

The background of the image is a detailed architectural drawing, likely a floor plan, overlaid with a semi-transparent blue filter. A hand is visible in the lower right, holding a red pencil and pointing towards the drawing. A blue ruler is positioned in the upper left corner. The overall scene suggests a professional design or engineering environment.

# How to Appoint the Right Design Team

The key steps and considerations for the successful appointment of a design team

provelio



# How to Appoint the Right Design Team

Jeremy Sneddon, Director

Provelio

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# Introduction

If you're part of a client organisation responsible for a capital project or a change management programme, you need project management to ensure that you get the right results, on time and within the agreed budget.

Good project management fosters efficient, collaborative working between the client, their advisers and contractors. This should be orchestrated by the project manager, who is responsible for planning and communicating what needs to be done, in which order and by whom.

In order to promote an understanding between all participants in a project, we have produced a series of booklets that describe how key elements of every project should be managed.

There is no doubt that the selection of a design team has a significant effect on the success of a project. As a project manager, I have had the privilege of working with a number of first class design teams, who have helped make the whole project run smoothly and without delays, surprises and additional costs. I have produced this booklet to set out the key things that you can do as a client to assist in getting the right design team for your project.

Best wishes,

A handwritten signature in black ink that reads "Jeremy Sneddon". The signature is written in a cursive, flowing style.

**Jeremy Sneddon**

# The importance of selection

A good design team is vital to the success of your project. Their purpose is to make sure that all of the objectives in your brief are translated into a design that can be implemented practically. They must ensure that you have the right content, quality, budget and programme.

Design is a significant skill, but equally important is the ability to communicate effectively. It is by listening and talking to people that a good design team comes up with good workable design proposals. It is not enough for them to be good at their individual design disciplines. The emphasis should be on being part of a supportive TEAM.

This should be one of the key areas that you should take into account when you are putting together a design team

The degree to which they understand your requirements and have the experience to deal with it has an enormous impact, not just during the initial construction, but for decades afterwards. They must understand the impact that they have on the ongoing management of the facilities and the whole life costs of the asset they are designing for you.

# The two influences on design team selection

Considering the procurement route early can be an important and productive way of getting the project off to a flying start.

Your choice of design team is affected by two major things:

## **1. What are you trying to achieve?**

This is set out in a brief for the project (refer to the separate report ‘The Five Golden Rules for Preparing a Brief for your Project’)

## **2. What procurement will you use to deliver your project?**

You will need to carry out an option appraisal (refer to the separate report “How to Select the Right Procurement Route for your Project”)

The brief will determine whether the project is large or small; new build, extension or refurbishment; standard quality or unique, and so on. There is no point appointing a design team that specialises in small projects if you will be undertaking a multi-million pound project.

The procurement route appraisal will set other parameters for your design team. For example, do you want an architect that can stay with you from inception to completion or do you want a concept architect who can hand over to a design and build contractor to prepare the detail?

# The role of your project manager in appointing the design team

Your project managers (whether they be internal or external appointments) are the right people to advise you on the appointment of a design team.

They need to ask two key questions:

1. What type of design team members do you need? Typically, there will be an architect, structural engineer, mechanical & electrical engineer and quantity surveyor. You may also need specialists such as acoustics or traffic engineers, etc.
2. Which specific person or companies should be considered for each of the available positions in the design team structure?

You should NOT give your project manager a free-hand to appoint whomever they want.

This goes against the grain of an open book approach. Most reputable firms of project managers would advise you to consider a range of options which they will explain to you in order that you can make the final decision.

Your project manager should therefore come up with a shortlist of practices or companies that you should consider together with advice on the method of selection that they recommend.

# The key factors for shortlisting

Your project manager should consider the following criteria when shortlisting design team members:

1. Do they have a good match of experience with the work required in your brief (and using the procurement route you are likely to use)?
2. Do they have a reputation (and proof) for delivering similar projects well?
3. Does your project manager have personal experience of working with them?
4. If not, can other testimonials or proof be obtained?
5. Do they have the right standing with regard to membership of relevant professional institutions?
6. Are their systems for ISO 9001, ISO 14001 etc. registered with (and audited by) third party organisations?
7. Do they have the staff resources to handle the appointment?
8. Do their systems and technology comply with modern best practice and efficiency?
9. Do they have the financial standing and appropriate insurance to handle your project?
10. Will they have the right “chemistry” with other members of your design team and project team?



# Experience and constraints

Your project manager's involvement in the appointment of the design team should be carried out in conjunction with you as client. If you want minimal involvement, you can delegate the whole process. In any event, you should ask your project manager to make recommendations for your final decision.

The main differentiating factor is the scale, experience and nature of the client organisation and the people that work in it. If you are in an organisation that does not regularly build or usually outsources everything, the chances are that you will be happy to delegate this decision.

If, however, you or your organisation are expert clients, then not only will you have an invaluable part to play in design team appointments, but you may have some specific constraints and restrictions that must be applied to appointments. For example, the choice of the design team may be limited to those organisations which are on an approved list or framework agreement set up by your organisation.

Your project manager should be prepared to work within these constraints, but also has a duty of care to raise a query if they feel that the constraints are not in the best interests of you as the client. In this case they should explain why and set out their recommendations for overcoming the problem – such as appointing somebody that is not on the framework agreement.

The main point here is that you and your project manager should communicate very well and openly on this process.

# Tender documents

When you have agreed a shortlist of potential firms with your project manager, the next step is to prepare tender documents for each discipline. (The chances are that they will not all be done at the same time. For example, it is common for architects to be appointed first in order that you can discuss recommendations for other disciplines with them and have them join you in the selection process).

Your project manager will prepare the tender documents on your behalf. This will include:

1. A brief.
2. Details of the form of contract and conditions of engagement, including any amendments to standard clauses.
3. Contact details for the tendering process.
4. Instructions on the information that must be provided in the tender.
5. Details on how they should set out their pricing.
6. The timing and process after submission of tenders.

If you are part of an expert client organisation, you may have your own standard appointment documents. Otherwise, you should ask your project manager for their recommendations.

# Evaluating tenders

It is important that you are protected as a client when tenders are received. The process must be open and above suspicion. It is the first duty of your project manager to ensure that tenders are received on or before the due date, opened at the prescribed time and submitted strictly in accordance with the instructions set out in the invitations to tender.

Any tenders that do not fully comply should be ruled out prior to evaluating the remaining tenders and the firms involved should be contacted accordingly. When you have a group of tenders that are fully compliant they will be evaluated by your project manager. It is likely that you will agree that your project manager will work in conjunction with other members of the project team to carry out an evaluation.

Your project manager will use a weighted scoring method to evaluate the qualitative aspects of the tender against a set of pre-agreed criteria. When this is done, they will take account of the price. The quality of service can vary considerably, so the financial evaluation can often be more about value than price.

For this reason, your project manager should provide you with a detailed tender report explaining their findings and the reasons for any conclusions that they draw from the tenders. It should end with a clear recommendation about the actions you should take.

# Interviews

There are two ways of dealing with interviews for design teams. If, for example, there are six tenders, some people like to interview all of the candidates and use this as a part of the overall evaluation. Other clients prefer to carry out the evaluation, narrow it down to two or three candidates and then use the interviews as the final stage of making the selection.

This often depends on the nature of the project and the tenders that you receive so it is best for you to discuss this with your project manager.

Your project manager will manage the interviews for you, including:

1. Preparing invitations to the firms.
2. Recommending who should be part of the interview panel.
3. Providing a brief for the interview panel about how to conduct the interview.
4. Preparing evaluation forms.
5. Co-ordinating a list of questions prior to the interview day.
6. Chairing the interview.
7. Chairing the post-interview discussion.
8. Setting out the final recommendations.

# Informing all applicants

Immediately after the decision has been made, your project manager will:

1. Advise the successful candidates of the intention to appoint them (by telephone).
2. Advise the unsuccessful candidates that they will not be appointed (by telephone).
3. Send the letters and appointment documentation to the successful candidates.
4. Send letters to the unsuccessful candidates.

The firms that submit tenders have gone to a lot of time and expense, so it is important that they are treated promptly and courteously during the appointment process. This means that they should be told as soon as possible, whether they have gone to the next stage or been appointed.

Another thing to be dealt with is feedback to unsuccessful applicants. This is compulsory in some organisations (particularly the public sector), but in any event it is a matter of courtesy and good practice. Feedback should be handled sensitively and in a way that does not lead to your process being challenged as unfair. Your project manager should manage this on your behalf.

# About Provelio

In our experience, most organisations in both the public and private sectors have the same broad objectives, which are:

*To deliver their core services and control their three biggest assets (and costs), which are people, buildings and technology*

To achieve these objectives, it is sometimes necessary to carry out a capital project or a change management programme.

We provide professional management services to carry out such projects, ensuring that our clients can go through this transition phase as smoothly as possible, whilst being able to carry out 'business as usual'. These services include:

- Strategic Management
- Project Management
- Change Management
- Cost Reduction
- Procurement and Contract Management

We believe that management is not just about processes and best practice. It is about fostering good, motivational relationships between people. We therefore deliver management solutions with integrity, transparency, clarity and a constructive style.

You will find more details and a substantial number of downloadable guidance notes from our website:

**[www.provelio.com](http://www.provelio.com)**





# How to Appoint the Right Design Team

Appointing the right design team is important to the successful outcome of any project, so it is worth taking great care during the selection process.

Assembling a team involves considering people skills as well as technical skills so that everybody can work together efficiently as a team.

In this booklet, Jeremy Sneddon, a director of Provelio Limited, sets out the key points for appointing a design team, step-by-step, including:

- The key factors for shortlisting
- Dealing with constraints
- Tender documents
- Interviews
- Appointments

Jeremy's advice comes from his extensive experience as a project manager, leading design teams on major capital programmes and delivering great results for the client.