

Guidance: The following criteria for services that are either general or for different stages of the RIBA 2013 Plan of Work apply to project management services that may be required to deliver capital infrastructure investment projects. DIO MPP PMs should consult with their relevant DIO MPP Dep Hd to determine the level of services required for funded TLB programmes identified in the CIDP. De-selection of a tasks must be fully justified and all DIO MPP PMs are required to comply with mandatory tasks identified with a ☹ symbol.

3.0	RIBA Stage 3 - Developed Design		Action
<input checked="" type="checkbox"/>	3.1	Review and comment on the preparation and progress of the Developed Design, Site Information, Project Information and Cost Information to ensure it is developed in accordance with the Project Strategies, Design Responsibility Matrix, Information Exchanges and the Design Programme and Project Budget.	REDACTED
<input checked="" type="checkbox"/>	3.2	Review and update the Sustainability Strategy and the Maintenance and Operational Strategy and lead and manage the Sustainability Checkpoint.	REDACTED
<input type="checkbox"/>	3.3	Review and update the Handover Strategy and Risk Assessments.	REDACTED
<input checked="" type="checkbox"/>	3.4	Review and update the Construction Strategy and Health and Safety Strategy.	REDACTED
<input checked="" type="checkbox"/>	3.5	Review and update the Project Execution Plan (PEP).	REDACTED
<input checked="" type="checkbox"/>	3.6	Review and update the Project Programme and the Project Budget.	REDACTED
<input checked="" type="checkbox"/>	3.7	Agree with the Lead Designer the Design Responsibility Matrix, Information Exchange and Technology Strategy, all prepared by the Lead Designer. Agree the Cost Information, prepared by the Cost Manager.	REDACTED
<input checked="" type="checkbox"/>	3.8	Manage the Change Control Procedures.	REDACTED
<input checked="" type="checkbox"/>	3.9	Select and prepare a list of tenderers with the Contracting Authority.	REDACTED
<input checked="" type="checkbox"/>	3.10	Collate information from the Project Team and assemble the Employer's Requirements.	REDACTED
<input checked="" type="checkbox"/>	3.11	Collate and issue the tender documentation.	REDACTED


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☑	3.12	Lead the assessment of the tenders and prepare the tender report. The assessment should include the review and evaluation of the alignment of the design and specification, pricing and cash-flow, health and safety information, programmes and method statements etc. in each of the Contractor's Proposals with the Employer's Requirements set out in the tender documentation and the further review and evaluation of responses to any clarifications from the tenderers. The Supplier shall lead the evaluation and review of the programmes and method statements.	REDACTED
☑	3.13	Agree the detailed content and assist with the finalisation of the build contract documentation.	REDACTED
☑	3.14	Verify that the Contractor has all required insurances, collateral warranties, bonds etc. in place.	REDACTED
☑	3.15	Lead the assessment of the submission from the selected tenderer of designs and specifications, pricing information and cash-flows, health and safety information, programmes and method statements etc. to ensure alignment with the contract documentation (for pre-construction activities) and the further review and evaluation of responses to any Design Queries, clarifications etc. from the tenderer. The Supplier shall lead the evaluation and review of the programmes and method statements.	REDACTED
☑	3.16	Monitor and review the performance of the Project Team.	REDACTED
☑	3.17	Select one or more specialists, where appropriate to provide input into option design. Identify and manage Construction Site Personnel for pre-construction works.	REDACTED
☑	3.18	Contribute and present to the Contracting Authorities Project Assurance Group (PAG).	REDACTED
☑	3.19	Collate reports, evidence, contribute and present at Gateway Review 2A and 3.	REDACTED

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☑	3.20	Discuss with the Contracting Authority the completion of all mandatory fields, schedule, cost and document upload for the Information Management System (IMS).	REDACTED
⊘	3.21	Agree with the Contracting Authority the timing and report format for contractor performance including bespoke reports required by the Client.	REDACTED
☑	3.22	Develop the Business Execution Plan in response to the Employers Information Requirement (EIR). Building Information Management (BIM) Data Drop 3.	REDACTED
☑	3.23	Complete a joint Assurance and Compliance check with the Contracting Authority.	REDACTED
☑	3.24	Provide support in the development of the Contracting Authority's Business Case and manage the scrutiny approval process, achieving a successful outcome.	REDACTED
☑	3.25	Update benefits map. Update benefits management strategy. Update benefits realisation plan. Update benefits profiles.	REDACTED
☑	3.26	Undertake quality checks on project deliverables.	REDACTED
☑	3.27	Carry out all or any necessary design studies to approve Build Contractor's design proposals.	REDACTED
☑	3.28	Carry out all duties in connection with Town Planning Consultations.	REDACTED
☑	3.29	In consultation with the Client, agree the presentation of Project progress and attend Project Review Boards.	REDACTED
⊘	3.30	Undertake Learning from Experience exercise.	REDACTED
☑	3.31	Carry out a full site inspection/site survey of any existing fabric, finishings, fittings etc, and make recommendations for any specialist investigations or surveys, which may be necessary.	REDACTED
☑	3.32	Complete a project handbook for this stage of the project delivery.	REDACTED
☑	3.33	Provide support in the development of the Contracting Authority's recovery plan.	REDACTED

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	3.34	Collating, curating and controlling on behalf of the Contracting Authority all project information. Manage the update of Project Information in response to ongoing Contracting Authority Feedback.	REDACTED
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