

Transforming the Value of Consultancy

TVC Toolbox User Guide

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Overview

This TVC Toolbox provides updates to the RIBA Plan of Work Toolbox with Task Responsibility Matric Overlay that will support:

1. Consistent and standardised approach for identifying, assigning, and managing consultancy tasks and responsibilities.
2. Incorporate 'briefing and evaluation' tool, Asset Management review and Place Standard review processes to ensure the RIBA stages 0-1 can better define tasks, roles and responsibilities during briefing and for meetings/ soft landings etc.
3. Review the schedule of services and task responsibility- ensure they complement each other.
4. Procurement routes will be established from early engagement and clear task support to define objectives and requirements for the project.

The task related details can also be referenced in the separate **Stage Overviews (0-3)** where the tasks, roles and validation information are provided for separate stages of the RIBA Plan of Work.

The RIBA Plan of Work Toolbox- *with TVC* overlay explained

The TVC initiative has created a template (overlay) from a modified version of the RIBA Plan of Work 2020 Toolbox.

The RIBA Plan of Work is a widely adopted strategy across Scottish public sector projects, that provides a structured approach to all stages in the definition, planning, design and construction process, covering the whole project lifecycle, from inception through to completion, and in-use.

The roles and responsibilities overlay adds an additional template defining project tasks across the project life cycle, to be used to define roles and responsibilities.

This additional template will define consultants' roles across the project life cycle and not just design responsibilities for the design team.

Whilst designed for use on building and related projects, it can be easily adapted for infrastructure and other projects.

Essentially the toolbox helps to define the roles and responsibilities of the 3 key teams and how they are connected contractually:

1. The **client/ client advisory team** might comprise an individual or, on the largest of projects, several practices and individuals. The client team are not responsible for undertaking any design work but must compile the Project Brief and review the design during and at the end of each stage. Many client teams employ external professional advisers; others have in-house teams to guide them through each project stage.

The client will define the information management and procurement routes and scopes of services alongside the brief to ensure they have the necessary tools to guide and lead the project.

2. The **design team** generally including the architect, structural and building services engineers and the cost consultant, although it is commonplace for other specialist consultants, such as acousticians or fire engineers, to contribute to the development of the design. **Other advisory specialists**, who can support the client or the design team with advice and design support.
3. The **Delivery Team** is the contractor and subcontracted team and will include contracted consultants/ specialist advisors if using design and build contracts for example.

User Guidance

This 'User Guidance' document sets out information on the use of the Toolbox and is not intended to be a comprehensive user manual

Useful 'hints and tips' are provided in lightbulb boxes.



Hints and tips

The Toolbox provides you with:

1. A 'typical' example for the definition and development of professional consultant's scopes based on a typical project scope and scale. Think of this as a typical guide and not a fully worked up solution and should be used to tailor your own solution.
2. A 'smart' template that you can use to work up your own project details that can be completed to reflect the particular requirements for a specific client/Project.



When opening the Toolbox, accept enable content message

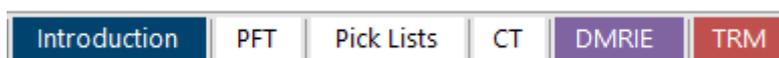
5

The Toolbox provides a coordinated schedule of functions, responsibilities and tasks designed to form a single 'scope of services', covering all roles and disciplines on a project. It adopts a structured approach, focussing on the **Function** and the **Role** to be performed, rather than the party undertaking the role.

It is intended that at RIBA Stage 0/1 the Toolbox will provide sufficient detail and clarity for consultants to understand the requirements and to prepare competent bids, for incorporation into appointments. It is not intended to be a static document but will be a key project tool which will evolve in line the development of the project definition and design.

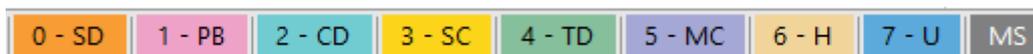
The Toolbox is a Microsoft Excel workbook, which contains a number of sheets, which can ultimately make up the **Scope of Services**. These have colour coded tabs with links from the **Introduction page**.

Scope of Services:

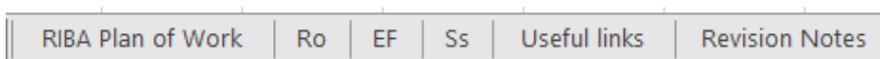


The PFT, DRMIE and TRM, identifies what will be undertaken, and by whom. The individual Stage sheets provide a more narrative form, providing more aspiration and explanatory information on the rationale and key inputs and outs from each RIBA Stage. Any specific strategies, procedures or process documents or standards to be applied should be identified on the appropriate RIBA Stage sheet to meet client or project requirements.

RIBA Plan of Work narrative:



Supporting information and weblinks:



The Toolbox contains pop-up Notes (which are open in the Template), to help guide the user, and can be closed.

The input sheets contain drop-down selection lists, linked back to the **Pick List** sheet where appropriate, these allow multiple selections to be made.



*If an error is made in multi-selection cells, entries cannot be deleted, use **clear contents** and start again!*

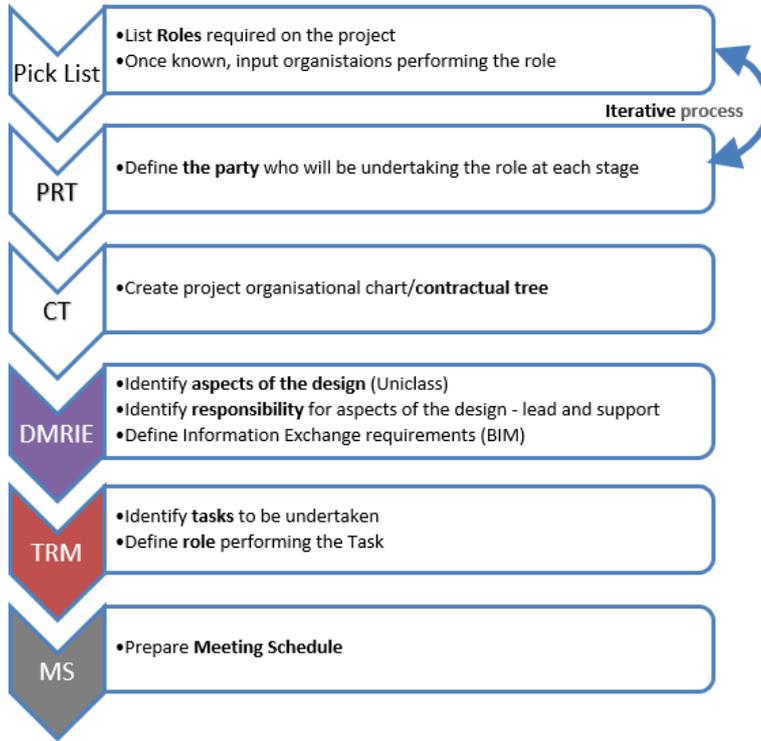


Figure 1: Toolbox completion steps

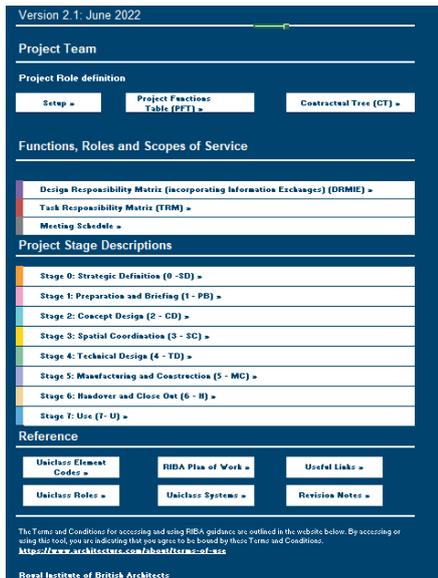


Figure 2 : Introduction Page

Step 1: Defining the functions and who will be responsible at each stage of the project



Whilst the RIBA Toolbox considers the aspects of the design of a project, it does not consider the tasks undertaken in the definition, design, management and delivery of the project. This is addressed in a new template – the **Task Responsibility Matrix (TRM)** sheet in the Toolbox.

This follows a similar approach as the DRMIE, allocating responsibility for undertaking and contributing to each task. The TRM however looks at the whole project process, picking up tasks that come before and at the start of any project.

The completed Templates provide the main tasks, common to most projects. These can be amended or supplemented to suit any particular project’s specific requirements.

 It is important that this is clearly defined as part of consultants’ tenders, to manage expectations and ensure that complete consultant bids are received.

We have listed the main tasks, common to most projects. There may be specific tasks related to this project that you would need to add. These sheets can be amended or supplemented to suit any particular project’s specific requirements. A particular focus has been placed upon client, project initiation and definition tasks in Pre-0, 0-2 as well as the importance of the use stage of the project.

Task Responsibility Matrix		Task Responsibility Matrix			NB This schedule is not exhaustive and consultants will			
<p>Project Tasks: List the specific Tasks which require to be undertaken in development of the design and delivery of the Project.</p> <p>Hint: avoid 'business as usual' tasks, which are inherent in the role or covered by the conditions of contract</p>		0 - Strategic Definition			1 - Preparation and Briefing			2 - Conc
		Client/Employer			Client/Employer			
Task	Document/Tools Links	Primary Responsibility	Support & Contribution	Notes	Primary Responsibility	Support & Contribution	Notes	Primary Responsibility
Project Requirements								
Adopt & implement SFT Briefing & Evaluation Framework	Briefing & Evaluation Framework							
Prepare Statement of Needs/Vision	Briefing & Evaluation Framework							
Prepare Strategic Objectives	Briefing & Evaluation Framework							
Prepare SMART Objectives.	Briefing & Evaluation Framework							
Evaluate throughout Project development	Briefing & Evaluation Framework							
Prepare Stakeholder Map	Briefing & Evaluation Framework							
Apply Place Standard Tool	Place Standard							
Prepare Project Initiation Document (PID)								

Figure 1: Screenshot of Task Responsibility Matrix

Step 2: Define Roles



The first step in completing the Toolbox is to identify what Roles will be required to define, develop and deliver the project.

This is an iterative process between **PRT** (**P**roject **R**oles **T**able) and the Pick **List** sheets.

Identify and list the Roles which will be required on the Pick List sheet.



The organisation who will be performing the role doesn't matter this stage. It can be completed later, once known and appointments have been made.

When considering the roles, further functions may be identified which need to be identified in the Pick List sheet

Input the **Role** which will be performing the function at each RIBA Stage on the **PRT** sheet. NB There is no multi-select option in these sheets – there can only be a single role performing a function.



create additional functions to sub-divide if necessary!

Define the Digital Information Exchange requirements (LOI and LOD) on the Pick List sheet.

A model Project Role Table and Glossary of Roles and Expertise is also available for reference and forms part of the TVC resources.

Step 3: Define Design Responsibilities

DMRIE

The **DMRIE** defines the **aspects of the design** and the roles with responsibility for their development. It also defines the level of design and information to be developed at each RIBA Stage.

In line with RIBA Plan of Work 2020, the DMRIE commences at RIBA Stage 2.

Define the **Aspects of the Design**. At project inception, the aspects of the design to be developed may not be known. The Template is therefore based on **Uniclass Element/Functions (EF)** at Group level, which is likely to be adequate for design consultant procurement. Depending on the level of project definition, this could be expanded to Sub-Group or System (Ss) level.



As the design develops, the level of definition can be expanded and developed to System (Ss). This is essential where design consultants are to be novated to the contractor under a design and build contract.

Identify and select the **role** with primary responsibility (Predecessor) and those supporting and contributing (dependencies) from the multi-select drop-down list.



Generally, a single role should be selected as Predecessor.

Define the Level of Information (Geometrical & Alphanumeric) for each RIBA Stage.



Refer to the Level of Information Need template.

Identify the extent of contractor design (design and build contracts) and contractor design portions (SBCC Traditional contracts).



It is important that this is clearly defined as part of consultants' tenders, to manage expectations and ensure that complete consultant bids are received.

At this stage you should identify anticipated requirements for collateral warranties.

The RIBA Plan of Work Toolbox uses selected Uniclass system codes. These may not cover all of the systems identified on a particular project.

As sufficient knowledge or information should be gathered and made available at the project initiation stages, to allow Systems to be identified.

For this reason, Uniclass Elements/Functions have been selected in the TVC Toolbox Overlay. This provide a sufficient level of detail for the development of initial consultant scopes of service, prior to the design commencing and the full range of systems to be designed on a project are known.

This can be expanded as the design develops, to encompass all of the systems, to provide greater clarity and detail. This is beneficial to the contractor on a design and build contract, so that they have full knowledge of the design services being novated under the contract.

The DRMIE should be completed for each project, to suit the particular project requirements.

One issue that was identified with the DMRIE developed by RIBA is that it identifies the party with primary responsibility for design of a system {Predecessor}. However, the design process is not that simple – whilst one party may have primary and overall responsibility, support and contribution will be required from other parties (Dependencies). A column for this has been added at each Stage.

Aspect of Design:
 Select Uniclass Codes. Amend to suit particular project requirements. At Project definition (Stage 0 & 1) these are likely to be at Element/Function (EF) level of definition. As the project design and definition develops, they can be expanded to System (Ss).

2 - Concept Design **3 - Spatial Coordin**

Aspect of Design		Design team				Design responsibility (Predecessor)	Sup Contr (Depen
Uniclass Element	Element	Design responsibility (Predecessor)	Support & Contribution (Dependencies)	Level of detail (LOD)	Level of information (LOI)	Design responsibility (Predecessor)	Sup Contr (Depen
EF_15	Earthworks and remediation	Design responsibility: This is the party that is responsible for this aspect of design at this stage.	Support & Contribution Parties whose contribution and input is required to develop and coordinate the aspect of the design	Level of detail (LOD) Levels of detail set out how much geometric information is required. For further information please see: - https://toolkit.thenbs.com/articles/levels-of-definition	Level of information (LOI) Levels of information define specification and data requirements. For further information please see: - https://toolkit.thenbs.com/articles/levels-of-definition		
EF_15_10	Groundworks and earthworks						
EF_20	Structural elements						
EF_20_05	Substructure						
EF_20_10	Superstructure						
EF_25	Walls & Barrier Systems						
EF_25_10	Walls						

Figure 2: Screenshot of modified Toolbox, with Support & Contribution selection

Step 4: Project Meetings and Reviews

A blank template sheet is included to provide details of anticipated meeting attendance requirements. This is important to allow bidding consultants to assess the level of input required and to make adequate provision within their fee proposals.

It is expected that Soft Landing stages should be included in this summary, ensuring that the project review stages are clearly defined with all parties involved.

Step 5: Model Stage Overviews

An overview of the project and the 7 stages is provided in the individual model RIBA Stage Overviews (provided separately for stages 0-3)- These Stage Overviews include a detailed stage 0 that covers a public authority SCIM process including asset management strategies and budgeting.

The sheets have been adapted and developed from the RIBA Toolbox and provide explanatory information on the rationale and key inputs and outputs from each RIBA Stage.

These sheets detail the initiatives and guidance documents that should apply and guide the project at the individual stages (adding Value), reflect government Construction Industry Transformation Drivers (re-using assets and net zero for example), as well as the information management processes that will be used to underpin the process.

Any specific strategies, procedures or process documents or standards to be applied should be identified and can be added on the appropriate RIBA Stage sheet to meet particular client or project requirements.



You should consider your briefing and evaluation process- the measurable objectives for the project will help to shape both the procurement route taken as well as the budget and professional team support against each of these.

These sheets can help to inform the PID and reporting to elected members and sponsors of the project etc.



It will be useful to come back to these sheets/ the measurable objectives at the end of the toolbox review and cross check against the functions and roles you have established.

These sheets can also form part of your scope of services appointments.

Ends