

CIC Scope of Services Users' Pages

QUESTIONS ASKED ...

The questions below have been asked by users of the CIC Scope of Services and DefiniT allocation software package.

If you have any questions or comments, please email sos@cic.org.uk.

Page numbers refer to the hard copy Scope of Services, unless stated otherwise.

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1. CIC and RIBA stages

Q: Most consultants are familiar with the RIBA stages and price their fees on that basis. How do they relate to the CIC stages?

A: *You will find a comparison on page 6 of the Handbook. The break points between the CIC stages coincide with break points in the RIBA stages. That is,*

CIC stage 1 (Preparation) = RIBA stages A and B;

CIC stage 2 (Concept) = RIBA stage C;

CIC stage 3 (Design Development) = RIBA stages D and E;

CIC Stage 4 (Production Information) = RIBA stages F and G;

CIC stage 5 (Manufacture, Installation & Construction Information) = RIBA stage K;

CIC stage 6 (Post Practical Completion) = RIBA stage L.

The CIC stages reflect those adopted by many leading developers, the revised RIBA Plan of Work and the British Property Federation. They also match well with international systems.

2. Definition

Q: “Definition” is a new concept and I am finding it difficult to grasp what it means. Can you explain please?

A: *Definition is design + related activities (such as cost, programme, health & safety, performance, integration and co-ordination). Definition + construction = project. In other words, it is the whole package of activities to be undertaken by the project team before the contractor can build. Often the term “design” is used (the example “design and build”) – but more than design is involved and the non-designers shouldn’t be forgotten!*

3. Definition and review

Q: Can you explain the difference between definition and review services?

A: *Definition services are those referred to in question 2, and review services are the review of those definition services. For example, see 3R–11 architectural design “Receive and review development of the design for general conformity with the CCRs [Construction Contract Requirements eg employer’s requirements] ...” or 3R–14 “Receive and review development of the design for general conformity with regulations”.*

The definition services, stages 1D to 5D will always be needed; the review services may not be.

An example of where they will be used is where a client engages a design and build contractor at the beginning of stage 3 Design Development and the contractor engages new consultants and specialists to undertake definition services; the client may wish to retain its consultants to review the work of the contractor’s team, in which case they would undertake review services, stages 3R &4R.

4. Review tables

Q: Should stages 3R, 4R, 5R and 6R be automatically deleted when a traditional method of procurement is chosen?

A: *Stage 3R and stage 4R review services will usually not be needed and can be deleted. Stage 5D definition services are always undertaken by the contractor, meaning that the stage 5R review services will be undertaken by the client's consultants or specialists, and should not be deleted. They will also undertake stage 6R review services (post practical completion, the definition services have been completed so there is no state 6D.) See the example on page 11 of the Handbook. Stage 3R and stage 4R services might be required if, for example, a funder engaged consultants to review the work undertaken by the client's consultants.*

5. General allocation of roles

Q: Should this page (page 15) be included in the contract documents?

A: *It is useful to include this page (particularly in draft) as it gives a general overview of who is doing what. [When using DefinIT Team, the page will automatically be populated when tasks are allocated and is an option under the Print/Preview menu. It is headed "General Allocation – General overview only: for tasks to be undertaken see tasks allocated". Note: DefinIT Team is currently being tested and is not yet generally available.]*

6. Client's scope of services

Q: In the contract, do you include the client's scope alongside the consultants' scope? I am worried that the consultant will get defensive and say that something is the client's job and point to the item in the client's scope.

A: *Yes, the DefinIT print out will include the client/client representative scope as well as the other participants. The client has an important role, and it is useful for them (and the other participants) for their role to be clearly set out, avoiding potential misunderstandings later.*

7. Allocating tasks in the Specific Activities tables

Q: I am finding allocating the tasks in the Procurement, Planning Approval and Contract Administration and Construction Monitoring services tables difficult. Maybe this is because it is the very early stages of a project and the consultants have not yet been appointed – I am preparing consultant tender documents based on a very slim brief. How should I treat them?

A: *As far as you are able, it is as well to allocate tasks as the fee will be based on what the participant is to do. But if, for example, you do not know the procurement route you can either leave tasks unallocated (meaning that the fee for other tasks will have to be determined/agreed later) or make an assumption and allocate tasks on that basis (meaning that the fee might need to be adjusted later).*

8. Extent to be agreed

Q: There are various reference to “Extent to be agreed” (and a list on page 13). Can you give some examples please? At the very early stages of a project, this sort of thing may not have been considered or may not even be available.

A: *Here are some examples:*

Under GO–17 Copies of drawings and documents, a consultant might agree to provide three hard copies and one electronic copy of all drawings, documents and reports.

Under GO–9 a consultant may agree to instigate and keep up to date a project risk register and organise a monthly project risk review meeting. The advantage of agreeing the extent of the task in this way is that any further work would be a further services (see FS–1), which (depending on the conditions of contract) would attract an additional fee.

9. Extent to be agreed

Q: Where is the extent of these items to be written out?

A: *The matters agreed would be set out on a separate sheet and included in the contract documents.*

10. Further (and additional) services

Q: I am not clear about the Further Services table. Can you clarify?

A: *Further services are those which may be instructed by the client and, if not marked “not required”, the Consultant is required to provide subject to agreement of fees. They are typically extra services, being those not regularly required.*

They may be instructed by the client at the time the contract is entered into or at a later stage. In the latter case, they are additional services attracting an additional fee (depending on the conditions of contract).

For example:

FS–2. Whole life cost studies: If a consultant is asked to undertake whole life costs studies at the time the contract is entered into, the task should be allocated to that consultant, and will be included in the Definit list attached to the contract.

FS–15. Planning appeals: This would only be allocated at the time the contract is entered into if a consultant is asked to include in his fee the cost of assistance with a public enquiry or planning appeal. It is therefore more likely that this task will be unallocated at the contract stage, as the client will only instruct such services if it is known that there will be an appeal from a planning decision.

FS–23. Site, progress or other meetings beyond extent agreed as part of the Services: If a consultant has agreed to attend a certain number of meetings as part of the fee, and is then required to attend further meetings, that would be an Additional Service attracting an additional fee.

11. Statutory Authorities and planning permission – task 2D–37

Q: I assume this only applies if Planning Approval is included as an additional service?

A: *No: Statutory Permissions covers both planning and building regulation approvals (see Definitions page 9). A reminder is included that planning approval services are to be found in a separate table.*

12. Environmental performance accreditation – task GO–21

Q: What are the environmental accreditations referred to? Is this things like BREEAM?

A: **Yes: BREEAM (BRE Environmental Assessment Method), LEED (Leadership in Energy and Environmental Design) or other.**

13. Project specific tasks

Q: Is there a facility for inserting new tasks to suit the particular needs of the project?

A: *If you wish to allocate other project specific tasks, this should be done on a separate sheet of paper. [DefinIT Team provides this facility. It also allows tasks to be altered. Note: DefinIT Team is currently being tested and is not yet generally available.]*

14. Specific Scope Schedule

Q: I find this a very useful document. From a practical point of view I don't divide each item (for example Item 1.1 – Site Layout) into the various stages but just allocate the whole item to one consultant. Doing anything else is way too complicated. Design consultants are appointed at the very early stage of a project and it is often difficult to exactly determine their scope at the outset.

A: *A particular benefit of the Specific Scope Schedule is to define responsibility for the definition of specific components at different stages. For example, the structural engineer may be responsible for the steelwork definition through stage 4, but the steelwork contractor may be responsible for the final design of the connections in stage 4. Similarly façade definition may pass to a specialist at stage 3. The Specific Scope Schedule is available in DefinIT under the reference menu as an Excel spreadsheet for users to freely adapt to their particular project.*

15. DefinIT

Q: Is there a quick way to delete a whole table?

A: *Yes, double click in the top left hand corner of the table (above the “1” and to the right of the “A”) to highlight the table, then chose “Not required” from the edit menu.*

Your feedback is very helpful, thank you.