

The Builder's Companion

SCHEDULES AND CHARTS WORKBOOK

Kickstart Your Project

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ABC
A Builders Companion

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The 1-Page Build Plan

The 1-Page Build Plan indicates the various stages of the project and how you may break down the items in the 'big picture'. These go into much more detail but are only for guidance. The purpose of the exercise is that you name your own headings and identify key points. This system will chart your course through the project. How much micro detail you go into is down to personal preference. This assists you to recognize if you need further information on what is 'coming over the horizon'. 'The 1-Page Build Plan' should act as a prompter of what you need to address.

The idea is to break down tasks in a logical way and have an overall visual diagram of what needs to be done. When items are achieved, they can be highlighted or deleted, to be replaced by upcoming issues.

1-Page Building Plan

Find Plot	Team
Contacts	Set Up Files
Identify Area	Set Up File Sharing System
6-Degrees of Separation	Family Support
Auctions	Magazine Articles
Web Searches	Set Up Basic Accounts

Money	Costs
Calculate Wealth	How Much to Purchase Suitable Finished Home
Identify Leverage	Consider 'Unit Costs'

1-Page Building Plan

Find Plot	Team

Money	Costs

The Players Chart

Your build journey will be populated by players representing many different organizations and bodies that you will engage, consult, have certify, regulate and facilitate your building work; all of whom you must pay. They are made up of 12 sets of players, all playing for their own teams. As organizations they cover a wide range of services, nonetheless they all impact on your build and all must be managed.

It's time to define how you will deliver the project from now until completion.

The question is : who are *'The Players'* and *how much are they involved?*

Fill the boxes with actual names where possible. By naming individuals, you can focus on what needs to be done and who will do it!

The Players

Owner/Self-Builder	Key Professionals	Secondary Professionals
You	Architect	Setting Out Engineer
Your Named Team	Structural Engineer	Geotechnical Engineer
	Planning Consultant	Party Wall Surveyor
	PQS (Cost Engineer)	Services/Heating Consultants
		Plus others as required
Suppliers	Contractors	Building Inspection
Windows & Doors	Carpenters	Government /Municipal Authority
Kitchen	Plumbers	Statutory Bodies
Bricks	Bricklayers	Utility Providers
Flooring	Concreter	Regulations & Codes
Structural Steel	Roofing	
Concrete	Plus all trades	
Plus all materials		
Infrastructure and Utility Companies	Government Bodies	Insurance Companies
Electricity	Central	Building Insurance
Gas	Local / State	Public Liability
Telephone/Cable	Planners	Materials & Theft
Water	Tax Office	Building Warranty Insurer
Sewerage		Tools/Equipment
Professional Trade Associations	Finance	Legal & Regulatory Consultants
Architects Registration Board	Bank/Mortgage Company	Lawyers/Solicitors
Engineers Professional Association	Family	Accountants
Builders Associations etc.	Brokers	

The Players

Owner/Self-Builder	Key Professionals	Secondary Professionals
<hr/> <hr/> <hr/> <hr/> <hr/>		
Suppliers	Contractors	Building Inspection
<hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/>		
Infrastructure and Utility Companies	Government Bodies	Insurance Companies
<hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/>		
Professional Trade Associations	Finance	Legal & Regulatory Consultants
<hr/> <hr/> <hr/>		

Project Milestones Chart

It can be useful to draw up a schedule of intended milestones. This confirms you considered and included the professional team and contractors agreed milestone dates for the project to be delivered.

Consider your professional team and question how long they want to reach a given or fixed achievement. List these dates as your set target dates. Part of the process is also holding yourself to account. So, list the dates that you instruct your professional advisors. How well will you fare?

What can be eye-opening is an 'achievement' column, which records the number of days of delay. No column is included for the number of days that you are in advance, as this just doesn't happen, but the chart can be adjusted to suit your individual circumstances.

Project Milestones Chart

Milestone	Planned	Actual	Item Delay
Appoint Planner	01-Feb	05-Feb	5 Days
Appoint Designer	01-Feb	05-Feb	5 Days
Appoint Engineer	05-Feb	12-Feb	8 Days
Appoint Land Survey	10-Feb	01-Mar	20 Days
Appoint Hydrological Engineer	10-Feb	07-Mar	26 Days
Appoint CE (PQS)	10-Feb	17-Mar	36 Days
Professional Team Appointed	10-Feb	17-Mar	35 Days
Land Survey	15-Feb	01-Apr	60 days
Hydrology Report	15-Feb	12-Apr	57 Days
Planning Reports Prepared	15-Mar	01-May	62 Days
Concept Design for Discussion - Stage 1	01-Apr	15-Jun	76 Days
Pre-Application Planning	08-May	01-Aug	86 Days
Prepare Scheme	01-Jun	01-Sep	93 Days
Freeze Scheme - Stage 2	10-Jun	01-Oct	114 Days
Submit Planning Application	12-Jun	03-Oct	114 Days
Planning Decision	15-Aug	15-Jan	154 Days
	Planned	196 Days	
	Delay	154 Days	
	Total	349 Days	

- Chart graphically emphasises how delays cascade.
- First date & end date included in calculation.
- No column provided for time ahead of schedule.

Project Milestones Chart

Milestone	Planned	Actual	Item Delay
Planned Delay Total		Days Days Days	<ul style="list-style-type: none"> • Chart graphically emphasises how delays cascade. • First date & end date included in calculation. • No column provided for time ahead of schedule.

What Does It Do?

A question to ask yourself when you are looking at each area and room is: what does this room do? This may seem an obvious question for, say, a bedroom, but is it?

Who will occupy the room and what activities will take place, remembering young children have different requirements to teenagers? Will the room be used for school study or music playing?

The question can be phrased as *'what does it do and what else does it do?'*

It's surprising how many spaces are multi-functional. To design this at the earliest stage is beneficial for the design and also dramatically improves the outcome of the finished product. This process goes back and forth until you are clued up on who will use each area and the whole package seems to check all the boxes.

What Does It Do Chart

Area Name	What does it do?	What else does it do?
Front Door External	Somewhere to stand to open the front door.	An area for visitors to enter your home. First impression are important.
Front Door Internal	Door mat and side table space.	Closet.
Hallway	Access to stairs and living room.	Access to ground floor WC.
Stairs	An accessway between floor levels.	A feature of the hallway.
Ground Floor WC	WC on living room level.	Wet umbrella stand.
Living Areas	Seating area.	TV and entertainment.
Family Areas	Seating adjacent to kitchen.	Children homework/play.
Kitchen Areas	Cook meals.	Dine at breakfast bar.
Dining Areas	A place for family meals.	An entertainment area of the home.
Rear External Areas	Conservatory.	Plants & coffee area.
Future Elevator Space	Provides a clear position to fit a future domestic elevator.	Allows you the flexibility to remain in your home if you are unable to climb the stairs.
Laundry	Position of washing machine and dryer.	Ironing board storage & linen cupboard.
Bathrooms	Facilities for children & guests.	Add bath for children with separate shower.
En-Suite Bathrooms	A place to use WC and washing facilities.	A place of privacy.
Main Bedroom	Our bathroom.	Add extra wash hand basin.
Bedroom 2	A place for guests to sleep.	A place to offer to guests as part of their stay. Care may be taken with views/light/facilities etc.
Bedroom 3	A place for a child to sleep.	Homework/instrument practice/toy storage/how old will the child be in two years?

What Does It Do Chart

Area Name	What does it do?	What else does it do?

Build Cost Projection Budget

What is the base information you need to assess if the project is viable? The below list assumes you have a lot in mind to which you can attribute projected costs. Without a budget you are in **danger of spending money you do not have.**

Item	Budget	Total
Property Cost		
Legal Fees		
Purchasers' Costs		
Purchasers' Taxes		
Sales Cost of Previous Property		
	0.00	0.00
Designer		
Engineer		
Planning Consultant		
Secondary Consultants		
Building Insurance		
Temporary Power		
Services		
Permits		
Home Warranty Insurance		
Building Inspection		
Other local Charges		
Lender's Fee		
Lender's Interest Sum		
Lender's Inspection Fee		
Overheads you must carry		
	0.00	0.00
Demolition		
Enabling Works		
Build (per ft ² /m ²)		
Garages (per ft ² /m ²)		
Overheads		
Rubbish/Waste Removal		
Site Energy Costs		
Landscaping		
BBQ Area (special cost)		
	0.00	0.00
<i>• The list gives an indication of possible items.</i>		
Total	0.00	0.00

Schedule of Work

For a single owner-built home, the items need to be co-ordinated but can be kept quite simple. As long as you monitor and regularly update this document, it will serve you well.

First, list in sequence the construction operations. This is done to recognize the completion point. This can be detailed or broad brush, depending on your enthusiasm and skill level. The greater the detail included, the more accurate the emerging picture will be.

Try not to be too precious about the exact sequence at this stage. This will change as the information is sifted and compiled.

[Click on the below chart to open an editable 'Schedule of Work' in Microsoft Excel.](#)

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U
1	List of Tasks	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20
2	Pre-Commencement	3-May	10-May	17-May	24-May	31-May	7-Jun	14-Jun	21-Jun	28-Jun	5-Jul	12-Jul	19-Jul	26-Jul	2-Aug	9-Aug	16-Aug	23-Aug	30-Aug	6-Sep	13-Sep
3	Appoint Planner																				
4	Appoint Designer																				
5	Appoint Engineer																				
6	Instruct Land Survey				SURVEY																
7	Instruct Hydrological Engineer				REPORT																
8	Appoint PQS						BUDGET														
9	Professional Team Appointed																				
10	Concept Design for Discussion																				
11	Planning Reports Complete																				
12	Pre-Application Planning Meeting																				
13	Prepare Scheme																				
14	Freeze Scheme																				
15	Submit Planning Application																				
16	Discussion / Further Input																				
17	Planning Decision																				DECISION
18	Notes:																				
19	No Allowances for Public Holidays																				
20	What timescales can be tightened up and reduced?																				

Schedule of Work

List of Tasks	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	
	3-May	10-May	17-May	24-May	31-May	7-Jun	14-Jun	21-Jun	28-Jun	5-Jul	12-Jul	19-Jul	26-Jul	2-Aug	9-Aug	16-Aug	23-Aug	30-Aug	6-Sep	13-Sep	
Pre-Commencement																					
Appoint Planner																					
Appoint Designer																					
Appoint Engineer																					
Instruct Land Survey				SURVEY																	
Instruct Hydrological Engineer				REPORT																	
Appoint PQS							BUDGET														
Professional Team Appointed																					
Concept Design for Discussion																					
Planning Reports Complete																					
Pre-Application Planning Meeting																					
Prepare Scheme																					
Freeze Scheme																					
Submit Planning Application																					
Discussion / Further Input																					
Planning Decision																					DECISION
<p>Notes:</p> <p>No Allowances for Public Holidays</p> <p>What timescales can be tightened up and reduced?</p>																					

Schedule of Work

List of Tasks	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20

Notes:

Notes area containing a large empty box for writing additional information.

Good Practice Check Box

An accident is by definition an unplanned occurrence, and it is your responsibility to reduce the opportunities of unplanned occurrences. Whenever you are walking around the site, keep your eyes open and be aware of safety issues. However, you do not need to plan safety checks; they are part of the ongoing daily routine.

**The Good Practice Check Box may prompt something - but remember ABC
(Always Be Careful)**

Good Practice Check Box

Item	Good Practice	Tick Yes
ABC	Always be careful	<input type="checkbox"/>
Information	Written SWMS	<input type="checkbox"/>
First Aid	Kit available at all times	<input type="checkbox"/>
Insurance	Display. Obtain sub contractors' insurance	<input type="checkbox"/>
Site Security	Site hoarding to secure boundaries	<input type="checkbox"/>
PPE	High viz & hard hats	<input type="checkbox"/>
Safety Information	Signage at entrance	<input type="checkbox"/>
Water	Clean running water. Heated?	<input type="checkbox"/>
Toilet Facilities	Portable washroom	<input type="checkbox"/>
Lighting	To all work areas	<input type="checkbox"/>
Power	Cables safely run to all areas	<input type="checkbox"/>
Work at Height	Safety rails	<input type="checkbox"/>
Ladders	Labelled for weight etc.	<input type="checkbox"/>
Hazards	Stairs clear and clean to prevent trips	<input type="checkbox"/>
Scaffold	Regular checks - alterations by authorised persons only	<input type="checkbox"/>
Access Tower	Safety first	<input type="checkbox"/>
Mechanical Equipment	Authorised operators only	<input type="checkbox"/>
Tools & Equipment	Battery operated	<input type="checkbox"/>
Chemicals & Gas	Stored securely	<input type="checkbox"/>
Falling Objects	Overhead protection	<input type="checkbox"/>
Risk Avoidance	Always	<input type="checkbox"/>

Defects List

'Punch' or 'Snag' List is the informal name for the list of defective or incomplete items noted after works were offered as complete. The list states items, that are still to be completed or require improvement. You are asking the contractor to complete defective or unfinished items.

Discuss completion with each trade contractor and set them to work completing all the points listed. Ask them to let you know when their work is complete.

Then you re-check and if you are not happy, discuss this further and reissue an amended list. At the end you are crystallizing what needs to be done and if there are problems then you want to be able to deal with them.

Location	Contractor	Signed off
Ground Floor		<input type="checkbox"/>
Level Points Above Worktop	AKA Electrical	<input type="checkbox"/>
Certificates - All	AKA Electrical	<input type="checkbox"/>
Labels to CCU	AKA Electrical	<input type="checkbox"/>
Confirm all Appliances Operational and Fixed	AKA Electrical	<input type="checkbox"/>
Install Shelf Under Kitchen Sink	Carpenter	<input type="checkbox"/>
Repair Melamine to Edge of Microwave	Carpenter	<input type="checkbox"/>
Clean Stains from Front Paved Area	Jim	<input type="checkbox"/>
Clear Materials from Rear Garden	Jim	<input type="checkbox"/>
Issue Gas Certification	Fast Gas	<input type="checkbox"/>

*Highlight the items applicable to a specific contractor.
Name a person /company/ trade.
Ask Contractor to return sheet indicating completion.*

Defect List

Location	Contractor	Signed off
		<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>

*Highlight the items applicable to a specific contractor.
Name a person /company/ trade.
Ask Contractor to return sheet indicating completion.*

Finish Schedule

To assist your contractors, a schedule detailing the finishes for each area can be very useful. This will become the basis for a pricing document as it will clearly explain what finish is wanted where. The sheet below is scheduling tiles but it can easily be adapted to cover any other material finish.

	Floor	m ²	Wall	m ²	Comments
B1 Ensuite	MAXMT 1000 Belgium Stone Bruno Lapparto 600x300	7m ²	MAXFL1180 BELGIUM STONE ICE NATURAL Lapparto 600x300	10m ²	The tap is wall fixed - cut hole in tile.
B2 Ensuite	MAXFL1037 Strato Nero Natural 600x300	6m ²	MAXFL1028 Strato light Grey Natural 600x300	8m ²	<p>The Strato Nero Natural is not showing on the webpage as 600x300. If you can not get it, please get Stratos Nero in 600x300. Please get Lapparto finish if available.</p> <p>The Strato Light Grey Natural is not showing on the webpage as 600x300. If you can not get it, please get Stratos Light Grey in 600x300. Please get Lapparto finish if available.</p>

Finish Schedule

Floor	m ²	Wall	m ²	Comments

Do You Feel 'Companionable'

I hope you enjoyed The Builder's Companion Books. Can you please take a moment to share your review on the site you purchased the books and on social media (anywhere between two words and as many as you like) would be very helpful to me and benefit other owner-builder's to find the book.

Do you know of someone else with an interest in home building?

Have you thought of sending them a copy of the book or e-book?

I would be pleased if we can get the book out there.

Just drop me a line at philip@abuilderscompanion.com letting me know what you think and I will personally respond.

**Everyone needs a building
buddy or ...
The Builder's Companion.**