



PROJECT DESIGN GUIDE A00.a

Appendix A - Consultant Appointment Matrix

Project Name:	Project No.:	Date:
<i>Name</i>	<i>Number</i>	<i>Date</i>

SPECIFIC NOTES (relating to any particular project specific matters)

R01 - Alpha codes updated, Graphics updated.

FOR Consultant AGREEMENT
FOR Internal AGREEMENT

ALL SCHEDULES TO BE AGREED BY MAIN CONTRACT DATE: ??.??.2014

Rev.: x
Date:

ref.	CONSULTANT	Form of appointment	Client - Financial Close Contractor Responsibility							Pre-appointment							Appointment Schedules required by Contractor tbc in discussion with consultants															Rev.
			RIBA Stage 1	RIBA Stage 2	RIBA Stage 3	RIBA Stage 4	RIBA Stage 5	RIBA Stage 6	RIBA Stage 7	Competency statement	Verification of Competency	Contractors H&S Standards for Consultants and Designers	Contractors H&S Policy revised May 20??	Contractors Environmental Policy revised May 20??	Contractors Quality Policy revised 20??	Sch. 1 Team Structure	Sch. 2 Resources Profiles	Sch. 3 Schedule of Services	Sch. 4 Design Responsibility Matrix	Sch. 5 Stage 1-2 Deliverables	Sch. 6 Stage 3 Deliverables	Sch. 7 Stage 4 Deliverables	Sch. 9 Design Programme	Sch. 10 Information Release Dates	Sch. 11 Activity schedule (Fees)	Sch. 12 Collateral Warranties	Sch. 13 Pre tender H&S plan	Sch. 14 Project Brief	Sch. 15 Client Design Guide			
1.00:	Architect:																															
1.01:	DQI Consultant																															
1.02:	Town Planning:																															
1.03:	Fire Consultant:																															
1.04:	Acoustic & Vibration Consultant:																															
1.05:	Landscape Design:																															
1.06:	Structural & Civil Engineer:																															
1.07:	Transport and Waste:																															
1.08:	ME&Ph Engineer:																															
1.09:	BREEAM:																															
1.10:	Access (DDA) Consultant:																															
1.11:	CDM / Risk Register:																															
1.12:	Building Control:																															
1.13:	Section 20:																															
1.14:	Party Wall & Rights of Light:																															
1.15:	Archaeological Consultant:																															
1.16:	Geotechnical Consultant:																															
1.17:	Flood Risk Consultant:																															
1.18:	Daylight Factors:																															
1.19:	UXO:																															
1.20:	Site Survey (Existing Structures & Buildings / Asbestos / Topographical / etc):																															
1.21:	Air Test:																															
1.22:	Environment & Ecology Consultant:																															
1.23:	Lift Consultant:																															
1.24:	Interior & Space Planning Design:																															
1.25:	Signage / Wayfinding / Human Engineering																															
1.26:	FF&E																															
1.27:	Façade Consultant:																															
1.28:	Project Management:																															
1.29:	Security Consultant / SbyD:																															
1.30:	Design Auditor:																															
1.31:	Client Quantity Surveyor:																															

NOTES:
i) Choose schedules as appropriate to specific projects.
ii) Mandatory schedules - 1, 3, 4, 9, 11, 13 & 14.

Key:

	Agreed / Final draft to be agreed		Document created and issues for comment		Document has not been created		Not Applicable for Contractor
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CONTRACT SCHEDULE ROLL-OUT GUIDE

Stage 1-2 / ITCD		Stage 3 ITSFB	up to F.C.	Construction phase	Comments
Pre. 1	Competency statement	n/a	n/a	n/a	
Pre. 2	Verification of Competency	n/a	n/a	n/a	
Pre. 3	Contractors H&S Standards for Consultants and Designers	n/a	n/a	n/a	Company update only
Pre. 4	Contractors H&S Policy revised May 2007	n/a	n/a	n/a	Company update only
Pre. 5	Contractors Environmental Policy revised May 2007	n/a	n/a	n/a	Company update only
Pre. 6	Contractors Quality Policy revised 2007	n/a	n/a	n/a	Company update only
Sch. 1	Team Structure	rev. A	rev. B	rev. C	
Sch. 2	Resources Profiles	rev. A	rev. B	rev. C	
Sch. 3	Schedule of Services	rev. A	rev. B	as agreed	
Sch. 4	Design Responsibility Matrix	rev. A	rev. B	as agreed	Include DfMA & BIM
Sch. 5	Stage 1-2 Deliverables	n/a	n/a	n/a	
Sch. 6	n/a	Stage 3 Deliverables	n/a	n/a	Resolve at stage 2 is possible
Sch. 7	n/a	n/a	Stage 4 Deliverables	n/a	Resolve at stage 2 is possible
Sch. 9	Design Programme	rev. A	rev. B	as agreed	Effectuated by Change Control
Sch. 10	Information Release Dates	rev. A	rev. B	as agreed	Effectuated by Change Control
Sch. 11	Activity schedule / Fees & Draw-down schedule	as agreed	as agreed	as agreed	Effectuated by Change Control
Sch. 12	Collateral Warranties	n/a	n/a	n/a	
Sch. 13	Pre tender H&S plan	n/a	n/a	as agreed	
Sch. 14	Project Brief	rev. A	rev. B	as agreed	
Sch. 15	LEP Design Guide, including: Strategic Solutions - Design Guide for Schools Sustainability Guide BIM Strategic Level Protocol Statement Off-Site Solutions EPWMS	rev. A rev. A rev. A rev. A rev. A rev. A	rev. B rev. B rev. B rev. B rev. B rev. B	rev. B rev. B rev. B rev. B rev. B rev. B	Specific to BSF

COMPLIANCE AUTHORITY CHECK LIST

Planning Application Inclusions (Full)	BREEAM early items	Surveys	Other
Inc. 1 Planning statement	Ecology Assessment of the existing site	Land search	
Inc. 2 Design and Access statement	DQI's / Stakeholder engagement sessions and feed-back	Site Investigation Report	
Inc. 3 Secure by Design assessment	BREEAM AP	Measured Building Survey	
Inc. 4 Energy and Sustainability Statement	BREEAM Assessor	Existing Structures - materials (inc. Aesbestos)	
Inc. 5 Transport statement / Transport Impact statement	LZC and CHP Study	Existing Structures - structure (including foundation profiles)	
Inc. 6 Tree Survey / arboricultural implications	Flood Risk Assessment	Civils existing subbases	
Inc. 7 Protected Species survey and report	Background Noise Survey	Typographical	
Inc. 8 Heritage Statement inc. Archaeology assessment and sch'ed Ancient		Geotechnical Report	
Inc. 9 A Green Travel plan	BREEAM Stage 3 items	Environment (inc. Air Quality & Acoustics)	
Inc. 10 Flood Risk assessment	Secure by Design	Ecology (inc. TPO's & SSSI's)	
Inc. 11 Air Quality assessment		Flood Risk Report	
Inc. 12 Affordable Housing statement		Party Wall	
Inc. 13 Biodiversity survey and report		Rights of Light	
Inc. 14 Daylight/sunlight assesment		Archaeology	
Inc. 15 Environmental Impact assessment		UXO	
Inc. 16 Evidence to accompany applications for Town Centre uses		Wind modeling	
Inc. 17 Existing and proposed car parking and access arrangements			
Inc. 18 Land Contamination assessment			
Inc. 19 Lighting assessment (security and overspill)			
Inc. 20 Open Space assessment			
Inc. 21 Site Waste management statement			
Inc. 22 Sustainable Urban Drainage (SUDs)			
Inc. 23 Construction management plan			
Inc. 24 Acoustic performance of habitable rooms			
Inc. 25 other ?			