



## **Scope Statement**

for

## **The Northumbria Building Centre**

The scope statement is an agreement among the project team, the project sponsor and key stakeholders. It represents a common understanding of the project for the purpose of facilitating communication among the stakeholders and for setting authorities and limits for the project manager and team. The scope statement includes relating the project to business objectives, and defining the boundaries of the project in multiple dimensions including approach, deliverables, milestones, and budget.

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## A. Executive Summary

This project is concerned with the design of the building to house Northumbria Building Centre Ltd.

Deliverables included:

- Client Brief
- Feasibility Report
- Energy Strategy Report
- BREEAM Pre-Assessment
- Outline Proposals (Drawings)
- Design Stage Submissions (Drawings)
- Energy Statement

Scope:

- Space Heating
- Mechanical Ventilation
- Air Conditioning
- Electrical Installation and Lighting
- Water Services and Drainage

**Costs:** The anticipated budget for the M&E and renewable components of the project is £1,100 000.00

**Time:** Expected possession date – June 2012. The Building will need to be finished and ready for its opening 18 months after possession. Completion date Christmas 2013.

## B. Business Objectives

The Northumbria Building Centre will also support the Trust's core aims and objectives by providing a long needed centre in the north-east of England for the display of materials, products and equipment for the building, construction and building services industries. The Trustees also wish that the building be an example of good building practice and showcase the use of renewable energy and sustainable practices.

The Centre will be located on land provided by the University of Newcastle-upon-Tyne. It will incorporate a library for manufacturers' and suppliers' literature and will have a comprehensive information retrieval system based on the latest information technology techniques for the research and location of materials, products and equipment both from the UK and overseas.

The Centre will also provide facilities for promotional launches, special exhibitions and demonstrations and will also be able to host lectures, conferences and other events for local organisations and professional bodies.

There will also be an educational element to its activities which will provide programmes for schools and colleges.

The Centre must therefore provide accommodation for displays, storage and study of the exhibits and information and, of course, facilities for visitors.

The Centre should attract local residents, members of the building, construction and building services professions, educational groups and be a venue for courses, conferences and seminars. The business plan forecasts visitor levels in the first year to be about 10,000 annually, with about 1,300 a month during the summer rising to 30-50,000 annually after five years.

### **1. Business Need/Opportunity/Objectives**

Over the last two years the Trust has experienced a reduced level of income, due primarily to poor performance of the investment portfolio and a reduction in charitable donations. To counteract this decline in income the Governors have decided to use money from the trust to create a wholly owned trading subsidiary, the Northumbria Building Centre Ltd: the trust will own 100% of the shares in NBC Ltd, and NBC Ltd will contribute to the Trust via the Gift Aid Scheme.

### **2. Product Description (Solution)**

This project is concerned with the design of the building to house Northumbria Building Centre Ltd.

### **3. Deliverables**

Deliverables included:

- Client Brief
- Feasibility Report
- Energy Strategy Report
- BREEAM Pre-Assessment
- Outline Proposals (Drawings)
- Design Stage Submissions (Drawings)
- Energy Statement

*Exclusions:*

- Implementation of the new service
- Implementation of the feasibility study recommendations
- Maintenance of the new system

## C. Project Description

### 1. Scope

#### Includes:

- Space Heating
- Mechanical Ventilation
- Air Conditioning
- Electrical Installation and Lighting
- Water Services and Drainage

### 2. Completion Criteria

We will communicate our designs using Sketch Layout and Sketch Schematic drawings.

Where space is constrained, co-ordinate drawings (plan and section) will be produced to demonstrate that the systems will fit.

### 3. Risk Assessment

A full CDM Risk Assessment shall accompany the design package.

The health and safety at work act 1974 will apply.

The working at height regulations will apply.

The Construction (Design and Management) Regulations 2007 will apply.

Workplace health, safety and welfare. Workplace (Health, Safety and Welfare) Regulations 1992 will apply.

The project is notifiable and an F10 shall be prepared and issued by the Contactor who may employ a suitably qualified health and safety consultant.

### 4. Constraints

**Costs:** The anticipated budget for the M&E and renewable components of the project is £1,100 000.00

**Time:** Expected possession date – June 2012. The Building will need to be finished and ready for its opening 18 months after possession. Completion date Christmas 2013.

**Space:** An outline design has been produced by the architect to meet the Client's spatial requirements.

**Occupancy:** The normal and expected occupancy is as follows:  
3 Office staff, 1 receptionist, 2 kitchen staff (1 part time for events), 2 workshop staff (1 part time for events) and 1 member of staff for the display area. The normal working hours for the staff being 9am to 5pm from Monday to Friday and 8am to 10am weekdays for the cleaner.

The canteen will have a seating capacity of 40 people while maximum occupancy will be 250 people at any one time.

**Ventilation:** A survey of the site has revealed that due to noise and air pollution it would not be practicable to use natural ventilation and therefore the building will have sealed, glazing units and air conditioning. However some form of natural ventilation may still be possible and shall be researched.

**Legal:** The Client is unaware of any restrictions or regulations in place by the local council on planning as far as renewable energy systems to new builds are concerned.

1. The structural design is final.
2. No arboriculture report has been made.
3. There is no soil report nor are there bore hole samples.
4. There are no special supply chains or manufacturers that the client wishes to adhere to.
5. The Client wishes both SBD and DDA guides/standards to be applied.
6. No less than 20% renewable technology is to be used in order to achieve a good BREEAM rating.

## 5. Roles and Project Stakeholders

### Roles

The following role definitions are being applied to the resources assigned to this project:

<b>Project Sponsor</b>	Provides executive team approval and sponsorship for the project. Has budget ownership for the project and is the major stakeholder and recipient for the project deliverables.
<b>Project Owner</b>	Provides policy definition to the Project team. Resolves all policy issues with the appropriate policy owners in order to provide a clear, decisive definition. Makes final decisions and resolves conflicts or issues regarding project expectations across organizational and functional areas. The project owner and the project manager have a direct link for all communication. The project manager will work directly with the project owner on all policy clarification.
<b>Project Manager</b>	Provides overall management to the project. Accountable for establishing a Project Charter, developing and managing the work plan, securing appropriate resources and delegating the work and insuring successful completion of the project. All project team members report to the project manager. Handles all project administrative duties, interfaces to project sponsors and owners and has overall accountability for the project.
<b>Steering Committee</b>	Provide assistance in resolving issues that arise beyond the project manager's jurisdiction. Monitor project progress and provide necessary tools and support when milestones are in

	jeopardy.
<b>Stakeholder</b>	Key provider of requirements and recipient of project deliverable and associated benefits. Deliverable will directly enhance the stakeholders' business processes and environment. Majority of stakeholders for this project will be agency heads, CIO's and project management representatives.
<b>Team Member</b>	Working project team member who analyzes, designs and ultimately improves or replaces the business processes. This includes collaborating with teams to develop high level process designs and models, understanding best practices for business processes and partnering with team members to identify appropriate opportunities, challenging the old rules of the business and stimulating creating thinking, and identifying organizational impact areas.

### Project Team

- Project manager
- Architect
- Structural Engineer
- Suppliers
- Utilities
- Contractors
- Local authorities
- Government agencies
- Consultants

## Stakeholders

Positive stakeholders					
Negative stakeholders		Significant	Some	Little	None
	Significant	Client Sponsor Project manager Project Team Project office Contractors Subcontractors Suppliers Consultants Management Site Personnel End Users			
	Some	Disgruntled end user Pressure groups Competitors	Press (media) Families Accounts Dept HR dept Banks Politicians Residents' associations Local authorities Government agencies Technical departments Utilities Insurers Unions		
	Little	Disgruntled employees			
	None				



## D. Project Approach

### Planned Approach

The project will follow a traditional path, with no phasing requirements. The main Contractor will undertake all works except for pre-approved sub-contractors and specialists.

## E. Project Estimates

### 1. Estimated Schedule

Key Project milestones relative to project start are as follows:

Project Milestones	Target Date
Project Start	June 2012
Project Completion	December 2013

### 2. Estimated Cost

Expense	Original Budget	Current Budget	Spent to Date	Est. to Complete	Current Forecast	Variance
Electrical						
Lighting	£102,000.00					
Small Power	£86,250.00					
Photovoltaics	£138,000.00					
Security	£57,500.00					
Emergency Lighting	£34,500.00					
Telecommunications	£46,000.00					
Mechanical						
Water services	£63,250.00					
Waste	£28,750.00					
Rainwater	£17,250.00					

Air conditioning	£80,500.00					
Heating	£115,000.00					
Ventilation	£51,750.00					
<b>Total</b>	<b>£ 820,750</b>					

### 3 Checkpoint/ Funding Schedule

- The project will be reviewed on a monthly basis with progress meetings.
- Monthly Interim Payments shall be produced by the Contractor and a Cost Report to be issued to the Client every month detailing any project savings.

## F. Project Controls

### 1. Weekly Team Meetings

### 2. Monthly Status Reports

### 3. Risk Management

*Ensure the project risks and associated mitigation actions are monitored and controlled in accordance with the Risk Management Plan*

### 4. Issue Management

Project-related issues will be tracked, prioritized, assigned, resolved, and communicated in accordance with the Project Management Procedures:

Issue descriptions, owners, resolution and status will be maintained on the project Blog in a standard format.

Issues will be addressed with the Project Owner and communicated in the project status report.

### 5. Change Management

The change control procedures to be followed will be consistent with Project Management Procedures and consist of the following processes:

A Blog will be established by the project team to track all changes associated with the project effort.

All Change Requests will be assessed to determine possible alternatives and costs.

Change Requests will be reviewed and approved by the project owner.

The effects of approved Change Requests on the scope and schedule of the project will be reflected in updates to the project plan.

The Blog will be updated to reflect current status of Change Requests.

### 6. Communication Management

The following strategies have been established to promote effective communication within and about this project:

The project team will have weekly update/status meetings to review completed tasks and determine current work priorities. Minutes will be produced from all meetings.

A project blog will be established on the Internet to provide access to the project documentation by geographically dispersed project members.

## **G. Authorizations**

**The Scope Statement will be approved by:**

The Project Manager

The Project Owner

The Project Sponsor

**Project Changes will be approved by:**

The Project Owner

**Project deliverables will be approved/accepted by:**

The Project Owner

The Project Sponsor

The key Stakeholders

Specific task responsibilities of project resources will be defined in the Project/work Plan.

## H. Scope Statement Approval Form/Signatures

### Scope Statement Approval Form

**Project Name:**

**Project Manager:**

The purpose of this document is to provide a vehicle for documenting the initial planning efforts for the project. It is used to reach a satisfactory level of mutual agreement between the project manager and the project sponsors on the objectives and scope of the project before significant resources are committed and expenses incurred.

I have reviewed the information contained in this Scope Statement and agree.

Name	Signature	Date

*The signatures of the people above relay an understanding in the purpose and content of this document by those signing it. By signing this document you agree to this as the formal Project Scope Statement.*