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Stage 7

In Use

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## RIBA Plan of Work 2013 Stage 7

### In use

<table>
<thead>
<tr>
<th>Task Bar</th>
<th>Tasks</th>
</tr>
</thead>
<tbody>
<tr>
<td>Core Objectives</td>
<td>Undertake In Use services in accordance with Schedule of Services.</td>
</tr>
<tr>
<td>Procurement</td>
<td>There are no specific activities in the RIBA Plan of Work 2013.</td>
</tr>
<tr>
<td>Programme</td>
<td>There are no specific activities in the RIBA Plan of Work 2013.</td>
</tr>
<tr>
<td>(Town) Planning</td>
<td>There are no specific activities in the RIBA Plan of Work 2013.</td>
</tr>
<tr>
<td>Suggested Key Support Tasks</td>
<td>Conclude activities listed in Handover Strategy including Post-occupancy Evaluation, review of Project Performance, Project Outcomes and Research and Development aspects. Updating of Project Information, as required, in response to ongoing client Feedback until the end of the building’s life.</td>
</tr>
</tbody>
</table>
| Sustainability Checkpoints | • Has observation of the building operation in use and assistance with fine tuning and guidance for occupants been undertaken?  
• Has the energy/carbon performance been declared? |
| Information Exchanges (at stage completion) | ‘As-constructed’ Information updated in response to ongoing client Feedback and maintenance or operational developments. |
| UK Government Information Exchanges | As required. |
The stage involves:

- Activities associated with the maintenance of a building throughout its life, leading to potential alteration or refurbishment, bringing the Plan of Work 2013 cycle back to Stage 0.
- The opportunity to maintain a relationship with the client (or building user if these are different people) with a view to studying the building’s performance for use on future projects and recognising the potential for further work or referrals from that client.

For most small projects it is unlikely that further fees will be attainable during Stage 7. However, all buildings need maintenance and this work could attract consultancy fees. Many buildings are altered and/or extended during their life and this will certainly attract consultancy fees. Stage 7 can be considered the period – during the life of the building – where a relationship with the client can be maintained. Remember that between one-third and three-fifths of commissions result from repeat business (depending on practice size). Add to this the potential for referrals by recommendation and it can represent a critical percentage of a practice’s income.

Stage 7 is a new stage for the Plan of Work 2013 and covers activities undertaken after completion of work carried out under the Building Contract.

(Note: the Defects Liability Period and Post-occupancy Evaluation activities are both part of Stage 6).

On average, practices spend 2% of their turnover on marketing. However, smaller practices fall below the benchmark: Micro: 1.3%; Small: 1.4%; Small to medium: 1.4%.
**Project activities**

**Information required**

<p>| | |</p>
<table>
<thead>
<tr>
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</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>'As-constructed' Information.</td>
</tr>
<tr>
<td>2.</td>
<td>BIM model (if one is available).</td>
</tr>
<tr>
<td>3.</td>
<td>Programme of maintenance.</td>
</tr>
<tr>
<td>4.</td>
<td>Terms of appointment for services to be undertaken.</td>
</tr>
</tbody>
</table>

**Stage activities**

<p>| | |</p>
<table>
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<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Periodically make contact with the building occupier and/or owner (if a different person or company) to ascertain any matters that need attention.</td>
</tr>
<tr>
<td>2.</td>
<td>Where possible agree fees for any work required.</td>
</tr>
<tr>
<td>3.</td>
<td>Where it is felt appropriate and of benefit, keep a record of the building’s performance, both in environmental terms and with regard to durability of materials and the performance of construction detailing.</td>
</tr>
</tbody>
</table>

**Making time for your clients**

You will need to set time aside for these activities, but once they are standardised (perhaps within your QA system) they need not take up much time and will definitely add value. Set up reminders in your electronic diary and keep a note on your CRM spreadsheet; see advice on setting up a CRM programme in Stage 7: Client relationship management (CRM).
Information exchange

1. ‘As-constructed’ information updated in response to ongoing client Feedback and maintenance or operational developments.

2. A record of client comments and Feedback, both objective and subjective.

On average, practices win 57% of the projects that they chase (53% for micro practices and 65% for small practices), including repeat business and projects won as a result of a direct approach with no competitive process.

RIBA Business Benchmarking Survey 2013/14
Post-occupancy Evaluation (POE) on small projects

As noted above, many small projects will not have provision for these sorts of post-occupancy activities but with rising energy prices clients are increasingly interested in improving their building’s environmental performance, and being able to offer these services will be helpful in these circumstances. It is a matter of record that environmental performance often falls short of the designed targets (refer to www.carbonbuzz.org). Consider proposing a fee for such activities that is a percentage of the energy saving generated through your input.

Sustainability Checkpoint 7

Sustainability aims
To provide any services relevant to the operation or use of the building as agreed.

Key actions

1. Observe the building operation In Use and assist with fine tuning and guidance for occupants.

2. Check that the energy/carbon performance has been declared.

3. Review controls and performance in each season and update manuals and records to reflect any changes.

4. Feed lessons learned from the Post-occupancy Evaluation back to the client and project team.
Project issues
Dear [client's name/s],

PROJECT NAME

It has been 6 months/12 months* since we last spoke/corresponded* so this is just a quick note to check if you have any questions we might be able to answer on the operation or maintenance of the building, or if you have any comments – objective or subjective – on how you are finding living in/working in/using* it.

We use all the feedback we get from our clients on previous projects to guide our work on future projects, with the aim of continuously improving our work and delivering value to our clients, so any thoughts you can share will be very much appreciated.

And of course if you have any other projects under consideration, please do bear us in mind!

I’m pleased to say we have recently [add note on recent project completions, planning wins, awards, new members of staff, etc].

I look forward to hearing from you.

Kind regards,

[Your name]

* Delete as applicable
Using BIM models for FM

Practices that can provide BIM capability might consider marketing this for the purposes of facilities management (FM). This niche activity need not be on projects the practice has delivered, and the sort of clients it would be appropriate for are not likely to be those the practice works for. However, for those seeking to increase the size of project they can work on, such work will give exposure to larger clients and provide an ‘in’ to get on to their suppliers lists.

So who are these clients?
The key people to approach will be contractors. Look up the local offices of the larger ones that are likely to be undertaking Private Finance Initiative (PFI)-type projects. Other potential clients are housing associations and other residential landlords for new-build properties or end-user owner/occupiers.

What does the work involve?
You will need to have the capability to import the ‘As Constructed’ drawings from the project, maintain a secure copy of them, either on your office server (suitably backed up) or in the cloud. The as-built model will need to be adapted and refined and integrated with the FM software in order to manage the building – currently this is driven through scheduled inputs that are taken from the model, but around 75% of the information is not actually required. An FM model is therefore a ‘skinny’ as-built model, and a good FM model will need to be trimmed of all unnecessary information – a Stage 6/7 task.

You will need to agree a programme of workflow or alternatively an hourly rate for work to be undertaken to update the model. You will also potentially be responsible for alerting the facilities manager when assets need to be maintained or replaced.

It should be noted that most FM issues deal with M&E services, and any changes would need to be fed back into the model. It may be preferable to have a specialist do this. If an FM team is producing information to be updated within the model, then it might need a model manager – someone who can ensure all the information is updated correctly – in which case the lead designer is best placed to offer this service on an hourly basis.

Post-occupancy Feedback can be incorporated into the model – patterns of use and seasonal variations, elements and components that work well can be supplied as a packaged element for the next job. For further advice go to www.bimtaskgroup.org/bim4fm-group.
This project was for Living Architecture, a trust set up to build holiday houses with the specific intention of making extraordinary architecture that can then be experienced by the public. Norwegian firm Jarmund Vigsnæs Arkitekter was selected in 2008 through a short competition process, and Mole Architects are the UK firm partnering with the international architects employed by Living Architecture. Both architects were separately employed by the client through all stages of the contract, with the architects working in partnership to deliver the project. Fee structures reflected the changing roles of the two architects, with Jarmund Vigsnæs starting with a higher proportion of the fee during design stages, reducing as Mole ran the job on site; during Stage 4 the fee split was equal.

Situated on the Suffolk coast in an area of outstanding natural beauty, the 220m² holiday house replaced a smaller existing building on the site. Nearby houses are predominantly single storey, with little consistency of style.
Planning issues that had to be overcome were primarily the need to design for flood resilience, and the scale of the building within its context. The architects’ desire to make a house that expressed the contrasting quality of the open ground floor and attic bedrooms above was in part a response to the jumbled roofscape of nearby houses. Consultation and extensive negotiations with the conservation and planning officers proved vital and, alongside a robust design and access statement, ensured planning success.

The structure of the house is a hybrid. The lower floor is a tanked in situ concrete base, with a structural concrete core and a concrete first floor partially cantilevered from the core. The upper floor is manufactured from cross-laminated timber. The timber frame was manufactured by a specialist contractor who completed a 3D model which was shared with the design team prior to fabrication.
Practice issues
Client relationship management (CRM)

Keeping in touch with your old clients and developing new ones is critical to business development and maintaining a pipeline of projects. This is generally termed ‘client relationship management’ (CRM) and is best managed with a simple spreadsheet so that you can reorder the information, for example by company name, or contact name or by activity, sector or ‘next contact due’. This may help with sending out targeted marketing information.

Under ‘Activity’ note whether a client, consultant (eg engineer, planning consultant, interior designer, etc) or other. Always use the same terminology so that you can sort the information into categories.

Under ‘Building sectors’ note the principal sectors they are involved in (eg residential, offices, retail, etc).

The ‘Notes on last meeting/conversation’ should contain enough detail for you to recall the contact’s key business interests (eg building sectors), the key issues discussed and any actions arising, eg ‘send details of previous projects’; ‘put in touch with another contact’; ‘undertake speculative design’; ‘given go-ahead for project’; etc.

Make a note of when the next contact is due and put a reminder in your electronic diary (eg MS Outlook or Google Calendar).

This spreadsheet is a vital tool in your business development activities and must be kept up to date and monitored regularly. And make sure it is properly backed up by your IT system!

The spreadsheet should have the following headings:

<table>
<thead>
<tr>
<th>Company</th>
<th>Contact name</th>
<th>Job title</th>
<th>Activity</th>
<th>Building sectors</th>
<th>Address</th>
<th>Email</th>
<th>Telephone</th>
<th>Notes on last meeting/conversation</th>
<th>Next contact due</th>
</tr>
</thead>
</table>

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Stage summary

It is not usual – traditionally - for the design team to continue involvement with a building after its completion (that is after the Defects Liability Period) but Stage 7 provides a framework for this to happen. For small projects it is likely to be just keeping in touch (and therefore with no fee associated), with a view to picking up the next job, and it is more likely that only larger projects will provide a role for maintenance where a fee can be agreed.

However, information gained from Feedback can and should be fed into Stage 0 activities for future projects which could include further construction work associated with the same building.