WORKPLACE PROJECT TOOL

Office fit-out brief and readiness checklist

Use this workbook to issue the same verified requirements to each candidate team. It separates business needs, workplace capacity, property facts, technical interfaces, delivery responsibilities, continuity constraints and appointment evidence. It is not a design, approval, safety or contract document.

Project basis

Project / office		**Site address / floor**	
Brief revision / date		**Target operational date**	
Project sponsor		**Day-to-day owner**	
Budget authority		**Design / change authority**	

Five brief controls

Control	What the brief must establish	Evidence before commitment
Business outcome	Capacity, work mode, client experience, privacy, lease event, consolidation or another measurable need.	Approved outcome and success measure
Continuity	Occupied work, temporary move, floor-by-floor handover, shutdowns, blackout dates and critical functions.	Approved operating and move basis
Property	Lease or owner conditions, reinstatement, building procedures, current plans and survey status.	Current property and building inputs
Decision route	Sponsor, project owner, budget authority, design authority and consolidated stakeholder input.	Named authority and response times
Commercial basis	Included services, direct purchases, taxes, allowances, risk, payment and change procedure.	Comparable issue to every bidder

SHEET 1

People, activities and workplace schedule

Describe users and activities before naming rooms. Record the current basis, the planning requirement and the evidence source so headcount, attendance and growth assumptions remain visible.

ID	Team / activity	People / frequency	Work setting / capacity	Privacy / acoustic	Technology / equipment	Adjacency / access	Source / status
A-01							
A-02							
A-03							
A-04							
A-05							
A-06							
A-07							
A-08							

SHEET 1B

Support and future-use requirements

Complete the supporting needs that are often missed by a desk-and-room count. State who approved each requirement and record any qualification still awaiting verification.

Topic	Requirement prompt	Approved basis / qualification
Visitor route	Arrival, waiting, host contact, security separation, accessibility and confidential movement.	
Staff support	Storage, lockers, pantry, wellness, print, waste, records, supplies and personal belongings.	
Retained assets	Furniture, equipment, technology or materials to retain, relocate, refurbish, store or dispose.	
Growth / flexibility	Planning horizon, expansion basis, reconfiguration need and constraints on future change.	

SHEET 2

Property, survey and technical interface register

Do not present unverified existing information as a design fact. Record who supplies, checks and accepts each input, plus the decision or release that depends on it.

Input	Required fact / scope	Source / revision	Responsible party	Dependent release
Lease / reinstatement	Alteration, reinstatement, insurance and consent conditions			
Building procedures	Access, permits, loading, lifts, waste, hours, shutdowns and deposits			
Measured survey	Dimensions, levels, partitions, ceiling zones and visible condition			
Electrical / data	Capacity, distribution, containment, resilience and migration			
Cooling / ventilation	Existing capacity, zoning, controls, outside air and interfaces			
Fire / life safety	Detection, alarm, suppression, egress and specialist review			
Plumbing / drainage	Pantry, toilets, wet services, isolation and discharge route			
Security / audiovisual	Access control, cameras, rooms, displays, conferencing and testing			

SHEET 2B

Review and approval route

List every landlord, building, consultant, specialist or authority review that can control design, procurement, access, system shutdown or occupation. Confirm the applicable route with the responsible party.

ID	Review / consent	Submission evidence	Preparer	Reviewer / authority	Need-by / status
R-01					
R-02					
R-03					
R-04					
R-05					

SHEET 3

Scope, deliverable and responsibility schedule

A broad label such as turnkey does not allocate responsibility. Record the named party, deliverable, review route, site role and explicit exclusion for every package that can affect cost, time or operational readiness.

Package / service	Lead party	Required output	Review / acceptance	Site attendance	Exclusion / interface
Workplace brief / test fit					
Interior design information					
Services / specialist coordination					
Cost plan / BOQ / tender					
Furniture / equipment					
IT / data / audiovisual					
Building / authority submissions					
Construction / fit-out work					
Site review / reporting					
Testing / handover / records					

Use the candidate's actual team and written offer. A practice name or portfolio does not establish who performs a service, who attends site, who controls specialist information or who is authorized to instruct work. Carry the agreed schedule into the proposal and contract rather than leaving it only in interview notes.

SHEET 4

Phasing, logistics and operational continuity plan

Map each work area to the people, systems, access route and recovery condition affected. A phase is ready only when its temporary arrangements, shutdowns, permits and return-to-use evidence are defined.

ID	Area / work	People / function affected	Temporary arrangement	Access / isolation	Shutdown window	Release evidence	Owner /
P-01							
P-02							
P-03							
P-04							
P-05							
P-06							

SHEET 4B

Site logistics controls

Turn the building procedures and operating constraints into named site controls. Record the current evidence, owner and date rather than relying on a generic method statement.

Control	Required plan	Evidence / owner / date
Contractor access	Registration, induction, permits, escorts, keys and daily close-down	
Materials and waste	Loading, lift booking, storage, protection, debris route and cleaning	
Noise / dust / odor	Restricted hours, containment, monitoring, communication and recovery	
Systems continuity	Power, network, cooling, security, fire systems and planned isolation	
Staff / client communication	Lookahead, route changes, outages, contacts and fallback plan	

SHEET 5

Pricing, appointment and handover readiness

Use one final check before accepting a proposal or releasing work. Record the evidence and unresolved qualification; a checked box without a document reference does not close the item.

Gate	Minimum evidence	Reference / revision	Open qualification / owner
Brief	Business outcome, workplace schedule, constraints and success measures approved		
Existing facts	Survey scope, building inputs, technical interfaces and unresolved risks recorded		
Design basis	Current drawings, schedules, specifications and open-item register identified		
Team / roles	Named people, deliverables, consultants, site attendance and exclusions aligned		
Commercial comparison	Quantities, allowances, exclusions, taxes, direct purchases and fees normalized		
Programme	Approvals, decisions, procurement, phasing, moves, tests and handover dependencies shown		
Contract controls	Authority, payment evidence, insurance, change, delay, suspension and closeout reviewed		
Handover	Tests, training, snags, warranties, manuals, records, access and operational release defined		

SHEET 5B

Appointment decision record

Record the selected proposal, accepted qualifications and conditions that must close before appointment. The authorization should point to the controlled proposal, clarifications and contract documents actually accepted.

Candidate / proposal		**Decision date**	
Accepted qualifications			
Conditions before appointment			
Authorized by / evidence		**Next controlled issue**	

Adapt this workbook with the appointed professionals, building representatives and contract advisers appropriate to the project. Preserve each issued revision so later decisions can be traced to the brief and evidence actually available at the time.