

## Question 3: Defining the firm's billings

### Application Question

### Explanation

#### Date of Reporting Periods

Please provide your professional service billing information, including billings attributable to consultants, in the questions below. Newly formed firms should use estimated total gross billings for the next 12 months.

(Timeframes represented on application)

**A.** Projects currently covered by a project policy (separate from your practice policy). Please provide the project name, location, construction values, current status, insurance carrier and limits of liability on a separate sheet.

This refers to a project that is separately insured by a project policy covering the design team for its professional services. This policy has a specific limit and deductible for the project.

**B.** Feasibility studies,

**Feasibility studies** are early stage planning studies to determine likelihood of success or challenges of a project.

master plans,

**Master plans** are the long-term outlines of a project. It may include goals to be accomplished.

reports,

**Reports** identify possible options for design, identify deficiencies and provide statements on the project progress.

and opinions

**Opinions** offer written suggestions for improvement of methods of design that may work best on a particular project.

**C.** Abandoned Projects

These are projects that have not been developed through the construction documents phase and are not ongoing. They may not have been completed due to funding or the client may place the plans on hold indefinitely.

**D.** Non-Structural Interior Design

Interior design includes space planning, detailing, finish selection and furniture and fixtures selection (lighting).

**E.** Landscape Architecture

This includes site planning, garden design, environmental restoration, urban planning and park and recreation planning.

<b>F. Land Surveying</b>	These services may include boundary, property, building location, geodetic, photogrammetric, route and topographic surveys, mapping, construction stakeout and/or cartography.
<b>G. International Work</b>	These are services provided in a foreign country.
<b>H. Construction Management or Program Management (as owner's agent or representative)</b>	This refers to providing specific services to coordinate the interface of design and construction, acting as construction advisor for the owner—the design professional is not acting as the general contractor.
<b>I. Facilities or Operations Management</b>	This includes consulting services to government and commercial clients on the operation and maintenance of facilities. The professional could also be providing research or technical advice.
<b>J. All Other Billings</b>	Professional services: design and sub consultant service fees not included in items A. - I.
<b>K. Direct Reimbursable (travel, per diem, etc.) not to include sub-consultants</b>	This includes items that would be directly reimbursed by a client. Examples: travel, mileage, calls, meals, copy expenses, per diem, etc.
<b>L. Total Gross Billings (sum of A through K = L)</b>	All above items totaled.
<b>M. Approximate Construction Values</b>	Dollar value of completed construction of all projects.