Project manual

The Courtyard House / Planning, coordination and work divisions



PROJECT INTENT

Low rooflines and natural materials draw daily life into a private garden.

PROJECT-SPECIFIC FOCUS

Field dimensions; actual structural system; local zoning; egress and systems coordination; site and flood constraints.

Original sample organized by relevant CSI MasterFormat divisions and construction-document coordination principles. CDT is an individual CSI certification; no CDT credential, CSI endorsement or accredited document status is claimed.

This manual is a planning example, not contract specifications, construction instructions or a permit package. Project means, methods and technical designs must be established by the responsible parties.

From measured home to new design.

01 / Define the project

Owner and design team confirm the brief, target budget, property location, occupancy, access needs and expected deliverables. Separate must-have spaces from optional work.

02 / Measure and record

Our as-built teams measure the existing structure, photograph accessible conditions, record levels and openings, and create the agreed CAD, Revit or Chief Architect base. Concealed elements remain marked unknown.

03 / Establish constraints

Review survey, zoning, flood information, existing services, ownership and local submission rules. Identify required licensed participation and investigations before regulated work is commissioned.

04 / Compare schematic options

Compare retained and proposed areas, circulation, daylight and exterior integration. Record the selected option and reasons for rejecting alternatives in the worksheet.

05 / Resolve the interfaces

Coordinate the existing/new junctions and obtain required specialist input. Agree the room program, envelope strategy, service implications and project-specific documentation scope.

06 / Prepare and review documents

Prepare the applicable project documents from the measured base with required qualified participation. Check coordination and obtain necessary owner decisions and authority reviews.

07 / Coordinate the work

The contractor develops means, methods, temporary works, safety and phasing. Track submittals and questions; resolve concealed-condition discrepancies before affected work continues.

08 / Verify and close out

Arrange required inspections and testing, complete the punch list, record changes and collect warranties, maintenance information and final record documents.

Work division outline

General / Products & records / Execution & hold points

DIVISION 00 | Procurement and Contracting Requirements

GENERAL
Agree scope, exclusions, delivery format, schedule, fees and authorized decision-makers. Separate concept services from the later project-specific document scope.

PRODUCTS / RECORDS
Written brief, accepted scope, responsibility matrix and procurement route.

EXECUTION / HOLD POINT
Owner and provider resolve scope and responsibility before site work or design release.

DIVISION 01 | General Requirements

GENERAL
Coordinate meetings, document numbering, survey dates, drawing status, revisions, substitutions, requests for information and site access. Identify occupied areas and protection responsibilities.

PRODUCTS / RECORDS
Survey checklist, document register, revision log, submittal log and meeting records.

EXECUTION / HOLD POINT
Contractor submits sequencing, protection and access arrangements; owner confirms household constraints.

DIVISION 02 | Existing Conditions

GENERAL
Record room dimensions, levels, openings, visible assemblies and service locations. Mark concealed or inaccessible items unknown. Arrange qualified investigation for suspected hazardous materials or concealed defects.

PRODUCTS / RECORDS
Measured base, photo index, existing-condition model and uncertainty register.

EXECUTION / HOLD POINT
Do not authorize removals from a sample image. Field verification and project-specific reviewed information precede work.

DIVISION 03 | Concrete

GENERAL
Determine whether new footings, foundation walls or slab work are part of the measured scope. Coordinate existing/new interfaces, moisture strategy, openings and inspection requirements.

PRODUCTS / RECORDS
Project-specific foundation information and relevant material submittals.

EXECUTION / HOLD POINT
No dimensions, reinforcement or bearing assumptions are supplied by this schematic.

Work division outline

General / Products & records / Execution & hold points

DIVISION 04 | Masonry

GENERAL
Survey existing brick or block where affected. Record cracking and finish condition; coordinate lintels, flashings, movement interfaces and matching or deliberately contrasting materials.

PRODUCTS / RECORDS
Condition photos, selected sample panel and coordinated interface details.

EXECUTION / HOLD POINT
Qualified review determines support requirements and suitability of retained masonry.

DIVISION 05 | Metals

GENERAL
Identify any required beams, columns, connectors, guards or stairs only through project-specific coordination. Verify compatibility, corrosion exposure and connections to retained materials.

PRODUCTS / RECORDS
Reviewed shop information, finish samples and connection coordination records.

EXECUTION / HOLD POINT
Fabrication and installation proceed only from the appropriate approved project documents.

DIVISION 06 | Wood, Plastics, and Composites

GENERAL
Coordinate new framing and joinery with verified existing dimensions. Identify structural work separately from finish carpentry. Coordinate built-ins, backing and moisture exposure.

PRODUCTS / RECORDS
Framing information where required, product data, millwork studies and field dimension checks.

EXECUTION / HOLD POINT
Temporary support, fastener schedules and load paths require project-specific responsible design and contractor planning.

DIVISION 07 | Thermal and Moisture Protection

GENERAL
Develop continuous roofing, wall drainage, air-sealing and insulation strategies at each retained/new junction. Coordinate flashings, roof slopes and water discharge before finishes conceal the work.

PRODUCTS / RECORDS
Envelope junction review, material data and agreed inspection/photos before enclosure.

EXECUTION / HOLD POINT
Do not cover unresolved leakage, damaged materials or unreviewed interfaces.

Work division outline

General / Products & records / Execution & hold points

DIVISION 08 | Openings

GENERAL
Verify rough openings, daylight, privacy, safety glazing, operation and weather performance. Coordinate changed openings with structure, egress and finish dimensions.

PRODUCTS / RECORDS
Door/window schedule, product selections, rough-opening confirmation and interface details.

EXECUTION / HOLD POINT
Order after field dimensions and project-specific performance requirements are confirmed.

DIVISION 09 | Finishes

GENERAL
Select flooring, wall and ceiling finishes around measured substrates, transition levels, moisture exposure and maintenance goals. Review samples in actual light.

PRODUCTS / RECORDS
Finish schedule, samples, substrate acceptance and transition study.

EXECUTION / HOLD POINT
Close concealed work inspections before finish installation; protect completed work.

DIVISION 10 / 12 | Specialties / Furnishings

GENERAL
Coordinate accessories, storage, furniture clearances, shading and casework. Establish backing and support needs before closing surfaces.

PRODUCTS / RECORDS
Accessory and furniture layout, sample selections and clearance review.

EXECUTION / HOLD POINT
Verify fit and operation against actual measured rooms and installed service locations.

DIVISION 11 | Equipment

GENERAL
For kitchens, outdoor kitchens or specialty rooms, identify appliance and equipment selections, clearances, access and service requirements. Coordinate the selected equipment with the room program and responsible trades.

PRODUCTS / RECORDS
Equipment schedule, manufacturer data, finish selections and coordinated service information.

EXECUTION / HOLD POINT
Confirm utility needs, ventilation, weather exposure and installation requirements before purchase and installation.

Work division outline

General / Products & records / Execution & hold points

DIVISION 21 | Fire Suppression

GENERAL
Determine whether the proposed use, added area or local rules require sprinkler work or modification. Coordinate coverage and affected construction through the appropriate qualified parties.

PRODUCTS / RECORDS
Written applicability determination and required specialist documents.

EXECUTION / HOLD POINT
Do not assume an existing system or an exemption. Confirm before concealing affected services.

DIVISION 22 | Plumbing

GENERAL
Verify existing routes and capacity where kitchens or bathrooms move or expand. Coordinate venting, access and fixtures through the responsible qualified trade.

PRODUCTS / RECORDS
Fixture schedule, routing/capacity review and required inspection records.

EXECUTION / HOLD POINT
No pipe sizing or connection method is prescribed in this concept manual.

DIVISION 23 | Heating, Ventilating, and Air Conditioning

GENERAL
Assess loads, comfort, fresh-air needs and distribution for new or changed rooms. Coordinate equipment, noise, access and penetrations through responsible qualified parties.

PRODUCTS / RECORDS
Room-use brief, load and system review, equipment information and commissioning records.

EXECUTION / HOLD POINT
Do not extend existing equipment solely on the basis of added floor area or a rendering.

DIVISION 26 | Electrical

GENERAL
Coordinate lighting intent, receptacle use, equipment loads, panel capacity and affected circuits through the responsible qualified trade. Review the reflected-ceiling concept with services and finishes.

PRODUCTS / RECORDS
Lighting selection record, capacity review, coordinated layout and inspection records.

EXECUTION / HOLD POINT
Isolation, energization and installation remain qualified-trade tasks governed by the actual project documents.

Work division outline

General / Products & records / Execution & hold points

DIVISION 27 / 28 | Communications / Electronic Safety and Security

GENERAL
Coordinate network, audiovisual, alarms and detection needs with planned rooms and retained systems. Verify code-required coverage and interconnection through appropriate parties.

PRODUCTS / RECORDS
Device/coverage review, equipment record and testing checklist.

EXECUTION / HOLD POINT
Confirm compatible devices, routes and required approvals before closing walls.

DIVISION 31 | Earthwork

GENERAL
For a new footprint, verify survey, buried utilities, access, existing foundations, proposed grades and the need for geotechnical input. Coordinate temporary drainage and protection of neighboring property.

PRODUCTS / RECORDS
Survey control, utility records, ground information and site logistics plan.

EXECUTION / HOLD POINT
Excavation means, temporary support and safety arrangements are developed by responsible qualified parties.

DIVISION 32 | Exterior Improvements

GENERAL
Coordinate decks, patios, gazebo, planting, access and drainage with surveyed grades and retained structures. Establish maintenance access and avoid directing water toward the house.

PRODUCTS / RECORDS
Outdoor layout, material samples, planting intent and coordinated level study.

EXECUTION / HOLD POINT
Guard, stair, support and utility requirements need project-specific resolution before construction.

DIVISION 33 | Utilities

GENERAL
Confirm service entries, capacities, easements and any relocation needed for the proposed footprint. Coordinate with utility owners and local authorities.

PRODUCTS / RECORDS
Utility coordination log, approvals and verified connection locations.

EXECUTION / HOLD POINT
Do not assume routes or move services from a conceptual diagram.

Keep every decision traceable.

FIELD VERIFICATION HOLD POINT

Confirm these issues for The Courtyard House: Field dimensions; actual structural system; local zoning; egress and systems coordination; site and flood constraints. Do not treat illustrative conditions as verified field facts.

COORDINATION MATRIX

For every affected assembly, record existing condition, proposed change, responsible party, input required, review status and release date. Identify a single owner decision-maker and a revision owner.

REQUESTS FOR INFORMATION

Number each question. Cite the relevant document and location; attach an annotated photo. Record the response, cost/schedule effect and any revised document. Verbal instructions are documented before incorporation.

SUBSTITUTIONS AND CHANGES

Compare performance, compatibility, appearance, availability, cost and maintenance. Obtain required approvals before purchasing or installing an alternative. Log the change and distribute the current revision.

CLOSEOUT RECORD

Collect applicable inspections, tests, punch-list completion, product manuals, warranties, care guidance, equipment information and agreed CAD/model record updates. State what was actually field-verified.

DOCUMENT BASIS

CSI MasterFormat is an information organization framework. CSI CDT concerns individual construction-document knowledge; it is not project approval. Reference: csiresources.org/certification/cdt and csiresources.org/standards/masterformat.