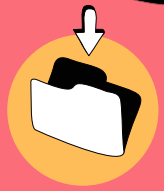
Starting Right

The Capsa Project Guide

GUIDE



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Intro

You've got planning permission — now the real work begins. Before diving into detailed design, here are the essentials to line up so your project runs smoothly. Think of this as your pre-flight checklist: skip it, and turbulence is almost guaranteed.

Architects, don't roll your eyes — yes, you already know this stuff. But you might find it handy to use this guide with your clients. Or even as a checklist for your first kick-off meeting. Saves you having to explain the same basics ten times over.

Capsa exists to make projects simpler, clearer, and easier to run. This guide brings together the lessons we've seen go wrong too many times. Use it as a reference, a conversation starter, or even just a safety net. Projects that start well, run well.

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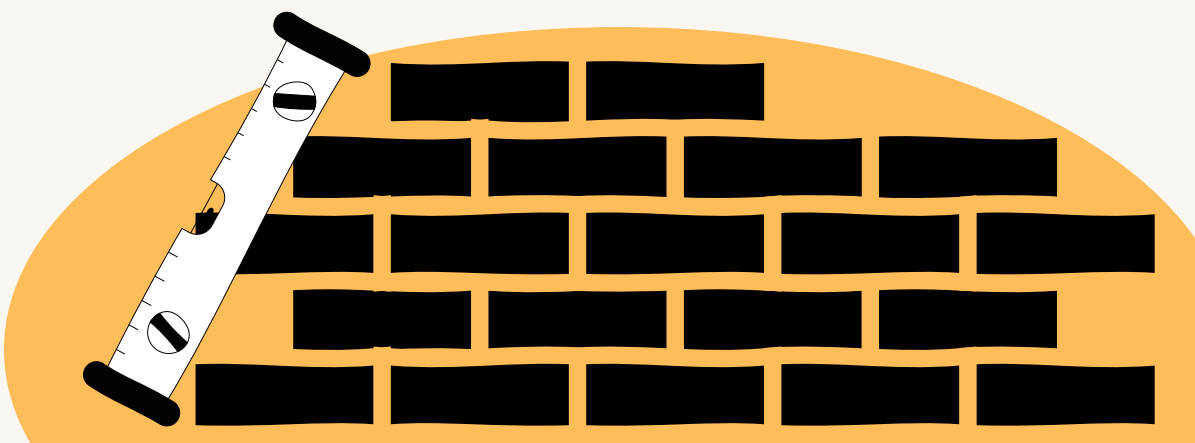

Section A — Scope, Budget & Procurement

This is the foundation of your project. Get this wrong and everything else wobbles.

- **Project brief**
  Agree the goals and requirements, but don't assume they're fixed. Projects evolve. Update the brief as decisions change, and benchmark new choices against it. Otherwise, why are you making that decision?

- **Budget baseline**
  Agree not just the number, but how the budget will be developed, tested, and reappraised as design evolves. Build in contingencies — and get some honest cost advice at this stage, it'll save you massive heartache later.

- **Programme**
  Set a realistic timeline with milestones, but also get buy-in from every team member on their timescales. Build in checkpoints to monitor progress and coordination time between disciplines. Spotting delays early is far easier than rescuing them later.

- **Procurement route**
  Decide on traditional tender vs negotiated approach, and make sure everyone understands what it means. And regardless of route, get honest early advice from the building team — waiting until later often means budget and design drift apart.

"Agree the budget and how it will be tested — **not** just the number."

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When the Numbers Break

It's almost a cliché. A client sets a budget based on nothing more than what they have in the bank or what they think the project should cost. The architect, eager to keep things moving, either never asks or nods politely and starts sketching anyway. Months later, the brief has ballooned, the drawings look great, but no one has asked a builder or QS for a reality check. The first time real costs hit the table? At tender. Cue panic when the bids come back two or three times the original figure. Suddenly the choices are: scrap the project, butcher the design, or the client finds more funds. We've even had architects admit, "If I'd known that was the budget from the start, I'd have designed something else." A painful scramble that could have been avoided with honest cost advice early on.

Section B — Team & Responsibilities

Projects succeed when everyone knows who's doing what, and who's making the calls. Vagueness always costs time and money.

- **Project decision-maker**
  Identify who this is and make it clear what decisions they need to make and when.
- **Lead consultant**
  Appoint the professional coordinating the design. Don't forget to also appoint the Principal Designer for CDM regulations early — it's a statutory requirement.
- **Consultant team**
  Decide which roles are needed (structural engineer, M&E, QS, planning consultant, etc.) and when each will be appointed.
- **Design responsibility**
  Create a Design Responsibility Schedule to clarify responsibilities so there are no overlaps or gaps.
- **Communication**
  Agree how the team will communicate and resolve queries. Good comms plans prevent endless "I thought you were doing it" moments.

"Clarity now avoids conflict later."

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When the Drains Get Dodged

Drainage isn't the most glamorous part of a project, but it's a perfect example of what goes wrong when responsibilities aren't clear. We've lost count of the times we've been told it's not the architect's job, not the M&E consultant's, not the engineer's — maybe it should be "contractor design." Why? Because no one appointed a civil engineer, someone wanted to save fees or pass the risk onto the builder, or it was treated as an afterthought. The result? Drainage gets kicked down the road until the builder's on board, or until the right consultant is finally appointed. But drainage isn't some mystical specialist package — it's basic civil engineering. Push it off the table too long and it comes back later, costing more money, more time, and usually more arguments.

Section C — Information & Release

Good projects run on good information. Poor projects run on assumptions.

- **Information release**
  Agree who issues what, and when, so information flows are planned not chaotic.

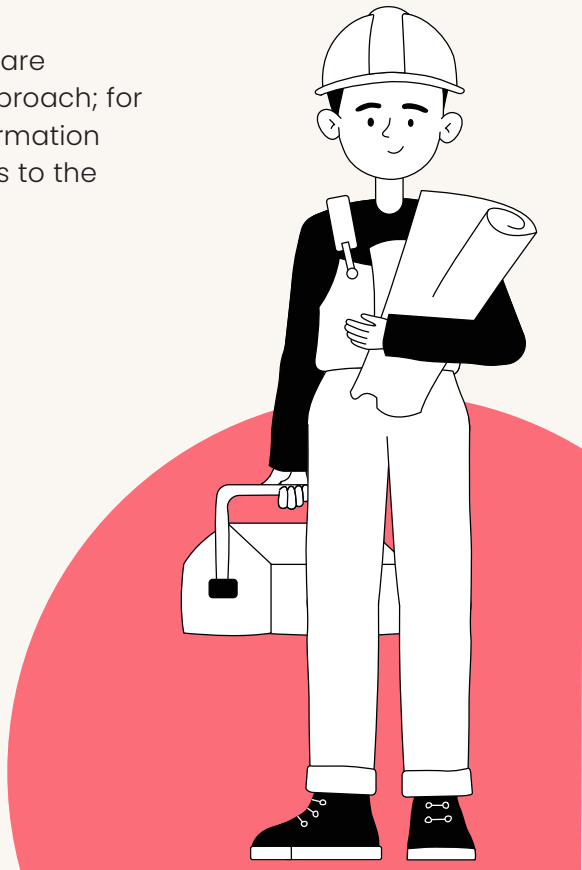
- **Surveys and investigations**
  Complete site, utilities, structure, and services surveys before commencing design work. Skipping this step is an expensive gamble — and it will only slow down your design later on.

- **Approvals and consents**
  Confirm approvals and conditions, and make sure all statutory consents are documented. Be warned — these always take longer than you think, so get ahead of them early.

- **Drawings and specs**
  Share and coordinate early design information so everyone starts from the same page.or gaps.

- **Design fundamentals**
  Set out the basics of consistency now — floor plans aligned in the same orientation across all consultants, gridlines coordinated between disciplines, drawing standards agreed. These simple steps prevent chaos later. Capsa helps here too, by keeping information consistent, labelled, and version-controlled from the start.

- **Design development approach**
  Agree how the design will be developed before consultants are appointed. For smaller projects this may be a traditional approach; for larger or more complex projects it may involve Building Information Modelling (BIM). Either way, set it out early so everyone works to the same process.



"Alignment matters — on paper and in practice."

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When the Drawings Clash

On more projects than we can count, consultants issue their floor plans in completely different orientations to each other. Add in inconsistent gridlines and random paper sizes, and suddenly coordinating a set of drawings feels more like solving a jigsaw than designing a building. It might sound basic, but having the building scaled and orientated consistently between consultants makes it instantly easier to understand a project. Now imagine being a QS trying to measure quantities from that chaos — or a neurodiverse team member who just needs clarity. Instead, they're wrestling with mismatched layouts that make simple comparisons ten times harder. Accessibility isn't just about ramps and door widths — it's about making sure your information is set up so everyone can actually read and use it. Alignment matters.

Section D — Risk, Funding & Readiness

Every project has risks, but the trick is spotting the ones that matter early enough to do something about them.

- **Project risks**
  Focus on project-specific risks that could affect this stage or have lasting impacts — not generic "health & safety" lists. Look at design, budget, programme, and external factors that could derail progress.
- **Funding and insurance**
  Confirm these early. They can directly influence the design, the budget, and the procurement choice. Better to know now than redesign later.
- **Decision log**
  Keep a running record of what's been agreed. It avoids circular debates when memories fade.

"Consult funders early — before the brief gets broken."

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When the Design Has No Cover

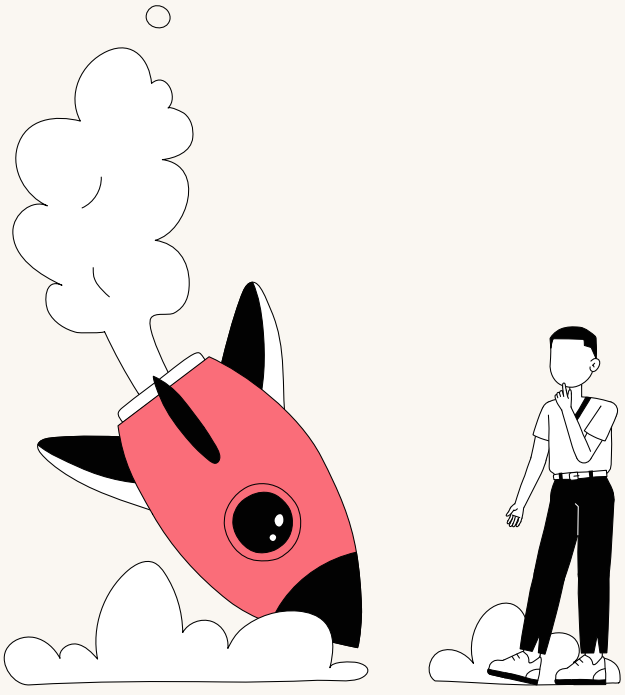
Picture this: a design sails through planning and detailed design with timber cladding specified inside and out. It's a key part of the client's brief, the architect's drawings look great — until the architect's insurer steps in. Off the back of post-Grenfell restrictions, the insurer refuses to cover rainscreen cladding, which includes the very timber the architect has specified. Suddenly, the architect can't take responsibility for a design they themselves created and tries to push it onto the contractor. The builder, rightly, doesn't want to carry design liability for something outside their scope, so the client is left with a mess. Either take out extra insurance, bring in a third party, or compromise the design that was central to the brief. Cue last-minute costs and compromises that could have been avoided if insurers were consulted at the start, not just before contracts were signed.

Section E — Next Checkpoint

This is your first pre-flight check: planning approval through detailed design and procurement, right up to building contracts.

Before contracts are signed and work starts on site, revisit these items. But note: at that stage there's also a mobilisation checklist — covering contracts, insurances, and start-on-site readiness — which isn't detailed here. That's a guide for another day.

"Mobilisation is the take-off.
Do your pre-flight checks."



When the Start Goes Wrong

Mobilisation is where the project really begins, and it sets the tone for the whole build. On our projects, we can trace so many issues back to poor mobilisation or an unclear brief — where expectations weren't nailed down, responsibilities weren't clear, or key details were skipped. The result? Problems that snowball during construction, long after they could have been fixed with an extra hour around the table. Think of this guide as your pre-flight checks. Mobilisation is the take-off. And no one wants to discover mid-air that the fuel tank isn't full.

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Checklist

This is the bit where you save yourself from future headaches. Think of it as the “did you pack your passport?” moment before the flight. Forget one of these and you’ll spend the project scrambling. Tick them off now, and you’ll thank yourself later.

Project Scope & Programme

- [ ] Clear project brief (updated as goals change)
- [ ] Realistic programme with milestones, buy-in, checkpoints, and coordination time
- [ ] Project decision maker identified

Budget & Procurement

- [ ] Budget baseline agreed, with approach for reappraisal and contingencies
- [ ] Procurement route decided, with early builder input

Team & Responsibilities

- [ ] Wider consultant team roles identified and appointed
- [ ] Design responsibility schedule completed

Information & Release

- [ ] Early drawings and specifications coordinated
- [ ] Design fundamentals agreed (orientation, grids, sizes)
- [ ] Design development approach set (traditional vs BIM)
- [ ] Information release schedule established

Risk, Funding & Readiness

- [ ] Project-specific risks identified
- [ ] Surveys and investigations complete
- [ ] Funding and insurance requirements confirmed

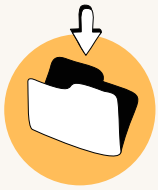
Project Status

- [ ] Ready to Start

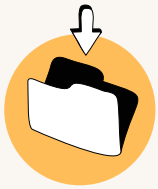
Capsa Tools

Projects that start well, run well. Use this guide alongside our templates to give your team the best chance of success. And remember — Capsa is built to make these fundamentals easier to manage, so your project stays clear, consistent, and on track.

Pair this guide with our free templates:



Information Release Schedule



Design Responsibility Schedule