

PDGPROJECT
DESIGN
GUIDES**A01.a**

PROJECT DESIGN GUIDE A01.a

Appendix A - Schedule of Services

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

SPECIFIC NOTES (relating to any particular project specific matters)

To be read in conjunction with the SoS guide.
Revisions:
R01: Graphics to front page, references to BIM added 6.22, 5.16 & 5.17 added, few other minor updates.

Ref.	Service	Sub Ref.	Duties	Lead Design Consultant	Architect	Cost Consultant	Structural Engineer	Building Services Engineer	Civil Engineer	Landscape Architect	[Acoustic]	[Fire]	[Other e.g. Specialist including Interior Design]
0.00			GENERAL	ARC	ARC	COS	STR	SER	CIV	LAN	ACO	FIR	OTH
0.01	Lead Consultant (Ex RIBA)		<p>a. Leads and co-ordinates preparation of a project quality plan, and work stage programmes, including work outstanding from previous stages.</p> <p>b. Directs the work of the design consultants.</p> <p>c. Reviews the progress of design work in conjunction with the Lead Designer and CDM Coordinator.</p> <p>d. Facilitates communications between the Employer and design consultants.</p> <p>e. Advises on the need for and the scope of services by consultants, specialists, sub-contractors or suppliers.</p> <p>f. Receives regular status reports from each design consultant.</p> <p>g. Develops and manages change control procedures, and makes or obtains decisions necessary for time and cost control.</p> <p>h. Reports to the Employer at regular intervals on progress, to obtain further instructions or approval to proceed.</p>	X									
0.02	Lead Designer		<p>a. Directs the design process.</p> <p>b. Coordinates preparation of work stage programme(s) for the design process.</p> <p>c. Coordinates design of all constructional elements, including work by consultant specialists or suppliers and for health and safety matters in conjunction with the CDM Coordinator.</p> <p>d. Establishes the form and content of design outputs, their interfaces and a verification procedure.</p> <p>e. Communicates with the Employer on significant design issues.</p>	X	X		X	X					
0.03	Third Party coordination		Coordinate all consultation with third parties that relates to the design of the Development.	X	X		X	X	X	X	X	X	X
0.04	Design Responsibilities Matrix (DRM)		See that the preparation and completion of the DRM is done to the satisfaction of all parties	X	X	X	X	X	X	X	X	X	X
0.05	Deliverables Schedules		Provide a schedule of all items to be issued, for all stages and statuses (i.e. Planning, For Tender, For Approval, For Construction). All items are to be uploaded on to the EPWMS, at the project stage agreed with the employer.	X	X	X	X	X	X	X	X	X	X
0.06	Package Schedules		Package schedules are to be provided or assigned to information on the EPWMS, for all packages as defined by the employer.	X	X	X	X	X	X	X	X	X	X
1.00			SURVEYS										

Ref.	Service	Sub Ref.	Duties	Lead Design Consultant	Architect	Cost Consultant	Structural Engineer	Building Services Engineer	Civil Engineer	Landscape Architect	[Acoustic]	[Fire]	[Other e.g. Specialist including Interior Design]
1.01	Models		See that models are prepared for items such as Thermal, Wind and Acoustic and take receipt of results and coordinate into the design.	X	X		X	X	X	X			
1.02	Surveys	a	See that land, below ground (including services), existing structures and environment surveys are carried out;	X	X		X		X		X		
		b	Take receipt of all reports and assess implications, interpret results and see that findings are reviewed and incorporated in compliance with the brief;	X	X	X	X	X	X	X	X	X	X
		c	Consult as necessary with any local or other authority on matters relating to the proposed works;	X	X		X	X	X				
		d	Assist the Employer to arrange for any necessary further investigation or surveys to be undertaken.	X	X		X	X	X				
1.03	Inspect the site	a	Visit the Site and carry out an initial appraisal, having studied all available data, information and reports relating to the Project, carry out inspection of the site and subsequently.	X	X	X	X	X	X	X	X	X	X
		b	Advise on the effect of any physical site restrictions, which may effect design options.	X	X		X	X	X	X	X	X	X
1.04	Independent Design checks		Carry out independent checking of designs prepared by Contractors.		X		X	X	X		X	X	
1.05	Condition Schedule		Obtain from the Employer (or elsewhere) information concerning ownership of the site of the Project and any lessors or lessees of the site, any existing buildings on or adjacent to the site, boundary fences, other enclosures and any known easements, encroachments, underground services, rights of way, rights of light, rights of support and all other relevant matters as required. Advise the Employer of any further information requires for the proper carrying out of the Services.	X	X								
2.00			HEALTH AND SAFETY AND ENVIRONMENT										
2.01	CDM 2007		Perform all the duties of a 'designer' under the Construction (Design and Management) Regulations 2007.	X	X	X	X	X	X	X	X	X	X
2.02	Competency Questionnaire		Complete the Employer's Design Competency Questionnaire and Health & Safety Standards for Consultants and Designers.	X	X	X	X	X	X	X	X	X	X
2.03	Record Drawings		Provide record drawings (defined as the last revision of a drawing marked up with any subsequent agreed changes in a form for incorporation in the Health and Safety File / O&M Manual).	X	X		X	X	X	X	X	X	X

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2.04	Safety policies		Assist the Employer to see that rigorous safety policies are in place and are implemented by the Contractors working on the site and that there is adequate protection for the public and others and that Health and Safety Statutory requirements or regulations are fully observed.	X	X	X	X	X	X	X	X	X	X
2.05	Operate and Maintain		Advise the Employer on the resources and skills required to operate and maintain the completed Works on the timing of their appointment or on the need for any maintenance agreements.	X	X		X	X	X	X			
2.06	Incident and Injury Free		Participate in and support the Employer's H&S initiatives and ensure attendance at H&S Inductions and courses as stipulated by the Employer.	X	X	X	X	X	X	X	X	X	X
5.00	Risk Assessment		Maintain and update design risk assessments or other design outputs as required to comply with the Construction Design and Management (CDM) Regulations 2007, having cognisance of construction methodology and logistics.	X	X	X	X	X	X	X	X	X	X
2.08	Environment		Understand the employers environmental policies and strategy. Implement environmental design solutions to meet or better project brief requirements.	X	X	X	X	X	X	X	X	X	X
3.00			DESIGN BRIEF										
3.01	Statement of Need	a	Ascertain the Employer's requirements for the Project including functional requirements, environmental standards, life span, levels of quality, space, intended use, timescale and financial limits, assess these and give general advice on how to proceed;	X	X	X	X	X	X	X	X	X	X
		b	Obtain Contract Data part 1 and produce Contract Data Part 2 (Data provided by the Employer and Data provided by the Consultant) (NEC Appointments).	X	X	X	X	X	X	X	X	X	X
3.02	Define objectives, constraints and criteria for development	a	In conjunction with the Employer develop the strategic brief for the Project, by engaging with all stakeholders through a collaborative process;	X	X	X	X	X	X				
		b	Co-ordinate site appraisals; investigations environmental and feasibility studies;	X									
		c	Provide broad guidelines on scheme affordability and other cost studies.	X		X							
3.03	Identify options		Carry out initial appraisal studies including any preliminary feasibility work, identify possible options and make recommendations to the Employer.	X	X	X	X	X	X				
3.04	Preliminary Cost Plan		Provide a preliminary cost plan for the Project in sufficient detail to assist the Employer and other members of the Project Team to develop their design within the overall approved cost limit. Provide benchmark measure against similar projects.	X		X							

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3.05	Investigate alternatives	a	Investigate the preferred alternatives in order to select the most suitable solution and prepare outline drawings and specifications to illustrate the proposals, together with any implications on programme and cost;	X	X	X	X	X	X	X	X	X	X
3.06	Commit to brief	a	Communicate the details of the agreed brief to all Consultants and see that the Consultants confirm in writing their commitment to that brief;	X									
		b	If this highlights the possibility of difficulty in implementing the brief, inform the Employer and take the necessary action to see that the difficulties are resolved.	X									
3.07	Report on difficulties in meeting brief		Where difficulties are highlighted during the design phase, which may not be capable of being resolved, and which may result in a failure to meet the Client's brief, submit a report to the Employer forthwith giving options and suggestions.	X	X	X	X	X	X	X	X	X	X
4.00			APPROVALS and COMPLIANCE										
4.01	Manage third party approvals		Manage the arrangements for obtaining all third party approvals including but not limited to local authorities, highways and boundary neighbour issues.	X									
4.02	Third Parties	a	With the approval of the Employer, arrange for any required submissions of designs, drawings, models, calculations or other material including a Fire Strategy to regulatory bodies and expedite any necessary approvals;	X	X		X	X	X	X	X	X	X
		b	See that the design complies with all Client and funders required design standards.	X	X	X	X	X	X	X	X	X	X
4.03	Liaise with statutory utilities		Liaise with statutory utilities on any upgrades, new supplies and diversions on and around the site including highways.	X			X	X	X				
4.04	Planning and/or Listed building submission and approval	a	Advise on the need for planning permission and/or status of planning application submitted by the Client and on any other statutory approvals that may be required;	X	X								
		b	Make all necessary submissions to Statutory Authorities and seek approvals;	X	X		X	X	X	X	X	X	X
		c	Thereafter undertake negotiations with the Planning and other Statutory Authorities as necessary to ensure approval of the planning conditions and other applications including undertaking any necessary amendments to the design submitted.	X	X		X	X	X	X	X	X	X
4.05	Planning enquiry		Where necessary act as a witness at any hearing or planning enquiry or the like.	X	X		X	X	X	X	X	X	X

Ref.	Service	Sub Ref.	Duties	Lead Design Consultant	Architect	Cost Consultant	Structural Engineer	Building Services Engineer	Civil Engineer	Landscape Architect	[Acoustic]	[Fire]	[Other e.g. Specialist including Interior Design]
4.06	Comply with statutory requirement	a	See that the designs for the Works fully comply with all Statutory requirements including, but not confined to requirements concerning Health and Safety, Planning, Fire, Building Control, highways and utilities adoption criteria e.g. Section 106 etc.,	X	X		X	X	X	X	X	X	X
		b	Make any necessary submissions, monitor progress and take any action necessary within the cost plan to ensure compliance and to rectify deficiencies to achieve compliance.	X	X		X	X	X	X	X	X	X
		c	Report progress to the Employer on a regular basis.	X	X	X	X	X	X	X	X	X	X
4.07	Planning conditions	a	In co-ordination with the other Consultants resolve all relevant outstanding conditions attached to the planning approval and advise the Employer of progress on a regular basis.	X	X		X	X	X	X	X	X	X
		b	Advise the Employer of any implications compliance with the conditions may have on the scheme and ensure any actions taken to resolve them are within the cost plan.	X	X		X	X	X	X	X	X	X
4.08	Approvals	a	Establish regular reporting procedures with the Employer and identify those matters, which require approval and where necessary,	X									
		b	Provide assistance to obtain those approvals.		X	X	X	X	X	X	X	X	X
4.09	Notice of approvals		Give the Employer sufficient notice of all approvals, decisions or other matters which require action by the Employer and, where appropriate assist the Employer by providing information and making recommendations.	X						X			
4.10	Advice on samples, models etc		Advise the Employer on any samples, models to be submitted to the Client (see also 5.14).	X	X	X	X	X	X	X	X	X	X
4.11	Advice on testing		Advise the Employer on any testing of components and materials and inspect workmanship.	X	X	X	X	X	X	X	X	X	X
4.12	Building regulations		Arrange the sign off of all Building Regulations queries and request letter of compliance from the Building Inspector.	X									
4.13	Statutory Certificates		See that all statutory Certificates and Approvals are given to the Employer.	X									
4.14	Other Design Standards		Ensure that the designs for the Works fully comply with all Client and funders required design standards, including but not limited to Sport England, Zuric or Premier Guarantee.	X	X	X	X	X	X	X	X	X	X

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4.15	Further Client Information		Prepare as necessary, drawings, information and surveys, for the use of the Client and for applications under planning, building act, building regulation or other statutory requirements, or for presentations to or negotiations with the Reversioner, adjoining owners, public authorities, licensing authorities, the Fund, the Purchaser, any Tenant or others. Prepare plans, where required, for conveyance, Land Registry and other legal purposes.	X	X	X	X	X	X	X	X	X	X
4.16	Approval to proceed		See that Employer Approval is obtained for each Phase of design development.	X	X	X	X	X	X	X	X	X	X
5.00			DESIGN INFORMATION										
5.01	Approval to proceed	a	Obtain the Employer's approval to proceed with the preparation of the design at each Phase;	X	X	X	X	X	X	X	X	X	X
	Stage Reports	b	In liaison with the other Consultants and in conjunction with the Employer, prepare Stage report and submit.	X	X	X	X	X	X	X	X	X	X
5.02	Design Execution Plan		Contribute to the production of the Employer's design execution plan.	X	X	X	X	X	X	X	X	X	X
5.03	Complete design from previous phase		Make all necessary amendments to confirm scheme compliance with latest incoming advice and feedback from previous phases/ stages.	X	X	X	X	X	X	X	X	X	X
5.04	Manage area schedules	a	Provide area schedules to suit all required standards of measurement including but not limited to GEA, GIA, NIA These areas are to be illustrated for specific (and most contentious) areas of the project and to take account of standard construction tolerances;		X								
		b	Review and update all areas at all stages of the project, taken as RIBA stages unless advised otherwise;		X								
		c	Review all areas when considering a potential design change;		X								
		d	Advise Employer on any compliance issues.	X	X								
5.05	Respond to queries	a	Lead the Design Team and co-ordinate a response to any Employer queries that may arise during any stage of the works;	X									
		b	In conjunction with the other Consultants, advise the Employer in response to technical queries raised and where necessary lead and coordinate the Consultants response and update and re-issue drawings and / or specifications accordingly for construction purposes;	X									
		c	Provide response to the Lead Consultant for any Employer queries raised during any stage of the works;		X	X	X	X	X	X	X	X	X
		d	Respond to technical queries raised and update and re-issue drawings and / or specifications accordingly for construction purposes.	X	X	X	X	X	X	X	X	X	X

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5.06	Review deliverables	a	Provide, agree and review with the Employer on a regular basis a deliverables schedule for work up to each relevant Stage, itemising each piece of design information to be submitted, the planned issue date, the drawing / specification number;	X	X	X	X	X	X	X	X	X	X
		b	List of all information required from other parties in order to finalise it.	X									
5.07	Manage production of design		Establish rigorous management procedures to monitor the production by Consultants of design information in order that any shortcomings may be promptly highlighted and rectified.	X									
5.08	Specification	a	Agree materials and construction specifications with the Consultants and the Employer;	X	X	X	X	X	X	X	X	X	X
		b	Prepare materials and construction specifications and keep the Employer fully informed.	X	X	X	X	X	X	X	X	X	X
5.09	Performance specified works (where applicable)		Prepare a detailed performance specification for the elements of the Project within the Consultant's discipline and co-ordinate the preparation of performance specifications by the Other Consultants for all elements of the Project, including specifications for materials, equipment and workmanship. See that detailed drawings, calculations and specifications prepared or to be prepared by the Other Consultants, the Contractor or Sub-Contractors are coordinated with the objectives and requirements of the overall performance specification.	X	X	X	X	X	X	X	X	X	X
5.10	Deleterious materials	a	See that the Consultants specifications prepared for the Works specifically exclude the use of materials accepted as being deleterious at the time, and;	X	X	X	X	X	X	X	X	X	X
		b	Subsequently within the scope of Consultant's inspection obligations see that such materials are not used in connection with the Works.	X	X	X	X	X	X	X	X	X	X
5.11	Develop scheme design		Develop a scheme design for the Project, for the approval of the Employer, from the outline proposals, taking into account amendments requested by the Employer and incorporating those elements designed by the Other Consultants. The scheme design will illustrate the size and character of the Project in sufficient detail to enable the Employer to agree spatial dimensions and arrangements, materials and appearance and it will include a detailed description of the Project in the form of an outline descriptive specification.	X	X	X	X	X	X	X	X	X	X
5.12	Develop detailed design	a	Develop detailed design from the approved design in the Employers Requirements and in full coordination with the other Consultants, Contractors and suppliers as reasonably required by the Employer;	X	X	X	X	X	X	X	X	X	X
		b	Prepare Production Information for formal issue to the Employer in accordance with the Construction Programme current at that time and within the Cost Plan.	X	X	X	X	X	X	X	X	X	X

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5.13	Prepare Production information	a	Prepare Production Information of sufficient detail for construction purposes and in full coordination with the other Consultants and Contractors as reasonably required by the Employer. Production Information to include but not be limited to fully dimensioned and detailed drawings, specifications [in NBS format], schedules, descriptions of materials and finishes, workmanship and quality standards;	X	X	X	X	X	X	X	X	X	X
		b	In coordination with the other consultants and specialist subcontractors prepare as required by the Employer all further designs, specifications and drawings, including bar bending schedules for the information of the Employer in sufficient detail for construction purposes.	X	X	X	X	X	X	X	X	X	X
5.14	Models, mock ups and prototypes		Provide design information for construction of prototypes, mock-ups or models as required by the Employer.	X	X	X	X	X	X	X	X	X	X
5.15	Incorporate response to queries	a	In conjunction with the other Consultants, advise the Employer in response to technical queries raised and where necessary lead and coordinate the Consultants response and update and re-issue drawings and / or specifications accordingly for construction purposes;	X	X	X	X	X	X	X	X	X	X
		b	Respond to technical queries raised and update and re-issue drawings and / or specifications accordingly for construction purposes.	X	X	X	X	X	X	X	X	X	X
5.16	Design Protocols		All design information is to be fully compliant with all the Clients relevant protocols.	X	X		X	X		X	X	X	X
5.17	Certificates of Compliance		Certificates of Compliance (CoC) are to be issued to the Client and Employer with original signatures by authorised personnel for all stages of the project in accordance with the Clients protocols.	X	X		X	X		X	X	X	X
		a	Consultants are to ensure sub-consultants design information is subject to a CoC and to be issued to the Client and Employer with original signatures by authorised personnel for all stages of the project in accordance with the Clients protocols.	X	X		X	X		X	X	X	X
6.00			COOPERATION, COLLABORATION, COMMUNICATION and COORDINATION										
6.01	Public relations		Undertake necessary preparations and attendance at any briefing or public relation meetings.	X	X		X	X	X	X			
6.02	Sub consultants		Employ any sub consultants necessary to execute the consultant duties and responsibilities.	X	X	X	X	X	X	X	X	X	X
6.03	Highways co-ordination		Liaise and co-ordinate the design of the works with all other consultants including the highways and infrastructure.	X	X	X	X	X	X	X	X	X	X

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6.04	Communication Plan		Assist in the development and production of the project Communication Plan and see that it is properly implemented with the other Consultants.	X									
6.05	Design reviews	a	Coordinate and lead the other Consultants in a full design review of the Client's requirements, budgets and timetable;	X									
		b	Report findings and suggestions to the Employer.	X									
6.06	Interfaces		Prepare details for coordination purposes at the interfaces between respective Contractors' designs and with the design carried out by the Consultant and other Consultants.	X	X	X	X	X	X	X	X	X	X
6.07	Appointment of other consultants	a	Make recommendations to the Employer on the need to appoint other Consultants and on the scope of their duties;	X									
		b	Subsequently assist the Employer in all matters leading to their appointment and;	X									
		c	Assist in preparing briefs covering the scope of the services for which they will be responsible;		X	X	X	X	X	X	X	X	X
		d	Fully integrate designs produced by other Consultants.		X	X	X	X	X	X	X	X	X
6.08	Co-ordination	a	Co-ordinate the views of Consultants in order to submit a detailed report to the Employer on the proposed scope of the Works together with a proposed programme for the completion of the Project and anticipated costs including reviewing alternative design and construction solutions and;	X		X							
		b	Provide estimates of the costs of those options as required, and;			X							
		c	Assist the Employer in reporting these matters to the Client.	X									
6.09	Neighbour properties	a	Assess the need to take action to protect the interests of the Employer in respect of neighbouring properties and;	X	X	X	X	X	X	X	X	X	X
		b	Accordingly make recommendations to the Employer.	X									
6.10	Integrate building services		Work closely with the Employer and the Project Team to see that the building services design is fully integrated with the overall design of the Project with the intent that the Works can be completed within the amount allocated for building services in the approved cost limit and within the programmed time.	X	X	X	X	X	X	X	X	X	X
6.11	Co-ordinate design		Lead the Design Team and co-ordinate spatially and technically all elements of the design including the work of other Consultants, Contractors and Suppliers and integrate into the overall design.	X									
6.12	Exchange of design information		Accept responsibility for seeing that the exchange of design or other information between the Consultants is satisfactory throughout the course of the Project.	X									

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6.13	Assist in client negotiations		Assist the Employer, lead and coordinate other designers, in any way that may reasonably be required in respect of negotiations with the Client after the submission of the tender and prior to the award of the contract.	X									
6.14	Liaison with Landlord, Funder, Operator, Tenant / End User	a	If requested by the Employer submit via the Employer plans to the Client for approval by Landlords, Funders, Tenants or others;	X									
		b	Provide plans for the approval of the above.		X	X	X	X	X	X	X	X	X
6.15	System for commenting on Contractors design		Use the employers system or if not in place, set up and maintain a system approved by the Employer for the commenting on of Contractors design for the purpose of coordination of the design and all parties' comments.	X									
6.16	Comment on suppliers information	a	Comment for the purposes of coordination and integration on Contractors and Suppliers submitted information (drawings, schedules, samples etc) and coordinate the responses of the other Consultants to the Employer and;	X									
		b	Integrate any issues arising with the design proposals;		X	X	X	X	X	X	X	X	X
		c	Comment on Contractors and Suppliers submitted information (drawings, schedules, samples etc).		X	X	X	X	X	X	X	X	X
6.17	Co-ordination of suppliers information	a	Review the Contractors and Suppliers drawings and details with particular reference to tolerances and dimensional and spatial coordination, interfaces, finish, durability, appearance and performance criteria (insofar as it relates to the Consultants profession);	X	X	X	X	X	X	X	X	X	X
		b	Report to Employer.	X									
6.18	Information checks and co-ordination	a	At all stages of Production Information check and coordinate the design work (insofar as it relates to the Consultants profession) produced by the Consultants and Contractors for compliance, through a rigorous checking procedure that has been approved by the Employer. Where any non conformance is identified either modify the design in order to achieve compliance and notify the Employer of all such changes, or seek the Employers instruction;	X	X	X	X	X	X	X	X	X	X
		b	Assist the Employer in notifying the Client of the implications of such changes and their impact upon the works as they occur.	X									
6.19	Record Information		Take receipt of record drawings, operating instructions and maintenance manuals prepared by or on behalf of the Employer and check adequacy and compliance with the contract requirements.	X									
6.20	Commissioning		Technical commissioning and handover - receive client briefing, input into technical commissioning team, collaborate in preparation of technical commissioning programme and provide the required input into inspection and testing.	X	X		X	X	X		X	X	X

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6.21	Post Contract		As instructed by the Employer participate in and assist in the development of the FM Strategy (see Section 8/9).	X	X		X	X	X		X		
6.22	BIM	a	Work collaboratively to agreed* BIM procedures and protocols, on a common platform** or one that provides interoperability.	X	X	X	X	X	X	X	X	X	X
		b	*Agreed between Client, Contractor, Designers, Sub-contractor Designers, Suppliers & others to be identified.	X	X	X	X	X	X	X	X	X	X
		c	**A common platform refers to software, Intranet or Extranet project management system and any other requirement needed to be common to all parties.	X	X	X	X	X	X	X	X	X	X
7.00			PROCUREMENT, PLANNING AND PROGRAMME										
7.01	Procurement Strategy	a	Assist the Employer to develop a project procurement plan and, following approval by the Employer, see that the design is developed within the approved cost budget;	X									
		b	See that the other Consultants comply with the plan and in the achievement of the cost budget;	X									
		c	Agree with the Employer which packages of information will be Consultant designed and which packages will have Contractor design input or for specialist suppliers to provide any materials or equipment and seek the Employer's approval and;	X	X		X	X	X				X
		d	In liaison with the other members of the Project Team, make suggestions to the Employer on the technical suitability of firms who may be invited to submit tenders for any specialist Works.	X	X	X	X	X	X	X	X	X	X
7.02	Assist pre-tender checks		Assist the Employer to see that a pre-tender cost check is prepared based on the tender documentation.	X	X	X	X	X	X	X	X	X	X
7.03	Recommend pre-order materials	a	Make recommendations to the Employer on the necessity for early work packages, long lead items and impact of off site manufacturing or assembly requirement;	X	X	X	X	X	X	X	X	X	X
		bincluding any arrangements for vesting in materials, plant.	X	X	X	X	X	X	X	X	X	X
7.04	Design for Procurement Information		Prepare design information of an appropriate and suitable level (e.g. RIBA Stage F) to enable the Employer to seek and obtain robust proposals by relevant package from the market.	X	X	X	X	X	X	X	X	X	X
7.05	Release of information		Discuss and agree with the Employer programme and activity schedules for the release of the information having regard to the provision of the design.	X	X	X	X	X	X	X	X	X	X

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7.06	Tendering Process	a	Assist the Employer to deal with all enquiries from the Contractors during the tendering periods and;	X	X	X	X	X	X	X	X	X	X
		b	See that any clarification on the content of the documentation provided to any tenderer is sent to all others;	X	X	X	X	X	X	X	X	X	X
		c	Attend and Participate in mid tender interviews.	X	X	X	X	X	X	X	X	X	X
7.07	Assist tender appraisals		Assist the Employer to carry out tender appraisals.	X	X	X	X	X	X	X	X	X	X
7.08	Examine tenders technical	a	Review tenders received for technical compliance and;	X	X	X	X	X	X	X	X	X	X
		b	In liaison with the other members of the Project Team, make suggestions to the Employer and advise on any corrective action which may be required if the lowest tender is higher than the approved cost limit for the Works and;	X	X	X	X	X	X	X	X	X	X
		c	Seek the Employer's instructions.	X									
7.09	Resource programme	a	Prepare and agree a resource loaded design programme for all phases of the design process on a package-by-package basis with the Employer;	X	X	X	X	X	X	X	X	X	X
		b	Incorporate the design programme requirements of the other Consultants and see that this is integrated with the Project Programme;	X									
		c	Incorporate the design programme requirements of Contractor and Supplier designs and see that this is integrated with the Project Programme.	X									
7.10	Detailed programme	a	In co-operation with other Consultants prepare a detailed programme or prepare sufficient information such that the Employer can prepare a detailed programme for the production of design information leading up to obtaining tenders for the Works and;	X	X	X	X	X	X	X	X	X	X
		b	Obtain the Consultants commitment to that programme in writing, and;	X									
		c	Provide a copy of the programme to the Employer.	X									
7.11	Design programme reports	a	Prepare a report showing the progress made against the agreed design programme;	X									
		b	Liaise with the Employer and other consultants in preparing a report showing the progress made against the agreed design programme and provide in the report either a) Confirmation that programme is being maintained, or b) Convene Early Warning meeting to record details of any shortfall and see that the measures are agreed to remedy the situation;		X	X	X	X	X	X	X	X	X
		c	Submit the report to the Employer at not more than monthly intervals or at such intervals as the Employer may instruct.	X									
7.12	Long Lead in Items		Advise the Employer in relation to the ordering of materials, plant and / or equipment with long lead in or delivery periods.		X	X	X	X	X	X	X	X	X

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8.00			ADMINISTRATION										
8.01	General Professional Indemnity Cover		The consultant must provide a level of Professional Indemnity Insurance to satisfy the requirements of Contract Data Part One or other specified project requirement.	X	X	X	X	X	X	X	X	X	X
8.02	Electronic information		The Consultant shall use a web based EPWMS tool as the primary means of communication on this project and the preferred tool is DOCUMENTUM . The use of the EPWMS will be governed by the Client/project protocols.	X	X	X	X	X	X	X	X	X	X
8.03	BIM - Building Information Management		The Consultant is to take account of and make provision for Contractors BIM Strategic Level Protocol Statement which is included in Appendix 5 to the appointment (NEC Appointments).	X	X	X	X	X	X	X	X	X	X
8.04	Attendance at meetings		Attend meetings as requested and required by the Employer including Collaboration Workshops and various meetings such as CDM, supply chain, design review, project managers, value, cost, risk, buildability, technical, progress, liaison meetings throughout the currency of the whole project from inception through to defect period.	X	X	X	X	X	X	X	X	X	X
8.05	Land Acquisition	a	Assist the Employer, if necessary and required, to select and procure the site on behalf of the Client and;	X	X	X							
		b	Assist the Employer to assess the implications of any constraints which may be attached to the site.	X	X	X	X	X	X	X	X	X	X
8.06	Agree Duties		Meet with the Employer and other members of the Project Team and see that the services listed in this schedule are fully co-ordinated with Services provided by the other Consultants and Contractors.	X	X	X	X	X	X	X	X	X	X
8.07	Design Team Meetings	a	Establish contact with Consultants following their appointment and arrange and chair regular meetings with them throughout the Project in order to review their input to the design process;	X									
		b	Prepare and circulate minutes of the meetings to the Employer and other Consultants.	X									
8.08	Correspondence		Copy all correspondence to the Employer unless instructed otherwise / in accordance with the communication plan.	X	X	X	X	X	X	X	X	X	X
8.09	Advise on quality		Advise the Employer on materials, workmanship and quality.	X	X		X	X	X	X	X	X	X

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8.10	Quality	a	The Consultant shall implement, a Quality Management System* ("QA System"). The Consultant shall review its QA System with the Employer, and shall demonstrate its ability to manage the quality of the Services in accordance with this system. * Quality Management System" is defined as "the system employed by the Consultant in carrying out the Services generally in accordance with British Standard EN ISO 9001;	X	X	X	X	X	X	X	X	X	X
		b	Provide access to the Employers as to undertake assessment or audit of the Consultant's Quality Management System.	X	X	X	X	X	X	X	X	X	X
8.11	Client completion reports		Assist the Employer to prepare a completion report to the Client including but not limited to matters relating to cost, programme, quality, health and safety, performance and operations.	X	X	X	X	X	X	X	X	X	X
9.00			RISK AND COST										
9.01	Cost advice		In discussion with the Employer provide such cost advice through studies as is necessary in order to assist the Employer to establish his brief (proposals) for the project and the financial limits.	X		X							
9.02	Risk Management		Undertake risk assessments in conjunction with the Employer, and contribute to the Employer's risk management process	X	X	X	X	X	X	X	X	X	X
9.03	Value management / value engineering		Undertake value management and value engineering exercises in conjunction with the Employer.	X	X	X	X	X	X	X	X	X	X
9.04	Advice on design development		Advise the Employer if any Design Development is likely to materially affect the cost or programme of the works throughout the design process	X	X	X	X	X	X	X	X	X	X
9.05	Re-evaluation of risk and Value		Participate in the Re-evaluation of the Risk and Value Management reviews	X	X	X	X	X	X	X	X	X	X
9.06	Life Cycle costing	a	Undertake life cycle costing and environmental assessment exercises in conjunction with the Employer and, Where this may result in the approved cost limit for the Project being exceeded inform the Employer of the cost and programme implications and;	X	X	X	X	X	X	X	X	X	X
		b	Seek the Employer's instructions.	X									
9.07	Assist in cost plan	a	Provide such assistance as the Employer may require in order to see that a cost plan is prepared for the Project, and see that the design information produced is adequate and of sufficient detail. Where this may result in the approved cost limit for the Project being exceeded inform the Employer of the cost and programme implications and;	X	X	X	X	X	X	X	X	X	X
		b	Prepare detailed cost plans in accordance with the Employers approved cost expenditure limits and distribute copies of the cost plan to all Consultants.			X							

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9.08	Assist in cost control	a	Assist the Employer to establish rigorous cost control procedures in order that designs are strictly monitored against the agreed cost plan and that any difficulties are rectified and the approved cost limit is maintained;	X	X	X	X	X	X	X	X	X	X
		b	Thereafter, monitor the development of the design against the cost plan and report any anticipated difficulty to the Employer including proposals for overcoming that difficulty and;			X							
		c	Seek the Employer's instructions in sufficient time to allow corrective action to be taken.	X									
9.09	Design to Cost / Budget		See that designs are developed, co-ordinated and tested to achieve agreed cost plan.	X	X	X	X	X	X	X	X	X	X
9.10	Exceeding Cost Plan		Revisit the design and prepare options in the event that the project exceeds the Cost Plan as outlined in the Employers Proposals.	X	X	X	X	X	X	X	X	X	X
9.11	Change Management Procedure		In liaison with the other members of the Project Team, establish post contract Cost and Change Control procedures in order to see financial control covering the issue of instructions which vary the Works and the issue of cost reports to the Employer.	X									
9.12	Notify Change		Where the Client or Employer has indicated the possibility of a change to his requirements or any other change for any other reason inform the Employer of the implications to the project using the agreed cost control mechanisms in accordance with the Change Management Procedure, and seek instruction from the Employer.	X									
9.13	Sign off changes		See that any changes implemented during this or other stages of the works by the Client or Employer are signed off by the Client and the Employer before work proceeds.	X									
9.14	Compensation Events / Early Warnings / Variations		See that Consultants observe the provisions of Clause 6 (Compensation Events) of the Conditions of Appointment regarding cost control procedures and that the procedures for obtaining approval to introduce variations are followed. (NEC appointments).	X	X	X	X	X	X	X	X	X	X
9.15	Insurance claims		Assist the Employer to deal with any outstanding insurance claims.	X	X	X	X	X	X	X	X	X	X
9.16	Assist in Final Account		Assist the Employer in the settlement of the Final Account with the Client and with those of the Contractors by providing such information as may be reasonably necessary.	X	X	X	X	X	X	X	X	X	X
10.00			NON CORE SERVICES (subject to additional fee)										

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10.01	Site Staff		Discuss with the Employer the need for site inspection staff and seek instructions.	X	X	X	X	X	X	X	X	X	X
10.02	Witness		If instructed by the Employer, (subject to the payment of additional fees), arrange to act as expert witness at any hearing or planning enquiry and the like or,	X	X	X	X	X	X	X	X	X	X
10.03	Non UK Works Visits		As required by the Employer visit the sites of extraction & manufacture of materials and components and report to the Employer	X	X	X	X	X	X	X	X	X	X
10.04	Assist in disputes		Assist the Employer to deal with all matters including (but not limited to) all activities in connection with the adjudication of disputes between the Employer and any of the Contractors, concerning the Works contract as is necessary in order to achieve the satisfactory completion of the Works. Where this would involve the adjudication against the Consultant, this shall only include giving such assistance up to the commencement or earlier notice of such adjudication.	X	X	X	X	X	X	X	X	X	X