

	PROJECT DESIGN GUIDES	Schedule of Services	DRAFT
---	-----------------------------	----------------------	-------

Project Name:	Project No.:	Update:
Name	Number	Date

Key: Architects - Structure & Civil - Building Services - Landscape Designers - Highways Engineer -	DRAFT TO BE AGREED
	TO BE APPENDED TO CONSULTANT APPOINTMENTS
	TO BE INCLUDED IN SUB-CONTRACT PACKAGE INFORMATION

Scope of Service relates to the RIBA Stages:	Comments
Clients design	As RIBA stage 1 & 2
Clients design	As RIBA Stage 3
Contractor phase design	As RIBA stage 3 & 4 Any stage 3 elements not completed by the clients team
Construction phase	As RIBA stage 5 & 6

Key: L - Lead (overall design lead on an item). To manage design consultants but not be held responsible for other consultants quality of information. DL - Discipline Lead (lead only in respect of professional discipline as appointed) A - Advise / Support / Assist	Note:	Revision:
--	-------	-----------

SPECIFIC NOTES (relating to any particular project specific matters)

Items crossed through do not form part of this agreement.
 Client/Customer refers to: ????

Employer refers to: **Main Contractor**

Ref.	Service	Sub Ref.	Duties	Lead Design Consultant	Architect	Structural & Civil Engineer	Highways Engineer	Building Services Engineer	Landscape Architect		Other e.g. MEPH sub-contractor, Steel fabricator	Comments	
0.00			GENERAL	???	???	???	???	???	???				
0.01	Lead Consultant (Ex RIBA)		a. Leads and co-ordinates preparation of a project quality plan, and work stage programmes, including work outstanding from previous stages. b. Directs the work of the design consultants. c. Reviews the progress of design work in conjunction with the Lead Designer and CDM Coordinator. d. Facilitates communications between the Employer and design consultants. e. Advises on the need for and the scope of services by consultants, specialists, sub-contractors or suppliers. f. Receives regular status reports from each design consultant. g. Develops and manages change control procedures, and makes or obtains decisions necessary for time and cost control. h. Reports to the Employer at regular intervals on progress, to obtain further instructions or approval to proceed.										
0.02	Lead Designer		a. Directs the design process. b. Coordinates preparation of work stage programme(s) for the design process. c. Coordinates design of all constructional elements, including work by consultant specialists or suppliers and for health and safety matters in conjunction with the Principle Designer (PD). d. Establishes the form and content of design outputs, their interfaces, inputs to and a verification procedure. e. Communicates with the Employer on significant design issues.	L									
0.03	Principle Designer (PD)		Undertake the duties of the Principle Designer (PD) under the CDM regulations.	Assume client responsibility									
0.04	Third Party coordination		Coordinate all consultation with third parties that relates to the design of the Development, relevant to Consultants discipline.	L	DL	DL	DL	DL	DL		DL		
0.05	Design Responsibilities Matrix (DRM)		See that the preparation and completion of the DRM is done to the satisfaction of all parties.	L	DL	DL	DL	DL	DL				
0.06	Deliverables Schedules (DIRS / MIDP)		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 DMS/CDE, at the project stage agreed with the employer.	L	DL	DL	DL	DL	DL				
0.07	Package Information		Package information to be issued in packages to meet the employers Tender & Construction programme.		DL	DL	DL	DL	DL				
0.08	RIBA defined responsibilities		Account for design responsibilities in the RIBA Plan of Work 2013 and BSRIA Design framework for building services' (BG 6), in addition to those listed in this document.										
1.00			SURVEYS										

Ref.	Service	Sub Ref.	Duties	Lead Design Consultant	Architect	Structural & Civil Engineer	Highways Engineer	Building Services Engineer	Landscape Architect		Other e.g. MEPH sub-contractor, Steel fabricator	Comments
1.01	Models		Identify the need for models for items such as Thermal, Wind and Acoustic and take receipt of results and coordinate into the design, as required.		DL	DL	DL	DL				
1.02	Surveys	a	Advise on any surveys, land, below ground (including services), existing structures and environment to be carried out;		A	A	A	A			A	
		b	Take receipt of all reports and assess implications, interpret results and see that findings are reviewed and incorporated in compliance with the brief;		DL	DL	DL	DL	DL		DL	
		c	Consult as necessary with any local or other authority on matters relating to the proposed works;		DL	DL	DL	DL	DL		DL	
		d	Assist the Employer to arrange for any necessary further investigation or surveys to be undertaken.		A	A	A	A				
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.		DL	DL	DL	DL	DL		DL	
		b	Advise on the effect of any physical site restrictions, which may effect design options.	L	A	A	A	A	A		A	
1.04	Independent Design checks		Carry out independent checking of designs prepared by Contractors, where relevant to profession and experience.		DL	DL	DL	DL				
1.05	Condition Schedule		Obtain from the Employer 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 within reason of any further information requires for the proper carrying out of the Services.	L	DL	DL	DL	DL	DL		DL	
2.00			HEALTH AND SAFETY AND ENVIRONMENT									
2.01	CDM 2015		Perform all the duties of a 'designer' under the Construction (Design and Management) Regulations 2015.	L	L	L	L	L	L		L	
2.02	Competency Questionnaire		Complete the Employer's Design Competency Questionnaire and Health & Safety Standards for Consultants and Designers.		DL	DL	DL	DL	DL		DL	
2.03	Record Drawings	a	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).		DL	DL	DL	DL	DL		DL	
		b	Review record drawings by Highways subcontractor (which must be issued in .dwg format).				L					
2.04	Safety policies		Abide by the employers safety policy in addition to the CDM regulations.	L	L	L	L	L	L		L	

Ref.	Service	Sub Ref.	Duties	Lead Design Consultant	Architect	Structural & Civil Engineer	Highways Engineer	Building Services Engineer	Landscape Architect		Other e.g. MEPH sub-contractor, Steel fabricator	Comments
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, where relevant to profession and experience.		DL	DL	DL	DL	DL		DL	
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.		L	L	L	L	L		L	
2.07	Risk Management		Eliminate hazards and risks during design, provide information about remaining risks or other design outputs as required to comply with the Construction Design and Management (CDM) Regulations 2015, having cognisance of construction methodology and logistics.	L	L	L	L	L	L		L	
2.08	Environment		Understand the employers environmental policies and strategy. Implement environmental design solutions to meet or better project brief requirements.		L	L	L	L	L		L	
3.00			DESIGN BRIEF									
3.01	Statement of Need		Ascertain the Authorities/Client'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.	L	DL	DL	DL	DL	DL		DL	
3.02	Define objectives, constraints and criteria for development	a	In conjunction with the Employer (where agreed with the employer) develop the strategic brief for the Project, by engaging with stakeholders through a collaborative process;	L	DL	DL	DL	DL				
		b	Co-ordinate site appraisals; investigations environmental and feasibility studies;	L								
		c	Provide broad guidelines on scheme affordability and other cost studies.	L								
3.03	Identify options		Carry out initial appraisal studies including any preliminary feasibility work, identify possible options and make recommendations to the Employer.									
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.									
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;	L	DL	DL	DL	DL	DL		DL	
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;	L								
		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.	L	DL	DL	DL	DL	DL		DL	

Ref.	Service	Sub Ref.	Duties	Lead Design Consultant	Architect	Structural & Civil Engineer	Highways Engineer	Building Services Engineer	Landscape Architect		Other e.g. MEPH sub-contractor, Steel fabricator	Comments
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.	L	DL	DL	DL	DL	DL		DL	
4.00			APPROVALS and COMPLIANCE									
4.01	Manage third party approvals		Manage the arrangements for obtaining third party approvals including but not limited to local authorities, issues, where relevant to profession and experience.		DL	DL	DL	DL	DL		DL	
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;	L	DL	DL	DL	DL	DL		DL	
		b	See that the design complies with all Client and funders required design standards.	L	DL	DL	DL	DL	DL		DL	
4.03	Liaise with statutory utilities		Liaise with statutory utilities on any upgrades, new supplies and diversions on and around the site including highways.				DL	DL			DL	
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;									
		b	Make necessary submissions to Statutory Authorities and seek approvals, where directed by the employer.									
4.05	Planning Inquiry		Where necessary act as a witness at any hearing or planning enquiry or the like.		DL	DL	DL	DL	DL			
4.06	Planning conditions	a	In co-ordination with the other Consultants seek to resolve all relevant outstanding conditions attached to the planning approval and advise the Employer of progress on a regular basis.		DL	DL	DL	DL	DL			
		b	Advise the Employer of any compliance implications the conditions may have on the scheme and use reasonable endeavours to ensure any actions taken to resolve them are within the cost plan.	L	A	A	A	A	A			
		c	Pre-commencement and early critical planning conditions to be checked, collated and issued by the Planning Consultant.									
4.07	Approvals	a	Establish regular reporting procedures with the Employer and identify those matters, which require approval with the client and where necessary,	L								
		b	Provide assistance to obtain those approvals.		DL	DL	DL	DL	DL		DL	
4.08	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.	L	DL	DL	DL	DL	DL			
4.09	Advice on samples, models etc		Advise the Employer on the need for any samples, models to be submitted to the Client (see also 5.14).	L	A	A	A	A	A		A	

Ref.	Service	Sub Ref.	Duties	Lead Design Consultant	Architect	Structural & Civil Engineer	Highways Engineer	Building Services Engineer	Landscape Architect		Other e.g. MEPH sub-contractor, Steel fabricator	Comments
4.10	Advice on testing		Advise the Employer on the need for any testing of components and materials.		A	A	A	A	A		A	
4.11	Building regulations		Arranging for the sign off of all Building Regulations queries relating to design (not site matters).	L	DL	DL	DL	DL	DL		DL	
4.12	Statutory Certificates		Seek that all statutory Certificates and Approvals are given to the Employer.	L	DL	DL	DL	DL	DL			
4.13	Other Design Standards		Use reasonable endeavours to ensure that the designs for the Works fully comply with all Client and funders required design standards, including but not limited to independent certifiers.		DL	DL	DL	DL	DL		DL	
4.14	Further Client Information		<i>Moved to Section 10.</i>									
4.15	Approval to proceed		Seek that Employer Approval is obtained for each Phase of design development.	L	DL	DL	DL	DL	DL			
5.00			DESIGN INFORMATION									
5.01	Approval to proceed	a	Seek to obtain the Employer's approval to proceed with the preparation of the design at each Phase;	L	DL	DL	DL	DL	DL		DL	
	Stage Reports	b	In liaison with the other Consultants and in conjunction with the Employer, prepare Stage reports, as identified by the employer, and submit.	L	DL	DL	DL	DL	DL		DL	
5.02	DEP / BEP		Contribute to the production of the Employer's Design Execution Plan (DEP) or BIM Execution Plan (BEP).	L	DL	DL	DL	DL	DL		DL	
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.	L	DL	DL	DL	DL	DL		DL	
5.04	Manage area schedules	a	Provide area schedules to suit 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 and client/employer area % tolerance requirements;		L							
		b	Review and update areas at all stages of the project, taken as RIBA stages unless advised otherwise;		L							
		c	Review all areas when considering a potential design change;		L							
		d	Advise Employer on any compliance issues.	L								
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;	L								
		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;	L	DL	DL	DL	DL	DL		DL	
		c	Provide response to the Lead Consultant for any Employer queries raised during any stage of the works;		DL	DL	DL	DL	DL			
		d	Respond to technical queries raised and update and re-issue drawings and / or specifications accordingly for construction purposes. To be instructed where deemed a variation.		DL	DL	DL	DL	DL		DL	

Ref.	Service	Sub Ref.	Duties	Lead Design Consultant	Architect	Structural & Civil Engineer	Highways Engineer	Building Services Engineer	Landscape Architect		Other e.g. MEPH sub-contractor, Steel fabricator	Comments
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;	L	DL	DL	DL	DL	DL		DL	
		b	List of all information required from other parties in order to finalise own deliverables.		DL	DL	DL	DL	DL		DL	
5.07	Design Information Required Schedule (DIRS)		All parties to provide a list of all information they require, at the beginning of each stage, including required by dates, to complete their design for that stage to meeting the employers programme.	L	DL	DL	DL	DL	DL		DL	
5.08	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.	L								
5.09	Specification	a	Agree materials and construction specifications with the Consultants and the Employer;	L	DL	DL	DL	DL	DL		DL	
		b	Prepare materials and construction specifications and keep the Employer fully informed.		DL	DL	DL	DL	DL		DL	
5.10	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. Relevant to profession and experience.		DL	DL	DL	DL	DL		DL	
5.11	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;		DL	DL	DL	DL	DL		DL	
		b	Subsequently within the scope of Consultant's inspection obligations see that such materials are not used in connection with the Works.									
5.12	Concept Design Stage 'C/2'		Develop a concept 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 concept 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.									
5.13	Developed Design Stage 'D&E/3'		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. In respect of MEP consultants services, any production information by specialists to be defined within the BSRIA design framework.	L	DL	DL	DL	DL	DL		DL	

Ref.	Service	Sub Ref.	Duties	Lead Design Consultant	Architect	Structural & Civil Engineer	Highways Engineer	Building Services Engineer	Landscape Architect		Other e.g. MEPH sub-contractor, Steel fabricator	Comments
5.14	Prepare Technical Design Stage 'F/4'	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. In respect of MEP consultants services, any production information by specialists to be defined within the BSRIA design framework. Consultant to work up to BSRIA stage 4a.		DL	DL	DL	DL	DL		DL	
		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.		DL	DL	DL	DL	DL		DL	
		c	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 (by structural engineer) for the information of the Employer in sufficient detail for construction purposes.		DL	DL	DL	DL	DL		DL	
5.15	Models, mock ups and prototypes		Provide design information for construction of prototypes, mock-ups or models as required by the Employer.		DL	DL	DL	DL	DL		DL	
5.16	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; To be instructed where deemed a variation.	L	DL	DL	DL	DL	DL		DL	
		b	Respond to technical queries raised and update and re-issue drawings and / or specifications accordingly for construction purposes.		DL	DL	DL	DL	DL		DL	
5.17	Design Protocols		All design information is to be fully compliant with all the Clients/Employers relevant protocols.	L	DL	DL	DL	DL	DL		DL	
5.18	Certificates of Compliance		Certificates of Compliance (CoC) are to be issued to the Employer with original signatures by authorised personnel for all stages of the project in accordance with the Clients protocols.	L	DL	DL	DL	DL	DL		DL	
		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.		DL	DL	DL	DL	DL		DL	
6.00			COOPERATION, COLLABORATION, COMMUNICATION and COORDINATION									
6.01	Public relations		Undertake necessary preparations and attendance at any briefing or public relation meetings.	L	DL				DL			
6.02	Sub consultants		Employ any sub consultants necessary to execute the consultant duties and responsibilities, where agreed with the employer.		DL	DL	DL	DL	DL		DL	

Ref.	Service	Sub Ref.	Duties	Lead Design Consultant	Architect	Structural & Civil Engineer	Highways Engineer	Building Services Engineer	Landscape Architect		Other e.g. MEPH sub-contractor, Steel fabricator	Comments
6.03	Highways co-ordination		Liaise and co-ordinate the design of the works with all other consultants including the highways infrastructure.	L	DL	DL	DL	DL	DL		DL	
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.	A								
6.05	Design reviews	a	Coordinate and lead the other Consultants in a full design review of the Client's requirements, budgets and timetable;	L								
		b	Report findings and suggestions to the Employer.	L								
6.06	Interfaces		Prepare coordinated details at interfaces to assist the employer in apportioning contractor design and/or supply scope.	L	DL	DL	DL	DL	DL		DL	
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;	L								
		b	Subsequently assist the Employer in all matters leading to their appointment and;	L								
		c	Assist in preparing briefs covering the scope of the services for which they will be responsible;		A	A	A	A	A			
		d	Fully integrate designs produced by other Consultants.		DL	DL	DL	DL	DL		DL	
6.08	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.	L	DL	DL	DL	DL	DL		L	
6.09	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.	L								
6.10	Tenant Fit-out works		Liaise, manage and integrate interface considerations of all design aspects of tenant's fit-out works.	L	DL	DL	DL	DL	DL		DL	
6.11	Exchange of design information		See that the exchange of design or other information between the Consultants is satisfactory throughout the course of the Project.	L								
6.12	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.	A								
6.13	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;	L								
		b	Provide plans for the approval of the above.		DL	DL	DL	DL	DL		DL	
6.14	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.	L	DL	DL	DL	DL	DL			

Ref.	Service	Sub Ref.	Duties	Lead Design Consultant	Architect	Structural & Civil Engineer	Highways Engineer	Building Services Engineer	Landscape Architect		Other e.g. MEPH sub-contractor, Steel fabricator	Comments
6.15	Information check and co-ordination of suppliers information	a	At all stages review the Contractors and Suppliers drawings and details (insofar as it relates to the Consultants profession) 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);	L	DL	DL	DL	DL	DL			
		b	Follow the DEP/BEP 3DD protocol, using the DMS/CDE where appropriate of all issues relating to supplier information;	L	DL	DL	DL	DL	DL		DL	
		c	Assist the Employer in notifying the Client of the implications of any changes required and their impact upon the works as they occur;	L	A	A	A	A	A		A	
		d	Integrate upon agreement with the employer of any issues arising with the design proposals. To be instructed where deemed a variation.		DL	DL	DL	DL	DL		DL	
6.16	Trackers, schedules, lists, logs.		Update and circulate in a timely manner all trackers, schedules, lists and logs of information that is the responsibility of the consultant (e.g. planning conditions, samples, design changes, etc).	L	DL	DL	DL	DL	DL		DL	
6.17	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.	L	DL	DL	DL	DL	DL		DL	
6.18	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.		A			A			L	
6.19	Post Contract		Moved to section 10									
6.20	BIM	a	Work collaboratively to agreed* BIM 3DD procedures and protocols, on a common platform** or one that provides interoperability, to BIM maturity Level 2.	L	DL	DL	DL	DL	DL		DL	
		(i)	*Agreed between Client, Contractor, Designers, Sub-contractor Designers, Suppliers & others to be identified.									
		(ii)	**A common platform refers to software, Intranet or Extranet project management system and any other requirement needed to be common to all parties.									
		d	Agree COBie and other post completion outputs with client/clients FM providers for inclusion of information for asset maintenance and operation. Managed by the employers BIM Data Manager.	X	X	X	X	X	X		X	
		e	Provide information exchange activities as Information Manager as defined in Table 2 of PAS 1192-2:2013.	X	X							
		f	Provide information exchange activities as Lead Designer as defined in Table 2 of PAS 1192-2:2013.	X	X							
		g	Provide information exchange activities as Task Team Manager, Task Information Manager, Interface Manager and Information Originator as defined in Table 2 of PAS 1192-2:2013		X	X	X	X	X		X	
		h	Update the PIM for 'As Built' to enable it to be turned into an accurate AIM.		X	X	X	X	X		X	

Ref.	Service	Sub Ref.	Duties	Lead Design Consultant	Architect	Structural & Civil Engineer	Highways Engineer	Building Services Engineer	Landscape Architect		Other e.g. MEPH sub-contractor, Steel fabricator	Comments
		i	Ensure individual models are federated and co-ordination issues, not easily resolved, or affect other disciplines, are raised with the Lead designer.		DL	DL	DL	DL	DL		DL	
		j	Ensure individual federated models are co-federated for issue as the PIM	L	DL							
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;	A								
		b	See that the other Consultants comply with the plan and in the achievement of the cost budget;	L								
		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;	L	DL	DL	DL	DL	DL			
		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.	L	DL	DL	DL	DL	DL			
7.02	Assist pre-tender checks		Assist the Employer to see that a pre-tender cost check is prepared based on the tender documentation.	A	A	A	A	A	A			
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; where relevant to profession and experience.	L	DL	DL	DL	DL	DL			
7.04	Design for Procurement Information		Prepare design information of an appropriate and suitable level (e.g. RIBA Stage 3/4) to enable the Employer to seek and obtain robust proposals by relevant package from the market.	L	DL	DL	DL	DL	DL			
7.05	Sub-contractor Tendering Process	a	Assist the Employer to deal with all enquiries from the Contractors during the tendering periods and;	L	A	A	A	A	A			
		b	See that any clarification on the content of the documentation provided to any tenderer is sent to all others;	L	DL	DL	DL	DL	DL			
		b	Attend and Participate in mid tender interviews, if invited by the employer.	L	DL	DL	DL	DL	DL			
7.06	Assist tender appraisals		Assist the Employer to carry out tender appraisals, if invited by the employer.	L	A	A	A	A	A			
7.07	Examine tenders technical compliance	a	Review tenders received for technical compliance, if invited by the employer and;	L	DL	DL	DL	DL	DL			
		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;	L	DL	DL	DL	DL	DL			
		c	Seek the Employer's instructions.	L	DL	DL	DL	DL	DL			
7.08	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.	L	DL	DL	DL	DL	DL		DL	

Ref.	Service	Sub Ref.	Duties	Lead Design Consultant	Architect	Structural & Civil Engineer	Highways Engineer	Building Services Engineer	Landscape Architect		Other e.g. MEPH sub-contractor, Steel fabricator	Comments
		b	Incorporate the design programme requirements of the other Consultants and see that this is integrated with the Project Programme;	L	DL	DL	DL	DL	DL		DL	
		c	Incorporate the design programme requirements of Contractor and Supplier designs and see that this is integrated with the Project Programme.	L	DL	DL	DL	DL	DL		DL	
7.09	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;	L	DL	DL	DL	DL	DL		DL	
		b	Provide a copy of the programme to the Employer.	L								
7.10	Design programme reports	a	Prepare a report showing the progress made against the agreed design programme;	L	DL	DL	DL	DL	DL			
		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;	L	DL	DL	DL	DL	DL			
		c	Submit the report to the Employer at not more than monthly intervals or at such intervals as the Employer may instruct.	L	DL	DL	DL	DL	DL			
7.11	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, where relevant to profession and experience.	L	A	A	A	A	A		A	
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.	L	DL	DL	DL	DL	DL			
8.02	Electronic information		The Consultant shall use the employers choice of web based DMS/CDE tool as the primary means of communication on this project. The use of which will be governed by the Client/project protocols.	L	DL	DL	DL	DL	DL		DL	
8.03	Attendance at meetings		Attend meetings as reasonable 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 IITT/Bid through to defect period.	L	DL	DL	DL	DL	DL		DL	
8.04	Land Acquisition	a	Assist the Employer, if necessary and required, to select and procure the site on behalf of the Client and;									
		b	Assist the Employer to assess the implications of any constraints which may be attached to the site.									
8.05	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.	L	DL	DL	DL	DL	DL		DL	

Ref.	Service	Sub Ref.	Duties	Lead Design Consultant	Architect	Structural & Civil Engineer	Highways Engineer	Building Services Engineer	Landscape Architect		Other e.g. MEPH sub-contractor, Steel fabricator	Comments
8.06	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;	L								
		b	Prepare and circulate minutes of the meetings to the Employer and other Consultants.	L								
8.07	Correspondence		Copy all correspondence to the Employer unless instructed otherwise.	L	DL	DL	DL	DL	DL		DL	
8.08	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;	L	DL	DL	DL	DL	DL		DL	
		b	Provide access to the Employers as to undertake assessment or audit of the Consultant's Quality Management System.		DL	DL	DL	DL	DL		DL	
8.09	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.	A	A	A	A	A	A		A	
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.									
9.02	Risk Management		Undertake risk assessments in conjunction with the Employer, and contribute to the Employer's risk management process	L	DL	DL	DL	DL	DL		DL	
9.03	Value management / value engineering		Undertake value management and value engineering exercises in conjunction with the Employer. Value engineering changes post financial close where instigated by the Employer are subject to instruction.	L	DL	DL	DL	DL	DL		DL	
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.	L	A	A	A	A	A		A	
9.05	Re-evaluation of risk and Value		Participate in the Re-evaluation of the Risk and Value Management reviews .	L	DL	DL	DL	DL	DL		DL	
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;	L	DL	DL	DL	DL	DL		DL	
		b	Seek the Employer's instructions.	L	DL	DL	DL	DL	DL		DL	
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;	A	A	A	A	A	A		A	

Ref.	Service	Sub Ref.	Duties	Lead Design Consultant	Architect	Structural & Civil Engineer	Highways Engineer	Building Services Engineer	Landscape Architect		Other e.g. MEPH sub-contractor, Steel fabricator	Comments
		b	Prepare detailed cost plans in accordance with the Employers approved cost expenditure limits and distribute copies of the cost plan to all Consultants.	A	A	A	A	A	A		A	
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;	L	A	A	A	A	A		A	
		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;									
		c	Seek the Employer's instructions at the first responsible moment to allow corrective action to be taken.	L								
9.09	Design to Cost / Budget		See that designs are developed, co-ordinated and tested to achieve agreed cost plan.	L	DL	DL	DL	DL	DL		DL	
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.	L	DL	DL	DL	DL	DL		DL	
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.	L	DL	DL	DL	DL	DL			
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 Change Management Procedure, and seek instruction from the Employer.	L	DL	DL	DL	DL	DL		DL	
9.13	Sign off Changes		See that any changes implemented during the works by the Client or Employer are signed off by the Client and the Employer and a variation notification issued before design proceeds.	L	DL	DL	DL	DL	DL		DL	
9.14	Compensation Events /Early Warnings / Variations		The Consultants are to observe the provisions of Clause for Compensation Events, of the Main Contract regarding cost control procedures and that the procedures for obtaining approval to introduce variations.	L	DL	DL	DL	DL	DL		DL	
9.15	Insurance claims		<i>Moved to Section 10.</i>									
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.									
10.00			NON CORE SERVICES (subject to additional fee)									
10.01	Site Staff		Discuss with the Employer the need for site inspection staff and seek instructions.	L	DL	DL	DL	DL	DL		DL	
10.02	Witness		If instructed by the Employer, arrange to act as expert witness at any hearing or planning enquiry and the like.	L	DL			DL	DL			

Ref.	Service	Sub Ref.	Duties	Lead Design Consultant	Architect	Structural & Civil Engineer	Highways Engineer	Building Services Engineer	Landscape Architect		Other e.g. MEPH sub-contractor, Steel fabricator	Comments
10.03	Further Client Information		Prepare as necessary, drawings, information and surveys, for the use of the Client for presentations to or negotiations with: adjoining owners, public authorities, licensing authorities, funders, the purchaser, any tenant or others. Prepare plans, where required, for conveyance, Land Registry and other legal purposes.	L	DL	DL	DL	DL	DL		DL	
10.04	Insurance claims		Assist the Employer to deal with any outstanding insurance claims.	L	A	A	A	A	A		A	
10.05	Non UK Works Visits		As required by the Employer visit the sites of extraction & manufacture of materials and components and report to the Employer.	L	DL	DL	DL	DL	DL		DL	
10.06	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,	L	A	A	A	A	A		A	
10.07	Post Contract		As instructed by the Employer participate in and assist in the development of the FM Strategy (see Section 8/9).	L	DL	DL	DL	DL	DL		DL	