



## The CIC Scope of Services

*Imagine a construction project where the activities involved in bringing together and managing the design of the project are clear and transparent. Even better, all design related activities are allocated to the project's designers with no gaps, overlaps or inconsistencies. Each member of the team – be it consultant, contractor, specialist contractor, manufacturer or supplier – knows exactly what aspects of the design each in the team is responsible for, at which stage of the project, in what level of detail and what deliverable is expected of them, when. And all at the touch of a button ...*

*Imagine a project where all participants' interests are aligned and their contributions to the project (including those of the client) clearly understood – expectations match what the delivery team is required to do (and price), and ambitions are consistent across the project team ...*

Such a project can become a reality by using the CIC Scope of Services: integrated and detailed scopes of services, from inception stage through to post practical completion, for use by members of the project team undertaking the definition process (design and related activities) on major building projects.

The Scope of Services provides clients with a full menu of integrated services that will be required for the complete definition of the project to be constructed, irrespective of whether they are to be undertaken by consultants, specialists or contractors.

### ***The need for clarity in what is to be done***

The increasing complexity of building projects (in terms of technical content, integration of architecture and engineering, delivery mechanisms and external influences) and the need for greater efficiency in the design and use of buildings, demand greater precision in roles, duties and scope than ever before.

Most would say there is an overemphasis on contract terms used for employing designers (and a pre-occupation with 'liability'), rather than a concentration on what the designer is actually being employed to do. Is it not an indictment that whilst the industry offers an abundance of standard forms and bespoke contracts, it is only now that there is one standard document which brings together the necessary level of clarity and integration of design and other related activities?

The industry cannot afford the waste from designers' services being poorly defined, giving no level of detail or unified description of work stages. Too often there is a mismatch in the services, for example the stages or work to be performed within each stage are defined differently for each discipline; there is a lack of clarity of roles; the services assume a procurement route (and therefore a boundary between

contractor and designer) which may not be adopted; there is not an open book approach to scope, so gaps or overlaps exist – how many times do misunderstandings arise over the design split between consultants and contractors?

### ***Filling a gap***

The CIC Scope of Services therefore fills a significant gap. It provides the holistic view of the definition required from inception, through clearly defined stages of refinement, to completion for the construction and handover of a project. This approach makes it independent of contract terms or procurement route. Moreover, the Scope of Services is not just for the appointment of consultants: the tasks set out will be undertaken by consultants, specialists and contractors. Therefore the Scope of Services can also be used for the appointment of specialists and contractors to detail the design work that they are to undertake.

The documentation is intended to be used on sizeable construction projects where different disciplines of consultants and specialists are employed and is appropriate whatever the procurement route.

### ***The approach – ‘definition’***

The CIC Scope of Services cover what is commonly called the ‘design process’. The term ‘definition’ is used rather than ‘design’ though, because far more than design is involved and not all of those participating in the process undertake design. Thus the process includes costing, programming, planning, procurement, health & safety, management, co-ordination, monitoring against the client’s aspirations and objectives and so on.

The tasks to be undertaken as part of the definition process are set out in a series of tables. The tables therefore outline the tasks that need to be undertaken to determine or define what is to be constructed.

The project = definition plus construction

Some tasks may not be appropriate for a particular project. The key is that once the appropriate ones are chosen they are *allocated* to whoever is most suited to undertake them.

### ***Participants***

These definition services will be undertaken by a range of personnel, depending upon the contractual arrangements and responsibilities and the skills required for a particular project. Those contributing to the process will therefore be consultants, specialists and advisors of various kinds, specialist contractors and the contractor. For this reason, the services are not just confined to those to be carried out by the consultants.

For example, the design tasks are divided into Architectural Design, Civil & Structural Design and Building Services Design roles. These tasks will not all be undertaken by consultant architects, civil and structural engineers or building services engineers. For example, some of the building services tasks may be undertaken by a specialist contractor or supplier and aspects of the architectural design tasks may be undertaken by specialists (eg the façade or landscape). The contractor will also be involved in a level of ‘defining’ what is to be constructed under the construction contract – for example preparing manufacturing and installation drawings (as a minimum).

## ***Roles***

Since the tables set out the services to be undertaken by a variety of participants, the tasks are described by *role* rather than the discipline of whoever is to undertake them.

As well as the design roles mentioned above, there are further roles in the definition process, most obviously Cost Consultancy (some of which services will typically be undertaken by a quantity surveyor) and Health and Safety Consultancy (including, but not limited to, the tasks to be undertaken by the CDM co-ordinator).

Set out as separate roles are two vital functions: Project Lead and Design Lead. In brief, the Project Lead role is to lead and manage the team. The Design Lead role is to lead and co-ordinate those undertaking design. On a building project, the Design Lead role is likely to be undertaken in the initial stages by the same participant as the architectural design. On a civil engineering project it is likely to be the same participant as undertakes the civil and structural engineering design. On appropriate projects it may be the same participant as undertakes the building services design.

There is one further vital role, and that is the Client, acting either itself or through a representative. The Client may be an end-user client or design and build contractor and the tables set out what will be expected of that client as part of the definition process.

## ***Allocation of tasks***

The tables thus set out the tasks to be undertaken from the outset of the project to completion by a variety of personnel, being the consultants together with others described as specialists (ie those employed or to be employed by the client who contribute specialist knowledge or information to the design and definition of the project or carry out specialist investigations, tests and studies). This could include for example, specialist consultants, specialist contractors and contractors.

The tasks will be allocated to whoever is to undertake them, in so far as they are applicable for the particular project. At the outset, it may well not be possible to allocate all the tasks, for a variety of reasons. The procurement route may not be known and the need for other members of the project team may only emerge as the definition process proceeds, for example. The tables therefore determine the tasks agreed to be undertaken when the contract is formed, and allow unallocated tasks to be assigned later, as decisions on issues such as procurement are made. They are also an effective management tool for the definition process as the project progresses.

## ***Review services***

Alongside the definition services, there are also review services, setting out what is to be done to review definition work undertaken by others. An example would be consultants engaged by the client to review definition services undertaken by a contractor – typically during the later definition stages.

## ***Stages***

The Scope of Services is divided into six stages, with clear starting and end points, a defined level of detail for each stage and each stage ending with an overall deliverable that is approved by the Client. They are: stage 1 – preparation; stage 2 – concept; stage 3 – design development; stage 4 – production information; stage 5 – manufacture, installation and construction information; and stage 6 – post practical completion.

The stages match with international systems, those adopted by many leading UK developers, the BPF and map with the RIBA 2007 Plan of Work. Another difference in approach is to separate out specific activities (planning, procurement, contract administration and construction monitoring) which do not rigidly fit into definition stages.

## ***The Specific Scope Schedule***

The Specific Scope Schedule provides a further level of detail. It allows responsibility for the definition of components to be allocated between participants, by stage. It is a flexible document which needs to be adapted for each particular project, and so is made available as an Excel spreadsheet. Thus the potential for confusion over responsibility for underground drainage or sprinkler systems should really be a thing of the past, as the elements and stages for which design services are required are defined. A further benefit of detail is the clear framework it provides for change management.

## ***A menu of services***

The Scope of Services provide clients with a full menu of services that will be required for their project, whether they are to be undertaken by consultants (under a professional services contract) or specialists (under other terms) and the contractor (under the construction contract). For consultants it provides a clear framework for agreeing with clients and other consultants the level of service required, and the responsibilities of each party. It also provides a clear demonstration of the inter-reliance of the roles and hence the risks of allowing one role to lag behind (eg the inherent risk to an architectural concept if concept engineering has not informed it).

## ***Management tool***

The Scope of Services make clear the activities to be performed by each participant, for all elements of a project, at any stage. By providing this framework the Scope of Services allow broad assumptions about roles and responsibilities to be made at the outset of a project, and to be refined as the detail of the project and procurement route becomes clear.

## ***DefiniT – the allocation software package***

Allocation of tasks is most easily done by using the allocation software package, DefiniT. The software enables you to assemble and print schedules of services for each participant on the project.

## ***In summary***

The CIC Scope of Services provides:

- Integrated and detailed scope of services from inception to post practical completion for the complete definition of the project to be constructed;
- Clearly defined stages for the refinement of the project definition;
- Defined roles and clear responsibilities between the participants;
- Defined primary responsibility for the definition of each element by stage;
- A management tool for the definition process;
- A scope that is independent of contract terms or procurement route;
- The only industry standard document that provides the clarity and integration necessary to deliver design that can deliver client value.

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