Canadian modular project brief workbook

A practical starting point for commercial, workforce, community and multi-family modular projects.

> **Early-planning resource:** This workbook helps organize questions and responsibilities. It does not replace project-specific advice from the owner, authority having jurisdiction or qualified professionals, and it does not determine price, schedule, feasibility or approval.

How to use this workbook

1. Complete what is known.

2. Mark unknown items explicitly.

3. Compare scope, not just totals.

4. Update decisions and sources.

Example entry

Intended use: “Approximate 40-person administrative office with reception, meeting rooms, staff amenities and accessible washrooms.”

Status: In progress **Owner:** Project lead **Source:** Internal space-program draft, version 2.

Project context

Project context planning fields

Field	Planning question	Your answer or source
Project name	What working name should everyone use for this project?	
Owner organization	Which organization owns or sponsors the project?	
Primary project lead	Who coordinates decisions, documents and questions?	
Decision stage	Is the project at feasibility, budgeting, design, procurement or delivery?	
Procurement route	What procurement method or approval process is expected?	

Building program

Building program planning fields

Field	Planning question	Your answer or source
Intended use	What must the building enable people to do?	

Field	Planning question	Your answer or source
Peak occupancy	How many occupants, staff, residents or visitors must it support?	
Space schedule	Which rooms, support spaces and adjacencies are required?	
Number of buildings	How many buildings or phases are being considered?	
Accessibility	Which accessibility requirements or owner standards must be addressed?	
Future change	Could the building expand, relocate or change use later?	

Site readiness

Site readiness planning fields

Field	Planning question	Your answer or source
Project location	What is the site address, legal description or map location?	
Land and zoning status	Is site control established, and what land-use approvals are known?	
Available site information	Which surveys, geotechnical information, site plans or utility records exist?	
Foundation approach	What foundation, pad or support assumptions are being evaluated?	
Delivery access	What road widths, turns, bridges, grades, overhead constraints or seasonal limits matter?	
Staging and lifting	Where could modules be staged, lifted and installed safely?	
Water	What water source and connection information is known?	
Wastewater	What municipal, septic or holding solution is known or still to be determined?	
Power and communications	What electrical capacity, generation and communications services are available?	

Codes and standards

Codes and standards planning fields

Field	Planning question	Your answer or source
Authority having jurisdiction	Which municipality, regional authority or other body reviews the project?	

Field	Planning question	Your answer or source
Applicable requirements	Which code edition, occupancy, fire/life-safety and energy requirements are known?	
Owner and procurement standards	Which accessibility, material, certification, inspection or procurement standards apply?	

Schedule

Schedule planning fields

Field	Planning question	Your answer or source
Target operating date	When must the building be ready for its intended use?	
Approval milestones	Which funding, design, permit, tender or board dates control the schedule?	
Site-work window	When can foundations, services, access and other enabling work occur?	

Commercial

Commercial planning fields

Field	Planning question	Your answer or source
Budget range	What budget range or funding ceiling is available, if known?	
Quote basis	Which inclusions, exclusions, allowances and alternates must suppliers identify?	
Evaluation criteria	How will price, scope, schedule, experience and other factors be evaluated?	

Documents

Documents planning fields

Field	Planning question	Your answer or source
Available documents	List plans, photos, reports, standards, reference designs and other source documents.	

Scope comparison

Record how each supplier treats a work package. “Included” should still be checked against drawings, specifications, exclusions and commercial terms.

Supplier scope comparison

Work package	Questions to resolve	Supplier response	Responsible party	Notes or source
Project management	Coordination, schedule, meetings, document control and reporting			
Architecture and building design	Layouts, elevations, room data and finish requirements			
Structural engineering	Building structure and identified design criteria			
Mechanical systems	Heating, ventilation, plumbing and controls			
Electrical systems	Power, lighting, life-safety systems and communications pathways			
Code and accessibility review	Applicable code, occupancy, fire/life-safety and accessibility requirements			
Permits and submissions	Responsibility for applications, supporting documents, fees and responses			
Factory construction	Building shell, interior fit-out, fixtures and finishes			
Factory inspection and records	Required inspection, certification and closeout records			
Foundation or support system	Design, supply, installation and tolerances			
Civil and site preparation	Clearing, grading, drainage, roads, pads and reinstatement			
Water and wastewater	Source, storage, treatment, piping, connections and testing			
Electrical service	Utility coordination, generation, distribution, connection and testing			
Transport and route planning	Permits, route checks, escorts and delivery conditions			
Lifting and installation	Crane, rigging, staging, module setting and weather protection			
Site tie-ins and completion	Structural, envelope, mechanical, electrical and finish connections			

Work package	Questions to resolve	Supplier response	Responsible party	Notes or source
Testing and commissioning	System checks, deficiency process and acceptance records			
Occupancy and handover	Final inspections, manuals, training, keys and turnover documents			
Warranty and service	Warranty boundaries, response process and owner maintenance obligations			

Site readiness

Track evidence, responsibility and dependencies. An early answer can remain provisional until the relevant professional or authority confirms it.

Site readiness tracker

Readiness item	Evidence or question	Status	Responsible party	Dependency or source
Site control	Confirm property access, boundaries and owner authorization			
Land-use review	Identify known zoning, development and environmental requirements			
Survey information	Confirm available legal, topographic and site survey information			
Ground information	Identify available geotechnical or bearing information			
Delivery route	Review road widths, turns, bridges, grades, clearances and seasonal restrictions			
Site entrance	Confirm delivery access, traffic control and restoration needs			
Staging area	Identify space for modules, crane, rigging and construction activity			
Foundation	Confirm design responsibility, construction sequence and readiness criteria			
Water	Confirm source, capacity, connection point and testing responsibility			
Wastewater	Confirm disposal approach, capacity, approvals and connection point			
Power	Confirm source, capacity, utility lead time and temporary power needs			
Communications	Confirm service availability, pathways and owner equipment			
Drainage and grading	Confirm finished elevations, drainage and erosion-control needs			
Permits and inspections	List approvals, reviewers, submission owners and target dates			
Weather and seasonal plan	Identify freeze-up, thaw, fire season or other access constraints			
Handover readiness	Confirm testing, occupancy, training and document requirements			

Decision log

Record what changed, who owns the decision, and what document supports it. Add rows as needed in the Excel workbook.

Project decision log

Date	Decision or question	Owner	Reason or source	Effect or follow-up

Prepared by Herauf Modular as a neutral planning aid. Visit https://heraufmodular.com/commercial-project-checklist for the current workbook and project-planning resources.