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 ©	PROJECT DESIGN GUIDES	<b>A00</b>
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# PROJECT DESIGN GUIDE A00 'CONSULTANT APPOINTMENT STRATEGY & CAM'

Project Name: <b><i>Name</i></b>	Project No.: <b><i>Number</i></b>	Date: <b><i>Date</i></b>
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**A** – Action  
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*DRAFT***The series of Design Management Guides currently includes:****CONTRACT**

- PROJECT DESIGN GUIDE A00 'CONSULTANT APPOINTMENT STRATEGY AND CAM'
- PROJECT DESIGN GUIDE A00.1 'COMPETENCE STATEMENT AND ASSESSMENT'
- PROJECT DESIGN GUIDE A01 'SCHEDULE OF SERVICES (SOS)'
- PROJECT DESIGN GUIDE A02 'DESIGN RESPONSIBILITY MATRIX (DRM)'
- PROJECT DESIGN GUIDE A03 'DESIGN PROGRAMME & DELIVERABLES'
- PROJECT DESIGN GUIDE A04 'DESIGN REVIEW & AUTHORITY PLAN'
- PROJECT DESIGN GUIDE A05 'PROJECT QUALITY PLAN (PQP)'
- PROJECT DESIGN GUIDE A06 'CONTRACT SCHEDULES & DESIGN PROCESSES'

**DEVELOPMENT & DELIVERY**

- PROJECT DESIGN GUIDE D01 'DESIGN DASHBOARD'
- PROJECT DESIGN GUIDE D02 'COMMUNICATIONS PLAN'
- PROJECT DESIGN GUIDE D03 'DESIGN INFORMATION FLOW MAPPING'
- PROJECT DESIGN GUIDE D04 'DOCUMENT PROTOCOLS'
- PROJECT DESIGN GUIDE D05 [spare / BIM](#)
- PROJECT DESIGN GUIDE D06 'RFI PROCEDURES'
- PROJECT DESIGN GUIDE D07 'CHANGE CONTROL PROCEDURE'
- PROJECT DESIGN GUIDE D08 'QUALITY CONFORMANCE'
- PROJECT DESIGN GUIDE D09 [spare](#)
- PROJECT DESIGN GUIDE D10 [spare](#)

**LEAD**

- PROJECT DESIGN GUIDE L01 'DESIGN MANAGEMENT AUDIT'
- PROJECT DESIGN GUIDE L02 'CONSULTANT PERFORMANCE REVIEW & TREND'

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## 1.0 Introduction

There are a number of key considerations when choosing consultants, individually and as a team. The following are some of the main criteria, they are in no specific order, as the priority of criteria will change from sector to sector and project to project. Getting the consultants appointments right is a key success factor in its own right.

The consultant appointment strategy is directly linked to the procurement route. The choice of consultant may be defined by a novation agreement. When novation is desired by the client, but the consultant/s in question are not seen as appropriate by the Contractor, negotiation should not be discounted. Three main outcomes are possible; i) persuade the client not to enforce novation, ii) the client may agree to the Contractor appointing the same consultant/s under their own bespoke agreements, iii) the Contractor may have to consider bolstering the consultant team with their preferred consultants (it should be noted, this can cause teamwork issues and needs careful handling!).

## 2.0 Key Considerations

### 2.1 CDM

Competence and a competence assessment check is a fundamental regulatory requirement for all qualifying projects. Refer to PDG A00.1.

### 2.2 Design or Delivery

This is a case of horses for courses; when starting a project from RIBA stages A-C, it is about understanding the brief and if there is a need to employ consultants strong on concept. If the project is won from stage D/E, strong on delivery will probably be the priority.

### 2.3 Stakeholder relationships

Stakeholder relationships should be mapped out, tracked and updated on a regular basis. Initial considerations may include:

- The client;
- Relevant local Authority Planning department;
- Design Council CABE;
- English Heritage;
- Framework suppliers;
- Etc.

Sound pre-existing stakeholder relationships can influence project outcomes for the benefit of all, where past project success is known and trust has been gained. This may favour designers with particular regional or international strengths.

### 2.4 Best fit

Preferred consultants (those with an outstanding track record) and those on Frameworks (e.g. P21) who have an understanding of the Contractors corporate structure and strategy are usually best placed to undertake the design in line with the Contractors requirements.

Knowledge of the following will benefit the efficiency of the project:

- A knowledge of the Contractors H&S policy;
- A knowledge of the Contractors Environmental policy;
- Understanding the Contractors pricing and proposals departments;
- Contractors protocols for BIM and/or CAD (and alignment of all software);
- Understanding of the Contractors preferred methods of construction (especially with DfMA/MMC);
- Contractor supply chain, especially if they are internal group companies, sub-contractors and suppliers.

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Where potential consultants are identified and are not known to the Contractor an interview and capability Statement will be required to be supplied, evaluated inline with ISO9001.

## **2.5 Design Team Structure**

This comes down to two basic models, single source for all/most disciplines, or multiple source (to include existing working relationships). A single point of contact can be beneficial in managing a design team. This must be weighed up against the strengths of the individual disciplines within a consultancy and the complexity and/or need for specialism in the project. Careful consideration should be given to which discipline should (usually the Architect) lead the design team and does the individual responsible have the skills to do so. This needs to be fully mapped out, later in the project process, in a Communications Plan, refer to PDG D02.

## **2.6 Fees and Competitiveness**

This is not solely down to lowest fee. Advantages can be gained from risk sharing during bidding stages, as is common-place on PFI projects, with bonus payments on a successful outcome. Strong commercial awareness, especially when dealing with client changes is an advantage. Ensure fees to stages are apportioned reasonably.

## **3.0 CAM**

It is fundamental to ensure the project design scope is covered and accounted for (fees), to aid this the Consultant Appointment Matrix (CAM) should be completed. This may be a 2 stage process, to ensure it is undertaken rigorously. The second stage to be undertaken in conjunction with the principles for the main consultancies; Architecture, Structures, Building Services, others as required. Refer to A00, appendix A.

## **4.0 Evaluation Process**

An evaluation process should take place based on a balanced scorecard where appropriate, weighting against each criteria etc. Choice of Consultant attributes, team strengths, identifying key personnel, commercial arrangements, resource availability and commitment, capability and any matters of concern / weakness that may need to be addressed going forward. This is to form the basis for assessment of competence (CDM) and proof that it has been discharged.

Names and roles of Contractor group team that have been engaged in the process are to be clearly recorded, and how consultation internally has been directed and managed in order to arrive at the correct choices.

## **Conclusions / Recommendation**

Describing the results and interpretation of scoring are to be clearly recorded. Comment on what level the 'pass' threshold was set at, whether any of the candidates were able to meet the threshold and if so the basis of the recommendation using the scorecard to support the proposal.

## **5.0 Managing this document**

The CAM, appendix A, is to be updated with each new appointment until all consultants have been appointed.

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**Appendix A – CAM**

Amend to be project specific