

# Pilot your project

with the

# CBC

method

**C**ontractual

**B**asis

of **C**onstruction



This document contains :

- Information page
- Space on the cover page header where you can place your logo
- Cover page with client/business and project data
- Chronological approach helping you to select the services (pages 4 to 6) which are associated with corresponding numbers to a profession
- A simplified version is available in a box on page 4. Full version see M - L
- List of professions with their CBC numbers, listed on pages 8 to 11

Thanks to our chronological approach from page 4, you will be able to pilot with peace of mind :

- The feasibility of the project
- The variant for the study

You will also be able to :

- Establish a quote (budget) for the study phase
- Establish a quote (budget) for the execution phase
- Carry out and monitor work
- Find the right provider, using the CBC contract links with our search engine “[gerer-construire.ch](http://gerer-construire.ch)”

Advantages of the checklist in CBC format :

- Demonstrate confidence towards stakeholders through appropriate support
- Keep a structured overview in order to follow the project from A to Z
- Promote your work throughout the project
- Save valuable time
- Minimize oversights

Concretely, this document allows you to :

- Determine the project phases
- Find the right contracts using the CBC group classification
- Locate the works to be carried out and determine the element
- Establish the specifications for the choices of principle
- Specify the type of contracts for subsequent sorting; they are classified into 6 categories :  
**Construction\* Supply Installation Management Disbursements Maintenance**

#### Examples :

- For the *s*upply and *i*nstallation of heating :

#### **C 3310.01 Heating installation**

*Assigned to company NAME*

- For heating *m*ain *t*enance :

#### **Mt 3310.02 Heating installation**

*Assigned to company NAME*

\* Supply and installation

#### USAGE TIPS

- Ideally, it is preferable to have a file of the existing plans or the project carried out by an architect to facilitate the selection of contracts.
- This document is to be used during your first meeting at the project site and/or with the project owner (PO).
- The file can be supplemented with photos and videos. For each video, remember to state the problem and, if possible, the envisaged solution, and, if known, the contract number. This will facilitate research and understanding at the time of calls for tenders.
- For large projects, consider conducting a laser scan to obtain a point cloud. This allows you to have a guided tour and a virtual 3-dimensional basis for measuring everything, without the need to return to the field (contract concerned : M 7420).
- We recommend using the SIA (Society of Engineers and Architects) standards for the services of all project stakeholders.

#### SUMMARY OF CBCs

0	LAND AND CONNECTIONS	*	p. 8
1	PREPARATORY WORKS	*	p. 8
2	CONSTRUCTION WORKS	*	p. 8
3	INSTALLATIONS	*	p. 10
4	SPECIFIC INSTALLATIONS	*	p. 10
5	EQUIPMENT	*	p. 11
6	FURNISHING AND DECORATION	*	p. 11
7	MANAGEMENT (FEES AND MANAGEMENT EXPENSES)	*	p. 11
8	SECONDARY COSTS	*	p. 11

\*The complete list of contracts can be found on version (L)

**Gérer & Construire wishes you the complete success of your project!**

**THE PROJECT IS MANAGED BY**

			CUSTOMER / CASE
<b>CLIENT</b>	N° :	NAME :	
		Phone :	Email :
		TYPE :	Private, Public, Institution, Association...
<b>CASE</b>	N° :	NAME :	Name of the condominium, the building, the apartment, the villa...
		TYPE :	Residential, Commercial, Administrative, Service...
<b>PROJECT</b>			
	N° :	NAME :	Kitchen, Apartment, Stairwell, Roof, Envelope, Name of the PPE...
		ADRESS :	
		FURTHER INFORMATION :	Additional address if different, Floor, Occupant...
		TYPE OF BUILDING :	Residential, Commercial, Administrative, Service...
		TYPE OF WORKS :	New construction, Renovation, Transformation, Expansion, Energy improvement, Claim...
		LOCATION :	Kitchen, Apartment, Business, Facade, Envelope...
	FIRE VALUE :	20% OF THE VALUE :	
		For rented apartments, cantonal directive (e.g. for Vaud, amount of work: < 20%, form 53b, > 20%, form 53)	
	PROJECT PERIOD :	Beginning	End
<b>DIRECTOR OF WORKS</b>	NAME:	Function :	Architect, Project Manager...
(DW)	Phone :	Email :	
<b>PROJECT OWNER</b>	Name :	Function :	Owner, Architect...
(PO)	Phone :	Email :	
<b>PROJECT OWNER'S REPRESENTATIVE</b>	Name :	Function :	Architect, Project Manager...
(POR)	Phone :	Email :	
<b>CONCIERGE SERVICES</b>	Name :	Function :	Owner, Tenant, Employee, Business...
	Phone :	Email :	
<b>CONTACT PERSON ON SITE</b>	Name :	Function :	Owner, Tenant, Concierge...
	Phone :	Email :	
<b>ACCESS</b>	Entry code :	Keys at :	
<b>INFORMATION, REMARKS, CONDITIONS</b>			

DATE	CHRONOLOGICAL APPROACH : PRELIMINARY STUDY (SIMPLIED)	LINKS
	<b>ANALYSEN</b>	
	Search for contextual data (existing plans, cadastre, regulations, land register, etc.)	M 7010, 7850
	History of completed works (previously granted permits, work in progress, etc.)	M 7010, 7850
	Site visit (photo report, videos, etc.)	M 7010, 7850
	Subsidy, prior request for thermal studies and building insulation (federal, cantonal, municipal)	M 7430, 7010, 7850
	Thermal study	M 7430
	CECB (energy performance assessment on a scale of seven classes A to G)	
	CECB Plus (CECB supplemented with an advisory report including three constructive variants to reduce energy consumption)	
	Asbestos diagnosis (for all cases where construction took place before January 1, 1991)	M 7432
	Control on EU, EC, EP separation (separative, retention, infiltration, etc.)	M 7010, 7850
	<b>CHOICE OF SERVICES TO ESTABLISH FEES</b>	
	Fee proposal according to the decision of the PO based on the preliminary study	M ----
	Mandate for the preliminary study (analysis included)	
	Mandate for the pre-project study	
	Mandate for the project study	
	Mandate for tendering	
	Mandate for production and execution (DW)	
	Mandate for maintenance	
DATE	CHRONOLOGICAL PROCESS: PROJECT STUDY	LIENS
x	Project study according to the PO's choices	M ----
x	Complete data for the project	M ----
x	Use the support to manage all data (paper or digital)	M ----
	<b>PRELIMINARY DRAFT</b>	
	<b>Suche nach Parteien</b>	
	Survey of the existing (land, building, etc.)	M 7010, 7850, 7420
	Creation of existing plans (2D, 3D, BIM)	M 7010
	<b>Rough cost estimate (VARIANT 1)</b>	
	Order of magnitude of costs based on volumes	M 7010
	Validation by the PO	M 7820, 7825
	<b>Preliminary project file</b>	
	Studies by relevant managers according to the chosen option	
	Architect	M 7010
	Civil engineer	M 7210
	Other engineers	M 72--
	Preliminary project plans (1/200, 1/100, without details) or existing	M 7010
	Fire concept (form and plans for the investigation)	M 7010, 7436
	Radon diagnosis (if necessary)	M 7434
	Seismic study (according to cantonal rules)	M 7210
	<b>Cost estimate (VARIANT 2)</b>	
	Cost estimation based on volumes and surfaces	M 7010, 7440
	General planning to define deadlines	M 7010, 7850
	Validation by the PO of the preliminary project phase with the chosen options	M 7820, 7825
	<b>PROJET</b>	
	<b>Project of the work</b>	
	Taking into account the requirements of specialists and engineers	M 7010, 7850
	Selection of constructive principles, techniques, materials and finishes with the PO by location and by elements (simultaneously establishing the list of relevant stakeholders, by CBC)	M 7010, 7850
	Final project plan file required for the building permit application	M 7010
	Preliminary contact with administrative authorities to obtain favorable notices	M 7010, 7850
	Contact with immediate neighbors to present the project (if necessary)	M 7010, 7850
	Update of the plan file according to requests and/or comments from various contacts	M 7010
	<b>Quote (budget)</b>	
	Taking into account subsidies according to the variant(s) selected for the project	M 7010, 7850
	Original quote with measurements and indicative prices by CBC classification 1, 2, 4 digits	M 7010, 7850
	Deadlines, schedule update	M 7010, 7850
	Validation by the PO of the project phase	M 7820, 7825
	<b>PROCEDURE FOR REQUESTING AUTHORIZATION FROM PUBLIC AUTHORITIES</b>	
	<b>Preparation of all necessary documents</b>	
	Building permit application form	M 7010
	Surveyor's plan	M 7410
	Architect's plan file	M 7010
	Forms, files (energy proof, asbestos, fire protection, assets...)	M 74--, C 3---

DATE	CHRONOLOGICAL APPROACH: CALL FOR TENDER	LINKS
	<b>CALL FOR TENDERS PROCESS TO DEFINE THE BUDGET</b>	
	<b>Tender plans</b>	
	Execution file necessary for the call for tenders (plans, sections, facades, details, sketches, etc.)	M 7010
	<b>Calls for tenders (including sketches, plans, photos, etc.)</b>	
	Request a site visit from the owner, tenant, etc.	M ....
	Use or establish the list of speakers desired by CBC	M 7010, 7850
	List provided by the manager	
	List provided by the PO	
	Public call for tenders (if necessary according to criteria predefined by the authorities)	
	Definition of selection criteria with their weights for the public tender	M 7010
	Site visit with all stakeholders to present the project constraints	M 7010, 7050, 7850
	Request for bids	M 7010, 7850
	Orally communicated information	
	Through a concise specification document (purchase order, plan dossier...)	
	Through submissions based on offers returned by companies (with their agreement)	
	Through submissions based on a detailed specification	
	Establish a control table for the requests for bids	M 7010, 7850
	<b>Award phase (VARIANT 3)</b>	
	Determination of the cost of the work	
	Control of returned bids	M 7010, 7850
	Comparative tables with reference to the quote based on predefined selection criteria	M 7010, 7850
	Proposal for award to the PO	M 7010, 7850
	Revision of the cost of the work based on the selected bids	M 7010, 7850
	Provisional overall schedule based on input from stakeholders	M 7010, 7850
	List of selected stakeholders with corrected amounts	M 7010, 7850
	Creation of a document for cost control, with reference to the quote (original, amendments, revised) and the cost of work based on the bids received	M 7010, 7850
	Request for funding according to the original quote or revised estimate based on the choices of stakeholders	M 7010, 7850
	Funding denied by the PO	M 7820, 7825
	Funding accepted by the PO	M 7820, 7825
	<b>Award of selected companies</b>	
	Request for documents from stakeholders for the award (commercial register, debt collection office, payment of social charges, liability insurance, etc.)	M 7010, 7850
	Request for contractual guarantees and confirmation of payment conditions	M 7010, 7850
	Award letters to the selected stakeholders	M 7010, 7850
	Thank you letters to the stakeholders not selected	M 7010, 7850

NOTES

DATE	CHRONOLOGICAL APPROACH: EXECUTION	LINKS
	<b>EXECUTION PROJECT</b>	
	<b>Execution plans</b>	
	Execution file (1/50, 1/20..., with details)	M 7010, 72--
	<b>Company contracts</b>	
	by purchase order	M 7850
	by contract	M 7010, 7850
	<b>EXECUTION OF THE WORK</b>	
	<b>Architectural direction</b>	
	Supervision and control of the architectural concept	M 7010, 7040
	Presentation of samples, materials and finishes proposed by CBC for validation by the PO (color, appearance, implementation technique, etc.), minutes of PO's choices	M 7010, 7850
	<b>Director of works</b>	
	Obtain the building permit and take into account the comments before starting the works	M 7010, 7050, 7850
	Request authorization for the construction site sign	M 7010, 7050, 7850
	Execution of the construction site sign	M 1080
	Exterior construction site layout plan (access, fences, scaffolding, crane, truck cane location, toilets, power supplies, containers, use of the public domain, delivery, on-site safety, etc.)	M 7010, 7050, 7850
	Interior construction site installation (access, toilets, protection, power supplies, storage rooms, changing rooms, on-site safety, etc.)	C ----
	Availability of the asbestos report	C ----
	Request for public domain occupation	M 7010, 7050, 7850
	Notify the municipality of the start date of the construction site	M 7010, 7050, 7850
	Notify the municipality for the control of predefined stages according to the progress of the construction site (building layout, connections, insulation, samples, etc.)	M 7010, 7050, 7850
	Final works schedule considering order lead times	M 7010, 7050, 7850
	Notice of works for residents	M 7010, 7050, 7850
	Construction management (coordination and monitoring according to the CBC contracts selected, minutes, planning, additional offers, etc.)	M 7010, 7050, 7850
	Marking the finished meter	C ----
	Amendment proposal for validation by the PO	M 7010, 7050, 7850
	Taking photos and videos during the works (possibly laser scans, point clouds, etc.)	M 7010, 7050, 7850
	<b>Cost control</b>	
	Monitoring of cost control, reference to the quote (original, amendments, revised) and the cost of the work based on contracts and amendments	M 7010, 7050, 7850
	<b>COMMISSIONING, COMPLETION</b>	
	<b>Commissioning</b>	
	Report of detection and elimination of defects	M 7010, 7050, 7850
	Reception of works by contractors	M 7010, 7050, 7850
	Resident permit	M 7010, 7050, 7850
	Handover of the works to the PO	M 7010, 7050, 7850
	<b>Documentation of the work</b>	
	Revised documentation from the architect, engineers and specialists	M 7010, 7---
	Operations and maintenance documentation from contractors and suppliers	C ----, S ----
	<b>Administrative file</b>	
	Check and respond to all requests included in the building permit	M 7010, 7040
	<b>Warranty protection management</b>	
	Collection and control of guarantee certificates	M 7010, 7050, 7850
	Monitoring of works during the warranty period (2 years)	M 7010, 7050, 7850
	Monitoring of works during the warranty period (5 years)	M 7010, 7050, 7850
	Monitoring of latent defects works (10 years)	M 7010, 7050, 7850
	Warranty expiration, verification before archiving	M 7010, 7050, 7850
	<b>Final account</b>	
	Final account (works, fees)	M 7010, 7050, 7850
	<b>MAINTENANCE</b>	
	Creation of maintenance contracts (Mt)	M 7010, 7050, 7850
	Costs (monthly, annual)	M 7010, 7050, 7850
	<b>TO ARCHIVE</b>	
	Archived	M 7010, 7050, 7850



0 LAND AND CONNECTIONS		LOCATION, ELEMENTS, SPECIFICATIONS
1 PREPARATORY WORK		LOCATION, ELEMENTS, SPECIFICATIONS
C 1020	Inspection and report on the condition of pipes (heating, ventilation, EP, EU, EC)	
C 1110	Drying out of the building	
C 1200	Fixed and mobile scaffolding	
C 1300	Asbestos removal works (according to report G7432)	
C 1320	Heavy demolition (load-bearing element, structural work)	
C 1340	Sawing and coring	
2 CONSTRUCTION WORKS		LOCATION, ELEMENTS, SPECIFICATIONS
20 BIG WORK (BEARING STRUCTURE)		
C 2020	Masonry	
C 2050	Metal structure	
C 2070	Wooden framework	
21 SECOND WORK		
C 2130	Roof window (snuff box)	
C 2135	Roof dome	
C 2150	Bituminous waterproofing (flat roof, terrace and balcony)	
C 2170	Tinsmithing	
C 2180	Roofer	
C 2202	Window, French window (PVC)	
C 2204	Window, French window (wood)	
C 2205	Window, French window (wood-metal)	
C 2210	Large glazed element (frameless glazing)	
C 2252	Exterior door (PVC)	
C 2253	Exterior door (PVC-metal)	
C 2254	Exterior door (wood)	
C 2270	Garage door	
C 2340	Plastered thermal insulation (outside)	
C 2360	Ventilated facade	
C 2400	Exterior shutter	
C 2420	Exterior roller shutter	
C 2440	Exterior slatted blind	
C 2450	Exterior canvas awning	



21 SECOND WORK	
C 2500 Metal works (lockwork, balustrade, safety protections, etc.)	
C 2520 Physical cylinder (layout plan)	
C 2560 Carpentry	
C 2600 Plastering	
C 2635 Fire shutter	
C 2700 Cement screed	
C 2750 Paint	
C 2758 Enameling of sanitary ware and others	
C 2760 Tiled and earthenware covering	
C 2772 Parquet covering	
C 2780 Carpet covering	
C 2810 Laminate covering	
C 2820 Seamless coating, epoxy resin, polyurethane	
C 2880 Building cleaning	
C 2900 Landscaper (landscaping)	

3 INSTALLATIONS		LOCATION, ELEMENTS, SPECIFICATIONS
30 ELECTRICITY		
C 3010	Electrical Installation	
C 3055	Computer network	
C 3090	ITTO control (checking the electrical installation)	
32 HVAC (HEATING, VENTILATION, AIR CONDITIONING, REFRIGERATION)		
C 3310	Heating installation	
C 3320	Heat pump (aerothermal)	
C 3322	Heat pump (geothermal)	
C 3330	Wood boiler (wood, pellets...)	
C 3332	Gas boiler	
C 3334	Oil boiler	
C 3350	Installation of thermal panels	
C 3410	Ventilation installation	
35 SANITARY		
C 3510	Health facility	
C 3540	Drinking water treatment	
C 3610	Gas installation	
37 KITCHEN		
C 3710	Kitchen layout	
38 TRANSPORT FACILITIES		
C 3810	Elevator	
4 SPECIFIC INSTALLATIONS		LOCATION, ELEMENTS, SPECIFICATIONS
41 FIRE PROTECTION		
C 4110	Smoke outlet	
C 4120	Fire detection device	
C 4130	Fire safety signage	
42 SECURITY		
C 4210	Security device (camera, alarm...)	
44 FIREPLACES, STOVES, OVENS		
C 4400	Smoke pipe	
C 4410	Wood fireplace	
C 4420	Ambient fireplace (non-heating, 3d water vapor)	
C 4430	Wood stove	
45 WELL-BEING		
C 4510	Pool	
C 4520	Jacuzzi	

5 EQUIPMENT		LOCATION, ELEMENTS, SPECIFICATIONS
50 BUILDING		
C 5010	Home appliance	
C 5020	Extinguisher	
C 5099	PC Shelter Equipment	
55 LANDSCAPING		
C 5510	Automatic watering	
C 5520	Robotic garden equipment	
C 5560	Pergola	
59 OTHERS		
C 5910		
6 FURNISHING AND DECORATION		LOCATION, ELEMENTS, SPECIFICATIONS
60 FLUENT		
C 6040	Lamp	
C 6070	Interior blind	
69 OTHERS		
C 6910		
7 MANAGEMENT (FEES AND MANAGEMENT EXPENSES)		LOCATION, ELEMENTS, SPECIFICATIONS
70 MASTER OF WORK		
M 7010	Architect	
M 7050	Director of works (DW)	
72 ENGINEERS		
M 7210	Civil engineer	
74 SPECIALISTS		
M 7430	Building physicist (energy balance)	
M 7432	Asbestos diagnosis	
78 PRINCIPALS		
M 7820	Project owner (PO)	
M 7825	Project owner's representative (POR)	
M 7850	Management, real estate management	
M 7855	PPE Administrator	
8 SECONDARY COSTS		LOCATION, ELEMENTS, SPECIFICATIONS
Mt 8990	Concierge Services	
Mt 8998	Chimney sweep	

0 cm

5 cm

10 cm

15 cm

20 cm

25 cm