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PROJECT PLANNING

Information to be provided by the client to the design professional, as stated in some standard contract forms, usually calls for the client to provide 'full information,' defined to include a program, schedule, budget, survey, geotechnical and other necessary information. The accuracy of that information should be at the client's risk. In those same standard forms, the design professional has a corresponding duty to respond to that initial information and let the client know of any potential conflicts in the information or the need for additional information or design professional services.

Professional's evaluation of project

Design professionals undertake to carry out their responsibilities with a reasonable degree of care and professional ability. The client is buying both skill and judgment. Therefore, the design professional should never take on projects where the possibility of success is in doubt from the beginning. The design professional should be certain that the project is within the firm's technical expertise and competence, and should only promote expertise in those disciplines in which staff members have both theoretical knowledge and practical experience.

Project summary report

Some design professionals summarize all the relevant project documentation in a 'Project Summary Report,' and use it to document planning assumptions and decisions, facilitate communications and provide a baseline for project control.

The report could include:

- ✓ Project program
- ✓ Client's schedule
- ✓ Design professional's project milestone schedule and subsequent status
- ✓ Client's budget of costs
- ✓ Design professional's preliminary estimate of cost
- ✓ Alternative solutions to be evaluated and subsequent status
- ✓ Client-furnished site data, information and subsequent status
- ✓ Codes and regulations applicable to the project
- ✓ Permit requirements of the project

Consultants

When 'staffing up' the project, the design professional should consider the availability of appropriate consultants. When consultants are being considered for a project, the design professional should consider, in addition to their experience and availability, their ability to cover their own expenses and payrolls during the project. A troubled consultant can threaten the work of the entire project's design team. How important is project evaluation? Many firms generate 100 percent of their profits from fewer than 30 percent of their projects.

Interprofessional agreements

The agreements between the prime design professional and each of the subconsultants should describe in detail

the separate duties and responsibilities of each. 'Grey areas' must be eliminated, in writing, so there is no overlapping of responsibilities and no gaps in responsibility. Because almost all design and construction projects involve multiple contracts, those contracts should be similarly structured to avoid conflicts and ambiguities.

The following points of coordination deserve attention:

- ✓ Quality program requirements and responsibilities
- ✓ Design criteria and standards, drawing or CADD file format
- ✓ Schedule requirements
- ✓ Budget requirements and any construction cost limitations
- ✓ Terms and timing of payment
- ✓ Use and ownership of documents, and the copyright for the documents
- ✓ Terms and provisions for termination
- ✓ Dispute resolution provisions
- ✓ Insurance requirements, including certificates of insurance
- ✓ Limitation of liability provisions

Opinions of probable cost

Clients naturally want to know how much a project is going to cost. Unfortunately, this is not a figure that can be provided with any great confidence until fairly late in the design process. For that reason, and because specific numbers can expose the design professional to a claim if their estimates are wrong, the design professional should only commit to an opinion of probable cost. In the paperwork that goes to the client, the design professional should make clear the variables that could change the figures, including limitations of the information available and lack of approval of authorities having jurisdiction. The design professional could offer to retain a professional cost consultant, and more importantly, state that the numbers provided are an opinion of probable cost and not an estimate. When everybody is in charge, nobody is in charge.