#) [Save As PDF](#) [Zoom](#) [PF91](#)

Task Description	Finish Date	Total Fee	Start Date	End Date	Unit Cost	FEB 11	MAR 11	APR 11	MAY 11	JUN 11	JUL 11	AUG 11	SEP 11	OCT 11	NOV 11	DEC 11	JAN 12	Totals
100 Initiation																		
100 Initiation complete	26/11/12	\$10,000	10/02/11	10/02/11	\$10,000	\$10,000												\$10,000
200 Schematic Design																		
210 Site analysis #		\$2,500	10/02/11	24/02/11	\$2,500	\$2,500												\$2,500
240 Architectural concept design #		\$30,000	07/02/11	29/03/11	\$15,000	\$15,000	\$15,000											\$30,000
250 Project budget and program #		\$5,000	03/03/11	26/03/11	\$5,000	\$5,000	\$5,000											\$5,000
270 Development application process		\$15,000	07/03/11	22/04/11	\$7,500		\$7,500	\$7,500										\$15,000
300 Design Development																		
310 Research #		\$3,000	02/05/11	24/06/11	\$1,500				\$1,500	\$1,500								\$3,000
320 Design development #		\$35,000	01/05/11	19/07/11	\$11,667				\$11,667	\$11,667	\$11,667							\$35,000
330 ESD / Green Star project		\$25,000	05/05/11	26/07/11	\$8,333				\$8,333	\$8,333	\$8,333							\$25,000
370 Outline specification		\$5,000	05/05/11	07/06/11	\$2,500				\$2,500	\$2,500								\$5,000
400 Coordination																		
400 Coordination complete		\$20,000	03/05/11	03/10/11	\$3,333				\$3,333	\$3,333	\$3,333	\$3,333	\$3,333	\$3,333				\$20,000
500 Documentation																		
520 Contract documentation #		\$75,000	01/08/11	16/12/11	\$15,000							\$15,000	\$15,000	\$15,000	\$15,000	\$15,000		\$75,000
570 Project specification #		\$20,000	01/08/11	30/12/11	\$4,000							\$4,000	\$4,000	\$4,000	\$4,000	\$4,000		\$20,000
600 Procurement																		
600 Procurement complete		\$7,500	01/12/11	30/12/11	\$7,500											\$7,500		\$7,500
700 Delivery																		
710 Set up contract admin procedures #		\$2,500	09/01/12	24/02/12	\$1,250												\$1,250	\$2,500
720 Administer contract #		\$25,000	09/01/12	26/10/12	\$2,500												\$2,500	\$25,000
730 Submissions review #		\$12,500	09/01/12	26/10/12	\$1,250												\$1,250	\$12,500
740 RFIs and Site Instructions #		\$15,000	09/01/12	26/10/12	\$1,500												\$1,500	\$15,000
750 Variations #		\$10,000	09/01/12	26/10/12	\$1,000												\$1,000	\$10,000
760 Progress payments #		\$2,500	09/01/12	26/10/12	\$250												\$250	\$2,500
770 Progress reports #		\$3,500	09/01/12	26/10/12	\$350												\$350	\$3,500
800 Completion																		
800 Completion complete		\$10,000	26/10/12	26/11/12	\$5,000													\$10,000
900 Management																		
900 Management complete		\$25,000	10/02/11	26/11/12	\$1,136	\$1,136	\$1,136	\$1,136	\$1,136	\$1,136	\$1,136	\$1,136	\$1,136	\$1,136	\$1,136	\$1,136	\$1,136	\$25,000
S00 Subconsultants																		
S01 SubTest1		\$100																\$100

Total Project Fee: \$359,100
 Project cumulative costs:

Total monthly cost:
 \$28,636 \$28,636 \$8,636 \$28,470 \$28,470 \$24,470 \$23,470 \$23,470 \$23,470 \$20,136 \$27,636 \$9,236
 \$28,636 \$57,273 \$65,909 \$94,379 \$122,848 \$147,318 \$170,788 \$194,258 \$217,727 \$237,864 \$265,500 \$274,736 \$274,736

YOUR FIRM NAME GOES HERE
 YOUR FIRM ADDRESS GO HERE
 Full width of page is available. See HOME > System Admin

Here's how it works:

- ❖ Scope of Work items are auto-entered when you create the project DDNA – blue items are Stages and black items are Tasks.
- ❖ Total fee amounts (lump sums + allowances) are auto-entered from PF18 to the second column when you price the project.

- ❖ You need to enter the start and stop dates for each Task in columns 3 and 4. The template will round these dates up to the whole month, determine the number of months in which expenditure is anticipated, enter the average amount per month in column 5, and distribute that amount of money across the schedule in each month that expenditure is planned.

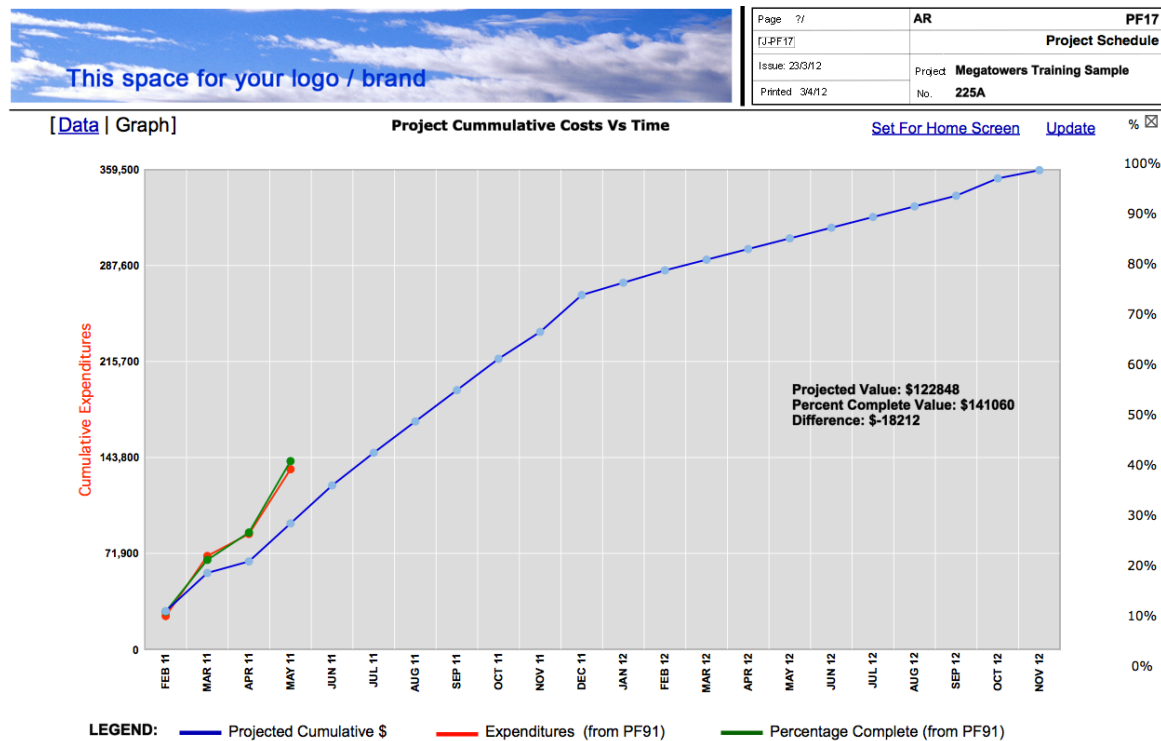
If a task runs from the 15th of June to the 15th of August, the software will read it as 3 months and allocate it accordingly. Purists will argue that this isn't right.

Don't worry about that! The trouble you would get into trying to program it on a daily basis, with different numbers of days in each month, and more working days in some months than others, etc., etc., would be a programmer's worst nightmare. This is one case where "close enough is good enough".

Similarly, don't "get your knickers in a twist" about being unable to program allowances. This is a PLAN, an *approximate* idea of how the project should go. When we get to PF91 (see UserGuide 4.6) we'll show you how the expenditure reporting resolves that question.

- ❖ Finally, the software will total up all these columns, providing a bottom line program of expected expenditure.

Now, if you click on the Graph button below your Firm logo, you will get something like the image below – a graphing representation of the bottom line of the cumulative expenditure amounts.



This is the picture of the way the project is expected to run, providing your bookkeepers and other minders – as well as your client, with some confidence about expectations.

PF18 Project Financial Plan

Creating a simple, easy-to-use Fees Calculator that could handle the diversity of ways that projects are costed turned out to be a challenging task – but we’ve made it work.

Selections made in DDNA (at three levels) appear in this template, where the user assigns any combination of lump sum fees, allowances and exclusions (including mixing them within Stages), and completes tables for expenses and subconsultants to create a fee proposal.

Let's look first at the top half of page 1:

FEE CALCULATOR						
Stages	Title		Pricing options	Lump sum	Allowance	Hourly rate
100	▶ Initiation	Excl	Lump sum	\$10,000.00		
200	▶ Schematic Design	Excl	Combined	\$37,500.00	\$15,000.00	\$150.00
300	▶ Design Development	Excl	Lump sum	\$68,000.00		
400	▶ Coordination	Excl	Lump sum	\$20,000.00		
500	▶ Documentation	Excl	Lump sum	\$95,000.00		
600	▶ Procurement	Excl	Lump sum	\$7,500.00		
700	▶ Delivery	Excl	Combined	\$46,000.00	\$25,000.00	\$125.00
800	▶ Completion	Excl	Lump sum	\$10,000.00		
900	▶ Management	Excl	Lump sum	\$25,000.00		
E00	▶ Expenses	Excl	Allowance	\$900.00	\$400.00	
S00	▶ Subconsultants	Excl		\$100.00		
V00	▶ Variations	Excl		\$500.00		
Internal fees & allowances:			\$360,900.00	Totals:	\$320,500.00	\$40,400.00

Tasks - detail pricing: Schematic						Hourly rate
ID	Title		Pricing options	Lump sum	Allowance	
210	▶ Site analysis #	Excl	Lump sum	\$2,500.00		
240	▶ Architectural concept design #	Excl	Lump sum	\$30,000.00		
250	▶ Project budget and program #	Excl	Lump sum	\$5,000.00		
270	▶ Development application process	Excl	Allowance		\$15,000.00	\$150.00
Totals:				\$37,500.00	\$15,000.00	

When you create a project and go to the Design DNA layout to select the Stages, Tasks and Actions the project requires, these selections are automatically recorded above. In the example we see here, the user has selected Tasks 210, 240, 250 and 270 from Stage 200 Schematic Design (highlighted in green under the Stage list).

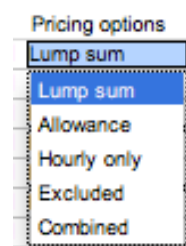
The user has an option to select the first choice in any Task list, which is the same number as the Stage number (eg 200 Initiation complete), which is selected where the firm does not want to break down its price for a Stage.

If the user does want to break down the Stage pricing, he/she has the option of selecting either a Lump sum, Allowance or Hourly only, for each Task selected, using a drop-down pane (shown right).

The user can also select **Excluded**, which indicates that the task is required, but will be an exclusion from the firm's base bid. The last option, **Combined**, is selected only at the Stage level if some of the Tasks are Lump sum and others Allowances.

If the Excluded option is selected, the user clicks the red **Excl** button next to the option field, which auto-enters the excluded item in the List of Exclusions field (see below).

The user enters values for hourly rates for both Allowance and Hourly only selections.



The totals in the Task level pricing are carried up into the Stage level pricing, as shown in the example. Now let's look at the rest of page 1:

[illegible]

Note that in the Task pricing above, we selected 210 Site Analysis (indicated as selected by its green background). The Actions feature below shows us that we marked two Actions in the DDNA, 211 and 212. As the note indicates, these are for reference only, to remind the user of the detail scope of work when pricing.

Below the **Actions** list is a repeating field for **List of Exclusions**, which would display any exclusions the user had marked in the pricing.

On the right is a list of Task allowances, summarizing the allowances set in the pricing model.

Now let's look at p2 of PF 18, shown right. The template provides on-screen User Notes (green text).

The purpose of this matrix is for the lead consultant (hopefully that's you) to collect and organize fee data for the entire project team, providing visibility for the client over the totality of the project design cost, together with any exclusions to Lump Sums or Allowances.

Discipline			Lump Sum	Allowance	Exclusion
ID	Check	Title			
AC	<input checked="" type="checkbox"/>	Acoustics Consultant			<input type="radio"/> Yes <input checked="" type="radio"/> No
AR	<input checked="" type="checkbox"/>	Architect			<input type="radio"/> Yes <input type="radio"/> No
BM	<input checked="" type="checkbox"/>	Building Maintenance Unit			<input type="radio"/> Yes <input type="radio"/> No
CC	<input checked="" type="checkbox"/>	Communications Consultant			<input type="radio"/> Yes <input type="radio"/> No
CE	<input checked="" type="checkbox"/>	Civil Engineer			<input type="radio"/> Yes <input type="radio"/> No
EE	<input checked="" type="checkbox"/>	Electrical Engineer			<input type="radio"/> Yes <input type="radio"/> No
FC	<input checked="" type="checkbox"/>	Food Service Consultant			<input type="radio"/> Yes <input type="radio"/> No
FE	<input checked="" type="checkbox"/>	Facade Engineer			<input type="radio"/> Yes <input type="radio"/> No
FS	<input checked="" type="checkbox"/>	Fire Services Consultant			<input type="radio"/> Yes <input type="radio"/> No
HE	<input checked="" type="checkbox"/>	Hydraulics Engineer			<input type="radio"/> Yes <input type="radio"/> No
ID	<input checked="" type="checkbox"/>	Interior Designer			<input type="radio"/> Yes <input type="radio"/> No
LA	<input checked="" type="checkbox"/>	Landscape Architect			<input type="radio"/> Yes <input type="radio"/> No
LS	<input checked="" type="checkbox"/>	Land Surveyor			<input type="radio"/> Yes <input type="radio"/> No
ME	<input checked="" type="checkbox"/>	Mechanical Engineer			<input type="radio"/> Yes <input type="radio"/> No
OS	<input checked="" type="checkbox"/>	Other Specialists			<input type="radio"/> Yes <input type="radio"/> No
PM	<input checked="" type="checkbox"/>	Project Manager			<input type="radio"/> Yes <input type="radio"/> No
PP	<input checked="" type="checkbox"/>	Project Programme Consultant			<input type="radio"/> Yes <input type="radio"/> No
QS	<input checked="" type="checkbox"/>	Quantity Surveyor			<input type="radio"/> Yes <input type="radio"/> No
Totals					

Firm total fees & allowances:

Project team combined fees & allowances:
\$360,900.00

Refer also to UserGuide 4.4.3: Resource Plan for more information on linking resource planning to cost scheduling.

NOTE: One variant PF18 does *NOT* provide is percent of construction cost fee quoting – for the basic reason that although it is the most widely used method on the planet, it is also the dumbest, and not recommended for (almost) any design firm. If you don't understand why, there will be an article on the **iProjects** website that will explain why, and discuss the one exception where this method can be used successfully. Users who want to use this method can continue to guess at costs or divide the calculated fee by the anticipated construction cost.

PF19 Project Delivery Budget

The last ProForm template in Stage 100 tools is PF19, used to set up an outline budget for the client at the start of the project. Needless to say, use of this tool requires extensive experience and project type-specific knowledge in applying unit prices to construction – so if you haven't got that, best not to use this tool and get yourself into hot water.

With that caveat in mind, let's look at the top half of this template:

PRELIMINARY PROJECT DELIVERY BUDGET					
Land	<input type="text"/>	Building	<input type="text"/>	Fitout	<input type="text"/>
				Total	<input type="text"/>
NOTE: These amounts are from the original Project Brief, and do not include design fees or permitting costs					
DEVELOPED PROJECT DELIVERY BUDGET					
Budget update prepared by: <input type="text"/>		Date: <input type="text"/>		Design stage of update: <input type="text"/>	
LAND VALUE	Item	Area	Units	Rate	Calculated value
	Siteworks	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
	Infrastructure / Utilities	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
	Roadworks	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
	Site Improvements	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
	Permits, use charges & contributions	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
				Subtotals	<input type="text"/>
Cost of land if part of Budget				<input type="text"/>	
				Land Improvement Total	<input type="text"/>
BUILDING VALUE	Item	Area	Units	Rate	Calculated value
	Demolition, underpinning, remedial works	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
	Foundations	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
	Grade A space	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
	Grade B space	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
	Grade C space	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
	Grade D space	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
	Grade E space	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
	Permits, use charges & contributions	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
				Subtotals	<input type="text"/>
Cost of building if part of Budget				<input type="text"/>	
				Construction Total	<input type="text"/>

The PRELIMINARY PROJECT DELIVERY BUDGET is the client's idea of what the project should cost (if they think they know). It's a good idea to keep this opinion where we can refer to it easily.

The DEVELOPED PROJECT DELIVERY BUDGET is your first attempt (your own, or utilizing the help of a quantity surveyor / estimator) to start to bring reality into the project budget. As you can see, the cost planning is all based on unit prices and areas. Note that you have the option of using different values for Lump sum value, compared to Calculated value – reflecting conditions that might raise or lower the notional unit rates.

Now let's look at the rest of the template:

FITOUT VALUE	Item	Area	Units	Rate	Calculated value	Lump sum value
	Joinery / hard fitout					
	Soft fitout					
	Kitchen equipment					
	Other equipment					
	Artwork					
	Permits & use charges					
					Subtotals	
					Fitout Total	

Land cost if part of project	
Building cost if part of project	
Combined consultant fee* (PF18)	\$360,900
Sum of Construction Components	
Construction Contingency <input type="text" value="5%"/>	\$0
Total Project Budget Estimate	\$360,900

* Includes Allowances, but not Exclusions

Consultant fee estimates include:	Yes	Allowances
	No	Exclusions

ALL VALUES ARE ESTIMATES
All values are ex-GST
 See Guide Notes for definition of Grades in space cost allocation and use of Contingency calculator

Note that the Combined consultants' fees are auto-entered from PF18.

The Fitout schedule is obvious; use it if the project budget includes fitout. The "red box" summary at the bottom, when accepted by the client, becomes the framework you **MUST** design to, leaving yourself some room for unforeseen extras.

You can, of course, update and republish this report whenever there are new conditions that affect it: Rising costs, increased areas, latent conditions, and other factors that not infrequently create grief for unsuspecting designers.

As a general guideline, our half-century of toes-to-the-fire experience suggests the wisdom of designing to not more than 95% of budget for new construction or not more than 85% of budget for renovation projects. For particularly "hairy" projects, use lower values. Follow this advice, and you are more likely to be seen as a prescient professional than a dreamy-eyed loser.

The whole point of this tool is to create a framework that controls scope creep and wishful thinking on the part of the client or the designer (or, usually, both).

Thought for the day:

