

<p>STAGE OVERVIEW - RIBA Plan of Work</p>	
<p>Stage 1- Preparation and Briefing</p>	
<p>Stage Outcome</p>	
<p>Project Brief approved by the client and confirmed that it can be accommodated on the site.</p>	
<p>Stage Overview</p>	
<p>Ther RIBA Plan of Work Overview says:</p> <p>If Stage 0 has determined that a building project is the best means of achieving the Client Requirements, the client team begin the briefing process during Stage 1. The Client Requirements for the project are considered in more detail, in connection with a specific site or sites, and the outcomes recorded in the Project Brief.</p> <p>The Project Brief will contain guidance on the Project Outcomes, Sustainability Outcomes and Quality Aspirations. These may influence how the client, design and construction teams are assembled to form the project team, as part of the Procurement Strategy, and may dictate the core</p>	

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milestones in the Project Programme. Some clients give detailed, prescriptive briefing guidance, while others leave such considerations to the design team.

This stage is about developing the information that the design team will need to commence the design process at Stage 2. Feasibility Studies might be required in order to tease out the full range of briefing considerations and to demonstrate that the Spatial Requirements can be accommodated on the site. In some instances, several options might be prepared, but these options should not be vetted and appraised at this stage. Feasibility Studies are not part of the design process. For example, illustrative masterplan visions might be prepared in order to determine and shape the brief, and to tease out decisions that will be required on certain topics, but they are not part of the design process itself. As there is a direct correlation between cost and a building’s area, the Spatial Requirements do need to be tested against the Project Budget.

The design team, with appropriate knowledge, skills and experience to deliver the Project Outcomes, needs to be selected, ready for Stage 2 to commence. On smaller projects, this team may already have been appointed to develop the Project Brief.

As the construction industry uses more digital tools and nudges towards greater uptake of whole life considerations, the information landscape is becoming more complex. The Information Requirements are therefore set at Stage 1, including whether the design team will deliver Prescriptive Information or Descriptive information in Stage 4. A Responsibility Matrix also needs to be prepared so that it is clear what tasks will underpin the production of information and who will undertake them. The matrix needs to focus on the boundaries between Stage 2 and Stage 3 tasks, and between the design team and any specialist subcontractors at Stage 4. A Project Execution Plan should be prepared, and a Digital Execution Plan will allow the design team to set out how they will produce the information.

A comprehensive set of Site Information needs to be sourced, including Site Surveys, ready for Stage 2 to commence.

TVC Stage Overlay Guidance:

The Statement of Need and outcomes developed during Stage 0 will be developed into a Project Brief during Stage 1. The SFT **Briefing & Evaluation Framework** should continue to be adopted to support this exercise.

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In addition to functional and operational requirements, the Project Brief will contain guidance on the Project Outcomes, Sustainability and Environmental Outcomes and Quality Aspirations. These may influence how the client, design and construction teams are assembled to form the project team, as part of the Procurement Strategy, and may dictate the core milestones in the Project Programme.

The final design team is generally not in place for Stage 1, although design support should be provided to support the development of the Client Requirements. This can be provided by in-house resource if suitably experienced personnel are available or can be separately procured externally as separate appointments. In order to achieve best advice and support, it is recommended that the Project Manager and Cost Manager are appointed early in Stage 1.

The client will appoint an Information Manager and develop the Employer's Information Requirements (EIR's). and the **Standard Information Management Plan (SIMP)**

Feasibility Studies might be required in order to tease out the full range of briefing considerations and to demonstrate that the Spatial Requirements can be accommodated on the site. In some instances, several options might be prepared, but these options should not be vetted and appraised at this stage.

The Client should appoint an Information Manager and prepare the Employer's Information Requirements (EIR's) and Standard Information Management Plan (SIMP) setting out the information to be delivered, standards and process to be adopted during the project design and delivery. The Design Responsibility Matrix and the **SFT Toolbox** should be prepared so that it is clear what tasks will underpin the production of information and who will undertake them. At this stage of the project development, the detail of the systems which are to be designed will not be known. For this reason, it is recommended that initial DMRIE is based upon Uniclass Elements/Functions, which generally can be established.

These can be expanded upon as the design develops during subsequent stages, adopting Uniclass System Codes

A key task during Stage 1 is to develop the Procurement Strategy and undertake the procurement of the design services. Whilst the form of the construction contract may well not have been fully developed, it is essential that this is considered, to ensure that the design appointments are

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appropriate and consistent with this. For example, if a 2-stage design and build for of construction is being considered, then provision for this option, including novation agreements must be made in the design consultant appointments.

Consideration must also be given and expected extent of contractor design portions/packages (CDPs) defined, such these add value to the design process and offer value for money. Similarly, the design consultant's responsibilities for monitoring construction quality and site attendance during the construction stage must be clearly defined, to ensure that the 'Golden Thread' is maintained throughout the Project duration. This is to ensure that the requirements are clear and that all design consultants bid on the same basis, avoiding potential for abnormally low tenders (ALTs) and ultimately the required quality standards are achieved throughout all stages of the Project.

The Project budget defined at Stage 0 will be developed into an Order of Cost report.

A Project Execution Plan should be prepared, and a Digital Execution Plan will allow the design team to set out how they will produce the information. The design team, with appropriate knowledge, skills and experience to deliver the Project Outcomes, needs to be procured, ready for Stage 2 to commence. On some projects, this team may already have been appointed to develop the Project Brief.

A comprehensive set of Site Information needs to be sourced, including Site Surveys, ready for Stage 2 to commence.

The Project Strategies identified at Stage 0 will be further defined and developed during Stage 1.

Stage Details- Skills and Expertise

- Stage 1 involves only the client team.
- The skills required will vary depending on the specific needs of the client and the project.
- Developing the Project Brief and the other outputs of this stage are skills that can be provided by specialists, such as RIBA Client Advisers who can also assist on selecting the design team.
- The Feasibility Studies might need architectural skills, and engineers or surveyors may be necessary to assess key Project Risks

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<p>All Parties</p>
<ul style="list-style-type: none"> • There are stages of project development and delivery that require collaboration across the client and specialist consultant team, utilising a range of skills to realise the best outcomes. <ul style="list-style-type: none"> ○ Gateway review- Gateway 1- will ensure key information is validated ○ Meeting schedules and programmes ○ Risk Workshop(s) ○ Stakeholder & Client engagement across the design ○ Health and Safety Strategy ○ Supporting the client with the contractor procurement options workshop(s) ○ Ensure appropriate representation alongside the client at the post tender interviews (ensuring the culture and values of the whole team are aligned) ○ Setting the sustainability objectives
<p>Client</p>
<ul style="list-style-type: none"> • This early stage is where the client should lead on defining the values and culture across the project lifecycle. The client should make provision for a range of skills and expertise to help to shape this stage of the project, including Briefing, cost, BIM, design, project management, whole life and plan for use. • Specifically responsible for leading the development, approval and validation to progress to stage 2 across: <ul style="list-style-type: none"> ○ project requirements ○ defining the brief ○ governance and approvals process ○ health and safety oversight – appointing the principle designer ○ quality culture- the quality plan and strategy ○ procurement options/ strategy and preferred route

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<ul style="list-style-type: none"> ○ sustainability strategy and approach for the project
<p>Project Management</p>
<ul style="list-style-type: none"> ● Project management skills and expertise are required to support the client across this stage of the project. ● The PM will be specifically responsible for, collaborating with design team members and the client: <ul style="list-style-type: none"> ○ Management stage details- Project Execution Plan, Project Programme and Project Reporting ○ Design- design responsibility matrix ○ Risk Management- risk register and workshop reviews
<p>Design Team/ Specialists</p>
<ul style="list-style-type: none"> ● Design specialists should be involved across stage 1- supporting the client/ PM in defining project requirements/ vision and briefing, management, health and safety, risk, cost, procurement and award, EIA and planning for use/ whole life of the project: <ul style="list-style-type: none"> ○ Vision, Outcomes and SMART objectives ○ Project budget and validation against the brief ○ Quality aspirations operational and spatial requirements ○ Cost reports/ end of stage cost plans ○ Design reports ○ Design responsibility matrix ○ Client brief and client requirements ○ Opportunities for MMC ○ Space Planning ○ Information Management- EIR and SIMP ○ Competency compliance ○ Cost details – affordability checks, analysis of cost options, elemental cost plans, cash flow, benchmarking against budget, and contingency strategy.

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<ul style="list-style-type: none"> ○ Tender queries and site surveys and investigations ○ Sustainability strategy ○ Project commissioning strategy
<p>Construction</p> <ul style="list-style-type: none"> ● The construction team are not engaged across this stage. ● Specialist input to the design brief/ client requirements may be required from the construction specialists
<p>Asset Management</p> <ul style="list-style-type: none"> ● Asset Management, Place and sustainability skills and expertise are essential in the development of the design. ● Developing the project commissioning strategy.
<p>Stage Outputs and Validation</p>
<p>All Parties</p> <ul style="list-style-type: none"> ● Confirm project vision, Outcomes and Smart Objectives including those defined by the client, funding conditions, standards or other stakeholder requirements ● Develop and confirm project quality aspirations, operational and spatial requirements ● Prepare Project Brief including project budget ● Ongoing validation and development of Project Brief ● Arrange & participate in Gateway Reviews ● Attend meetings as details on meeting schedule ● Attend risk workshops and reviews, contribute to Project Risk Register ● Stakeholder, client engagement

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- Undertake strategic appraisal/ place standards review to inform statutory requirements
- Contribute to health and safety strategy
- Review procurement options
- Contractor procurement options workshop

Client

- Statement of Needs/ Vision
- Project Outcomes
- SMART Objectives including those defined by funding conditions, standards etc
- Site Appraisals and Feasibility Studies
- Project Budget
- Project Information Requirements- BIM Grading
- Validate outcomes and objectives
- Project Business Case
- Stage reports and Stage Completion
- Authorise project move to next stage- Stage 2
- Approve Design reports
- ICT Strategy
- Appoint Principle Designer (where applicable)
- Assess Competencies- consultants and contractors
- Procurement Options/ Procurement Process
- Client Construction Quality Plan
- Maintain 'Golden Thread' on design quality
- Achieving sustainability objectives

Project Management

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- Project Execution Plan (PEP)
- Project Programme
- Project Report
- Project Risk Register
- Design Responsibility Matrix
- Contractor procurement options
- Tender queries/ recommendation
- Tender documentation

Design Team/ Specialists

- Quality aspirations
- Brief
- Cost report/ Stage reports
- Accommodation Schedules
- MMC opportunities
- Space Planning
- EIR
- SIMP
- Project Affordability check
- Cost options
- Elemental cost plan
- Cashflow
- Benchmarking
- Contingency development strategy

Construction

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N/A
Asset Management
<ul style="list-style-type: none"> Project commissioning strategy

STAGE DETAILS	STAGE BASED VALIDATION	CHECK YES/NO
Pre- Project, Strategic Capital Investment & Governance Approach		
N/A		
Defining Project Requirements	<p>Spent sufficient time to define and scope the project.</p> <ol style="list-style-type: none"> Project Initiation Document (PID) report- signed off Agreed the skills required- requirements/ influences, stakeholders. Detailed place requirements/ planning NPF 4 policy drivers (from team site visit). Client requirements Report (Vision and Objectives) from client workshop (s)- signed off report Outcomes/ Smart Objectives (Briefing and Evaluation) from client workshop- signed off report <p>Benchmark Project Carbon and Cost Budget Report- (with reference to the capital budget allocated).</p>	
Prepare Statement of Needs/Vision	Statement of Needs/ Vision report (In appropriate format) signed off by stakeholders (which details the purpose, context, scope and high-level aspirations for the project- what, why and for whom, established the key themes and project needs to address.)	

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STAGE DETAILS	STAGE BASED VALIDATION	CHECK YES/NO
Define Project Outcomes	Record 5-10 strategic outcomes -the key themes the project needs to address (via a project – client and stakeholders- Briefing and Evaluation Workshop)	
Develop SMART Objectives .	Recorded into Briefing and Evaluation template/ benefits realisation tracker a series of SMART objectives (that develop the vision into measurable and relevant objectives that will guide the project through its design, development and use lifecycle. This should detail how the project needs to perform to achieve these objectives.	
Undertake Site Appraisals & conduct Feasibility Studies	Established all you need to know about the site and/ or building in enough detail to prepare a realistic project budget. Build in the site constraints from- Pre-redevelopment audits; Surveys/ site/ landscape investigations including levels and site features etc/ feasibility covering economic, marketing, technical, financial, and management/ operational feasibility.	
Develop and confirm Project Budget	Benchmarked (to ensure they are robust) budget options that respond to the project requirements and reflect adequate consultants’ fees, costs for strategies, acquisition costs and reflect the outcomes of any project surveys/ feasibility etc.	
Develop project information requirements - Complete BIM Grading Tool	Programme parameters reflect the client requirements: <ul style="list-style-type: none"> • Dates and durations allocated to tasks. • A critical path (the sequence of critical tasks upon which the overall duration of the programme is dependent). • Tasks which can only be carried out after other tasks have been completed. • Tasks which can be carried out simultaneously. • ‘Float’ within tasks that are not on the critical path (that is, delays that can be incurred without affecting the critical path). Identifying float can be 	

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	<p>helpful in highlighting where it may be possible to transfer resources to tasks that are on the critical path.</p> <ul style="list-style-type: none"> The need for specific resources such as plant, services or materials and their lead time 	
Brief	Vision developed and owned by Client, setting out a clear approach for monitoring the outcomes/ validating the Smart Objectives supported with a refinement of the project budget.	
Confirm project Vision, Outcomes & SMART Objectives	Validated Vision, Outcomes and SMART Objectives set out to a clear template format.	
Develop and confirm project quality aspirations, operational and spatial requirements	<p>Confirmed project quality aspirations, operational and spatial requirements detailing standard methodology/ schedule of requirements under thematic areas, for example:</p> <ol style="list-style-type: none"> 1. Project Scope 2. Project Governance 3. Roles and Responsibilities 4. Quality Management Approach <ol style="list-style-type: none"> 4.1 Developing the Brief 4.2 Procurement 4.3 Design Stage 4.4 Construction Stage 4.5 Operational Stage 4.6 Meetings Structure 4.7 Change Control 5. Information Management and Technology 	

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STAGE DETAILS	STAGE BASED VALIDATION	CHECK YES/NO
Prepare Project Brief including project budget	<p>6. Communications Plan</p> <p>Brief drafted and project budget confirmed Recorded the process, detailing the wider discussion as appropriate, and the development of the Briefing and Evaluation Framework (BEF 7) vision, strategic outcomes and SMART objectives for comment. The feasibility studies should be developed with reference to the influences, stakeholders, place, vision, outcomes and objectives identified above as well as benchmark costs. The brief should clearly outline the process followed indicating who has been consulted, what were the outputs (i.e. vision, outcomes, objectives) and the rationale behind them.</p>	
Ongoing validation and development of Project Brief	<p>Final Stage 1 Report Prepared by Design Team Review by Client Team</p>	
Governance and Approvals	<p>The client requirements should include stage 1 brief validation, project business case and any stage completions- authorise project to commence to the next stage.</p> <p>Validate consultant/ contractor recommendations against the client requirements and gateway requirements.</p>	

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STAGE DETAILS	STAGE BASED VALIDATION	CHECK YES/NO
Confirm & approve Project Brief	Approved Brief having ensured the changes have been cross checked with project vision and objectives/ business case and budget. The stage 1 report has also been signed off.	
Ongoing validation to ensure achievement of project outcomes and objectives: regularly check and gain assurance that emerging design is addressing all Project Outcomes & Objectives	There is an agreed process for validation , and it has been applied.	
Project Business Case - prepare, maintain and obtain required approvals	Project (FBC) Business Case updated/ maintained and approved (justifying the project's value with detailed costs, benefits, and risks etc as a sound and viable investment)- taking into account considerations set out in Stage 0.	
Approve Stage Reports & Stage completion	Approved Stage Reports & Stage completed - defined the stage outcomes/ high level statements of the core outcomes expected at the end of each stage.	
Authorise Project to commence next Stage	Gateway Validation - Authorised Project to commence next Stage with an agreed and understood process and criteria.	
Approve Tender Recommendations for appointment of consultants and contractors	Consultants' appointments approved.	
Arrange & participate in Gateway Reviews	Consultants/ specialist advice/ contractor teams participated in Gateway Reviews .	

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STAGE DETAILS	STAGE BASED VALIDATION	CHECK YES/NO
	Consultants/ specialist advice/ contractor teams' involvement is accounted for in their scopes of service and terms of engagement/ appointments and details of responsibility	
Project Management		
Project Execution Plan (PEP) - prepare & maintain	<p>The client team has contributed to the 'robust' Project Execution Plan (PEP).</p> <p>This is the 'project's management plan'- the processes and protocols to be used to develop the design. Client/ project manager and principle/lead designer collaboration. A spreadsheet (rather than a report) will provide a database that can easily be expanded and tested (as the project develops).</p>	
Project Programme - prepare, monitor and update	<p>The client and team have contributed to and prepared/ monitored/ updated the Project Programme.</p> <p>Established via a workshop session and set out the overall period/ sequence in which tasks must be carried out- covering all plan of work stages (0-8) briefing, design, construction and post completion activities of a project.</p> <p>The programme defines the interrelated projects that are required to complete the overall building, including a number of interrelated programmes are required (client/ operational and evaluation) for example.</p> <p>This is a tool that can help plan activities, monitor progress and identify where additional resources may be required, for example.</p>	

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STAGE DETAILS	STAGE BASED VALIDATION	CHECK YES/NO
Project Report - prepare (monthly) project reports, providing status update, identifying risks and issues to inform Client decision making	<p>Project Reports/ End of Stage Reports completed and issued.</p> <p>The reporting should be aligned with the programme and budget/ cost planning and sufficient time allowed for in consultants programme and scope of services to review and validate the reports.</p>	
Project Cost Reports/End of Stage Cost Plans	<p>Project Cost Reports completed and set out to the client requirements (what costs are to be included and who contributes to establishing these costs).</p>	
Approval of Design Reports and authorise project to move to next Stage.	<p>Design reports approved and necessary authorisation to move to next stage given by those nominated (lead designer?) and appointed by the client the responsibility for design process and approval.</p>	
Attend meetings as detailed on Meeting Schedule	<p>Project Meetings attended (with those attending clear of the resource requirements and that these have been built into scopes of services) and recorded.</p>	
Building in Use/ Plan for Use		
<p>Incorporate Feedback from lessons learned on previous projects or from the existing building's Facilities Management team into the Project Brief.</p> <p>Establish measurable targets for environmental performance, amenity and comfort in the Project Brief (e.g. metered energy and water consumption).</p> <p>Set out the requirements for Post Occupancy Evaluation, handover and Aftercare, maintenance and Facilities Management within the Project Brief, taking whole-life costs into consideration.</p> <p>Agree a schedule of Project Stakeholder engagement for Stages 2 and 3, as part of the Project Execution Plan.</p>		

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STAGE DETAILS	STAGE BASED VALIDATION	CHECK YES/NO
Identify a consultant within the Responsibility Matrix to take on the role of Plan for Use champion to maintain the focus on Project Outcomes throughout the project.		
N/A		
Risk Management		
Set up Risk Management Strategy- including Optimism Bias assessment	Risk Management Strategy established with a clear methodology and process that allows risk management to be executed by the design team and other specialists (including defined workshop schedule at key stages throughout the project lifecycle	
Prepare & Maintain Project Risk Register, review and update at monthly intervals	Project Risk Register prepared/ reviewed etc and includes all significant risks, financial impacts of the risks are understood, the importance or risks, risk exposure is identified and a process for reduction, cost effective risk control measures are implemented and control measures are reviewed and managed to close out risks- for example.	
Attend Risk Workshops & reviews, contribute to Project Risk Register	Attended (by those in the project team allocated and run to an agreed process) Risk Workshops & reviews , contributed to Project Risk Register	
Design	The client brief with all the stakeholder requirements, format and arrangements for design reviews, stage design proposals are identified is available for the consultants' appointments alongside design responsibility and co-ordination.	
Prepare Design Responsibility Matrix	Design Responsibility Matrix prepared- where design responsibilities are clearly defined- stages 1-7 and address design co-ordination fully across the team. The design responsibilities been clearly defined and properly understood (strategic at level 1 and fine-tuned at end of Stage 2) before tender documentation is prepared or appointments made. Does it form part of the EIR (If BIM is adopted)	

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STAGE DETAILS	STAGE BASED VALIDATION	CHECK YES/NO
Stakeholder, client engagement	Client Stakeholder Engagement Strategy established and completed (which may have used the Briefing and Evaluation workshop sessions to collate details).	
Prepare Accommodation Schedule (utilisation) from Client Brief and client requirements	Accommodation Schedule (utilisation) prepared from the client brief and requirements that will maximise the use of the building and create user friendly management and maintenance design.	
Consider and advise on opportunities for Modern Methods of Construction (MMC)	Opportunities for MMC reviewed including MEP and offsite for example.	
Space Planning (including adjacencies, flow, etc)	Space Planning completed that include detailed design studies and cost evaluations to ensure the planning/ building regulations are aligned with engineering and MEP.	
Develop and confirm ICT strategy	ICT Strategy confirmed with input from FM advisors.	
Information Management	Have you defined the Information Management requirements for each stage?	
Prepare Exchange Information Requirements (EIR)	EIR prepared to an agreed specification of the information requirements that are to be met throughout the delivery phase of an asset. This includes the acceptance criteria of the information standards, information production methods and procedures. Specifically includes Project Information Requirements and Asset Register- project level and detailed information and the appointing parties required.	
Prepare Standard Information Management Plan (SIMP)	SIMP prepared and to a format to allow information to be collected.	
Statutory Consents		
Planning Undertake a Site Appraisal (urban design analysis or character appraisal as appropriate). Source pre-design Planning Advice to identify local planning policy related Project Risks to be considered in Feasibility Studies. Use Feasibility Studies to test the Project Brief against the planning constraints of the site and to verify that Quality Aspirations can be achieved. Confirm the requirement for, and scope of, an Environmental Impact Assessment, listed building consent, required consent formats (outline or		

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STAGE DETAILS	STAGE BASED VALIDATION	CHECK YES/NO
full), and appropriateness of a planning performance agreement. Develop a planning brief incorporating planning policy principles, the planning strategy, and Project Stakeholder consultation methodology, to inform the Project Brief. Identify planning expertise required (e.g. planning consultant, landscape architect, ecologist, archaeologist, transport consultant), include it within the Responsibility Matrix and appoint consultants.		
Undertake strategic appraisal/ place standards review to inform statutory requirements	Strategic Appraisal undertaken with all parties to establish the statutory requirements.	
Health & Safety	Set clear health and safety objectives, have clear scopes of services and task requirements for all duty holders, have you asked the team to demonstrate health and safety skills, knowledge and experience/ defined the PIP information in the SIMP - common format for the information. Established a clear approach to assessing competencies. The client is aware of their responsibility to accept the Health and Safety plan and have they set out clear requirements in the appointment documents?	
Contribute to Health & Safety Strategy as required and to delivering the project in a safe manner. Provide all necessary information to the Principal Designer and comply with the CDM Regulations 2015.	Complied with the Health and Safety Strategy with information from the Principal Designer including resource requirements, responsibilities and specialist advice requirements.	
Appoint Principal Designer	Principal Designer appointed with design responsibility clearly defined along with the relationship/ coordination with consultants' team.	
Assess the competence of Consultants & Contractors	Competence of consultants/ contractors considered and assessed.	
Building Performance		

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STAGE DETAILS	STAGE BASED VALIDATION	CHECK YES/NO
N/A		
Surveys and Investigations		
N/A		
Cost		
Project affordability check	Project affordability checked against benchmarked costs.	
Prepare and analyse Cost Options	Cost Options prepared and analysed.	
Prepare and update detailed Elemental Cost Plan	Elemental Cost Plan prepared and updated. Where the costs of elements are broken down from the overall construction cost and benchmarked by the cost consultant.	
Prepare and update Cash Flow	Cashflow has been prepared and updated. Outlined when costs will be incurred and how much they will be during the life of the project.	
Carry out benchmarking report to confirm project brief and quality can be delivered within budget	Benchmarking Report completed that establishes target costs early and ensures design choices are aligned with the budget.	
Develop a contingency development strategy for the project	Established contingency development strategy that sets out a strategic overview of the actions and resources that will be used to deal with unforeseen events or situations that may affect the projects performance or outcome.	
Procurement & Award	Does the procurement strategy address the requirements of the project-deliver consistency of personnel, represent the values and ethos of the project, who is responsible for key tasks and design activities and cover reporting, payments, for example.	

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STAGE DETAILS	STAGE BASED VALIDATION	CHECK YES/NO
Review procurement options	Procurement Options established and ensured that sufficient consideration of the model as well as the procurement process options have been taken into account and allow the design team to be properly procured.	
Contractor Procurement Options Workshop	Contractor Procurement Options Workshop held, looking at the Pros and Cons of each route option.	
Administer Procurement process,	Procurement Process administered with clear outline of questions and engagement with the client/ client team.	
Respond to tender queries	Tender Queries are collated. This task is allocated to project team members with responsibility.	
Procurement Recommendation Report	Procurement Recommendation Report concluded to an agreed proforma.	
Procure Site Surveys & Investigations	Site Surveys and Investigations procured (and allocated in the budget)	
Prepare tender documentation/Works Information/Employer's Requirements	Tender documentation/Works Information/Employer's Requirements confirmed using a checklist.	
Attend Post Tender Interviews (as required)	Post Tender Interviews attended. This task is allocated to the project team member(s) with responsibility.	
Quality	Is a quality approach embedded into the client requirements?	
Develop, maintain and implement Client Construction Quality Plan	Client Construction Quality Plan defines the questions and actions.	
Retain 'ownership' of design quality throughout the project stages, maintain the 'Golden Thread'.	Quality Culture (CQIC) embedded in the Client Values and Culture and 'golden thread' fed into client requirements.	
Environmental Impact Assessment	Has the client defined sustainability objectives or aligned with the principles of the National Planning Framework?	

Transforming the Value of Consultancy (TVC) Initiative

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STAGE DETAILS	STAGE BASED VALIDATION	CHECK YES/NO
Support the achievement of the client's sustainability objectives and the Scottish Government's commitment for Scotland to become a net-zero society	Sustainability Objectives established and embedded into the project's Smart Objectives and brief as well as how they are measured.	
Commissioning Testing & Handover	Has the commissioning strategy been established at the start of the project and the information requirements defined in the SIMP?	
Develop Project Commissioning Strategy	Project Commissioning Strategy established and embedded in the client requirements.	

ADDITIONAL INSIGHTS- Defining Project Requirements

<p>Project Requirements: Vision/ Outcomes/SMART objectives</p> <p>These processes can be applied to strategic reviews, masterplanning or specific projects.</p>
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Stage Details	Roles	Support and Contribution	Activity and Output	Validation
Identify National statutory obligations and guidance affecting the project (e.g. relevant legislation, funding options, National Performance Framework, Learning Estate Strategy)	Client Team	Planning / Design Specialist	Desk research- Collated record of relevant resources for: <ul style="list-style-type: none"> • Implementation (statutory / regulatory) • Incorporation into the brief (non-negotiable metrics, e.g. LEIP targets) or • Further discussion (guidance to be applied bespoke to the project, e.g. NPF) 	
Identify regional and local statutory obligations and guidance affecting the project (e.g. LOIP, LDP, planning, transport, conservation)	Client Team	Planning / Design Specialist	Desk research – As above, at the regional and local level	
Identify and map potential stakeholders and keep list up to date throughout brief development (Includes identifying their likely communication and engagement requirements)	Client Team	Vision Champion/ Briefing Specialist supported by Engagement Facilitator	Database- Long list of all likely stakeholders and contact details, which can be rationalised as the briefing process proceeds. A spreadsheet format is useful so each stakeholder can be categorised by type (e.g. key decision makers / executive level; statutory; service users; community) and level of interest / communication needs	Database
Conduct place-based review to understand local opportunities and challenges, root the project in	Client Team	Vision Champion/	Guidance available from the SFT Place Guide .	Report

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the local context and begin early conversations with key stakeholders if appropriate		Briefing Specialist, Engagement Facilitator	This process will generate a report, with detail depending on the level of analysis undertaken. It is likely to include some or all of the following: <ul style="list-style-type: none"> • Narrative of the key challenges and opportunities • Stakeholder (service provider) feedback • Mapping of relevant assets 	
Review learnings from previous projects / POEs (This can be done at several points through the project, as plans become firmer)	Client Team	All Parties (cost, programme, quality, design etc)	Note points of interest or relevance to the project	Checkpoint at each stage gateway
Conduct visioning workshop with key decision makers (This establishes the high-level aspirations, challenges and opportunities for shared value from all key stakeholder groups, particularly those who will deliver services in the building)	Vision Champion/ Briefing Specialist	Engagement Facilitator Client Team	A clearly articulated vision comprising a few sentences that position the purpose, context, scope and high level aspirations for the project – what, why, and for whom?	Collate, analyse and distribute outputs to attendees. Report for comment/v alidation
Conduct strategic outcomes and SMART objectives workshop(s) with key decision makers and service providers (This develops the vision into measurable, relevant outcomes to guide the	Vision Champion/ Briefing Specialist	Engagement Facilitator Client Team	Approximately five to 10 strategic outcomes – the key themes that the project needs to address, agreed by all key stakeholders who will provide services.	Collate, analyse and distribute outputs to attendees.

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project. It may be possible in one workshop for less complex projects or those with few stakeholders)			Each outcome supported by a series of SMART objectives that detail how the project needs to perform to achieve the desired outcomes	Report for comment/validation
Prepare and sign off brief and feed into client requirements	Client Team	Vision Champion/ Briefing Specialist	The brief should clearly outline the process followed above to indicate who has been consulted, what were the outputs (i.e. vision, outcomes, objectives) and the rationale behind them.	Brief to be integrated into client requirements and aligned with other Stage Details and Strategies. Validated by Client Team

Ends