*4.K.2. Design Report Summary – Template Instructions*

*Revised 2/2/2022*

* *The purpose of the template shown below is to provide the AE an outline of the required format for the Design Report Summary. Refer to the DFD Policy and Procedure Manual for additional information.*
* *The Design Report Summary should not include a table of contents of the Appendix or any reference to the Appendix.*
* *All text shall be black 10-point Arial font for general information. “DESIGN REPORT” shall be black 14-point Arial font.*
* *Delete all instructional red text when finished editing. Delete Template Instructions page. Text in black Arial font must appear on final document unless otherwise noted.*
* *Delete unused space between paragraphs to provide a uniform formatted document.*
* *Project Title****:*** *This will generally be comprised of three lines (each as shown in WisBuild): Project Name, Building Name/Institution, and Name of City or Township. If the project has been enumerated, match the title shown on the enumeration documentation.*
* *Capitalize the first letter of each word (not all capital letters) for dates, titles and names.*
* *Type of Project: Select the single most relevant project description and delete the others.*
* *Project Description: Briefly describe the project’s general features. Include type of construction, materials, and number of stories. Comments about any sustainable design and energy conserving features are appropriate. Do not provide a history of the institution, site or building/asset. Do not explain the reason for the project or justify the project. The description shall be clear and concise.*
* *Authorized Budget and Funding Source: DFD Project Manager shall work with their Budget Analyst to select and complete one of the four examples shown below to provide to the A/E team.*
* *Space Summary: For projects that involve construction or remodeling of floor space, space summary information must be included for the spaces located within the areas of construction (not the entire building). Building Efficiency = ASF/GSF. If there is 0 GSF, delete entirely.*
* *Schedule: Confirm the schedule is reasonable between the milestones shown. Example: There should be at least 2 months between the bid opening to the start of construction. Do not add milestones that are not shown.*
* *Budget Summary: Fill in the table within Word. Amounts shall be aligned to the right.*
* *Use whole dollar ($) amounts only, no cents. Round all amounts up to next $100.*
* *If an amount is $0, delete the line entirely. Do not use “N/A” or “Zero”.*
* *Keep the border/line above “Total Project Cost”.*
* *Delete the “As Enumerated” column if the project was not enumerated and realign table to consolidate.*
* *Do not add budget lines – fill in only the rows provided. Delete budget lines not used.*
* *Other Fees are defined in the DFD Policy and Procedure Manual and typically include costs that are not included in the Prime AE Contract as basic services, additional services or reimbursables.*
* *Additional Comments: Comment on any special or noteworthy features of the design or schedule. Identify any significant unresolved design or cost-related issues. (Historic Preservation, Environmental Impact, etc.)*
* *Filename of submitted and PM reviewed Design Report Summary on SharePoint is per the following example from Section 4.K.1 of the PPM.  01A1B‑00‑SD‑DRSummary (.pdf and .docx) and if applicable 01A1B‑00‑SD‑DRAppendix.pdf.*

**DESIGN REPORT DIVISION OF FACILITIES DEVELOPMENT**

 **101 East Wilson Street, 7th Floor**

 **Post Office Box 7866**

 **Madison, WI 53707**

Month Day, Year

Project Name

Building / Institution

City or Town **Project Number:** 00X0X

**For the:** State User Agency

**Project Manager:** DFD Project Manager’s Name

**Architect/Engineer:** Name of A/E Firm

A/E’s City, State

A/E’s Telephone Number

**Type of Project:**

Major Project / New Construction / Remodeling / Maintenance / Energy / Health & Safety

(See instructions above for more information)

1. **Project Description:**

Insert Project Description. (See instructions above for more information)

1. **Authorized Budget and Funding Source:**

Enumerated Project with 1 Funding Source use:

“This project was enumerated in {Biennial budget years} Wisconsin Act {Act #} for {Enumeration Amount} {Fund source name}.”

Enumerated Project with Multiple Funding Sources use:

“This project was enumerated in {Biennial budget years} Wisconsin Act {Act #}. The enumerated amount for this project is {Enumeration amount}. The project is funded by {Amount} {Fund source name}, {Repeat formatting for all fund sources}.”

Categorical Enumerations use:

“This project was enumerated in the {Biennial budget years} Wisconsin Act {Act #} as part of {Categorical enumeration title} for {Amount} {Fund source name}.”

All Agency Projects use:

“This All Agency project is funded with {Amount} {Fund source - BTF or Agency Cash} for initial planning purposes.”

1. **Space Summary:** (See instructions above for more information)

Gross Area: \_\_\_\_\_GSF Assignable Area: \_\_\_\_\_ASF Building Efficiency: \_\_\_\_%

1. **Schedule:** (See instructions above for more information)

Submission of Documents for Final Review: Month Year

Bid Opening: Month Year

Start of Construction: Month Year

Substantial Completion / Occupancy: Month Year

1. **Budget Summary:** (See instructions above for more information)

|  |  |  |
| --- | --- | --- |
|  | **As Enumerated** | **Per Design** |
|  |  |  |
| Construction | $ | $ |
| A/E Fees | $ | $ |
| DFD Mgmt | $ | $ |
| Contingency | $ | $ |
| Equipment | $ | $ |
| Other Fees | $ | $ |
| **Total Project Cost** | $ | $ |
|  |  |  |
| Constr. Cost / GSF | $ | $ |
| Total Cost / GSF | $ | $ |

**Budget Notes:**

If “Other Fees” is used, list items included in “Other Fees”. Delete entirely if not used.

(See instructions above for more information)

1. **Additional Comments:**

Insert additional comments if applicable. Delete 6. entirely if not used.

(See instructions above for more information)