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PROJECT DESIGN GUIDE A01 'SCHEDULE OF SERVICES (SOS)'

Project Name: <i>Name</i>	Project No.: <i>Number</i>	Date: <i>Date</i>
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A – Action

I – Information

1.0 Introduction

The SoS is one of the fundamental and mandatory core documents to be appended to consultants appointments. The purpose of this document is to provide a definition of the extent of the scope of service/duties to be provided by the consultant throughout the project life cycle. [Where the consultant appointment is being made under the terms of the NEC/Professional Service Contract it is to be used in conjunction with Appendix 1 to the Schedule to the Agreement. In order to allow the services to be defined under the terms of the PSC, this comparative schedule is to serve as a 'menu' against those services applicable to the appropriate Section defined in the Schedule to the Agreement.](#)

The Employer should define the role of the Lead Consultant within the Design Team so that there is clarity of this role. This document is to be read in conjunction with the Design Responsibility Matrix (DRM) which is to be agreed between Employer and the Consultants to set out the responsibilities of each Consultant in respect of the construction elements or scope of the project.

2.0 Definitions used in the SoS

All reference to the **Employer** in this scope should be read as being the Main Contractor. The Original Client employing the Main Contractor is referred to in this document as **Client**. All references to the Project Manager have been deleted and replaced with Employer, again referring to the Main Contractor. This may need to be changed depending on the project specific procurement route.

The following definitions apply for the purposes of this document:

- Client's Requirements - any documents prepared by or on behalf of the Client by a party other than the Employer and provided to the Employer setting out his design requirements for the Project;
- Contractor - Specialist Trade Contractor or other Sub-Contractor to the Main Contractor normally with design responsibility;
- CDM - Construction Design and Management Regulations 2007;
- BIM - Building Information Management;
- EPWMS – Extranet Project Workflow Management System;
- DRM - Design Responsibilities Matrix.
- CDP – Contractor Design Portion

3.0 Additional Notes

- It MUST be agreed as a single version by all consultants where a multi appointment strategy is being rolled out.
- It MUST be reviewed and edited to be back to back with the main contract, to cover all client requirements.
- The services described in the SoS relate to any stage of work, i.e. RIBA 0-7 or other similar, and it is intended that projects will select the necessary services for each or any stage of works under consideration. Building Services Engineering responsibilities are to be read in conjunction with BSRIA Guide A Design Framework for Building Services BG6. Where these conflict BG6 is to take precedence.
- The wording 'if necessary' means as deemed necessary by the Employer unless expressly stated to the contrary.
- Where the term 'Consultant' is used this is to include other Consultants and any Sub-Consultants.

- It is a document to be edited (columns) in line with the number of consultants. If say one multi-discipline practice was appointed, only one column would be required.
- Each Consultant is responsible for the co-ordination and integration of their own work into the design.
- Inclusion of line items and wording of, to be agreed with the authorised person (refer to PDG 05).
- Inclusion of line items and wording of, to be agreed with the consultants P.I. insurers.
- In Framework agreements the SoS may only need to be agreed once. The Contractor is to seek agreement from relevant authorised persons and P.I. insurers.
- 'X' inserted in the matrix means that the Consultant will have some involvement (i.e. Lead, coordinating, liaison or assist) as more particularly identified within the scope / DRM.
- Scopes of service/duties for CDM Coordinator are not included on this schedule.
- Refer to appendix A of PDG A01 for the Master document.

4.0 Managing this document

Once the SoS has been completed and agreed by all parties, it is to become an appointment contract schedule. There should be no need for it to be amended or updated.