

Managing Interior Design Projects

For Managers Commissioning Design Projects

DBA Guide Three
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This is one in a series of five guides prepared by the Design Business Association for managers involved in commissioning design projects.

Managing Interior Design Projects should be read in conjunction with the first guide in the series, 'Choosing and Appointing a Design Consultancy'. It covers key issues including: managing the use of external design resources; preparing an outline brief; assessing proposals; how design consultancies charge; agreeing terms of business; and copyright and intellectual property rights issues.

Other design management guides available in the series:

- Guide One – Choosing and Appointing a Design Consultancy
- Guide Two – Managing Corporate Identity Programmes
- Guide Four – Managing Packaging Design Projects
- Guide Five – Managing Product Design Projects

Orchestrating and Planning

Appointing a project manager

Apart from choosing the appropriate consultancy and establishing a clear brief (see below), a successful project also relies on clear project leadership and reporting lines.

As early as possible, usually before appointing the consultancy, select an in-house project manager who will be the point of contact for all those involved in designing and building the project.

Depending on the nature of the project and your company's own organisational structure, the project manager may be from the marketing or estates department. In many cases, both departments will be represented on the project team, but ultimately one should be designated to take the lead.

Putting a team together

Interior projects draw on many skills. The project team may include designers, architects, quantity surveyors, mechanical, electrical, heating, air-conditioning and ventilation specialists, and building contractors. It is important that the various teams meet at the earliest possible opportunity and that clear communications channels are established with one person from each team nominated as the primary contact. The client project manager should insist that minutes are produced for every project meeting, whether or not he/she is present, so that there can be no confusion over what has been agreed in terms of action, responsibility, and timescale.

If you are relatively inexperienced in managing interior design projects or if the project is fairly small it may be simplest to have the designer act as lead consultant and orchestrate the contributions of the other professionals. In this case it must be very clear whether the design fee proposal includes fees for ancillary services or whether these will be passed on to you as separate costs. If consultants pass on and mark up specialists' fees, you can normally expect the consultant to manage and accept liability for their work.

If you are going to select specialists you should choose teams who can work together. For large or complex projects look for evidence of past collaboration and informally check this with previous clients.

Co-ordination

Co-ordination and collaboration is particularly important in retail projects. Different design practices often work on the corporate identity, packaging, and interior design for a new retail concept. In this situation effective communication is key. It is important that all teams understand the fundamental design values that will run through the new concept and that they are all working to the same brief which clearly sets out their respective responsibilities.

The architect's role

If the project involves a new building or significant structural modification to an existing building there is likely to be an architect involved. It is important to make it clear whether the architects or designers have the lead role and what is expected from each party.

If the interior design group has architects within the team – and many do – it makes sense for one practice to handle both architecture and design. If on the other hand an independent architect is retained, their brief must recognise the involvement of interior designers. The earlier that involvement is initiated the better: early discussions on the functions and feel of a building's interior will help the architect and facilitate a good working relationship. Ending up with service cores or stairways in the wrong place for an interior concept can be expensive and damaging to the overall quality of a building. Conversely, architects and designers working together designing from the inside outwards can result in outstanding buildings.

In larger new-build situations the architects will almost certainly be the lead consultants. It is important that the design consultants recognise this but they should be given scope to maximise the opportunities presented by the building's interior.

Fees

Fees are charged in two ways for interior design projects. First and most common is the fixed fee. Here the design consultant will propose a scope of work and a fixed fee for that work. The 'fixed fee' may or may not be inclusive of costs for specialist services such as lighting design, textile design, presentation materials, repro graphics, and sketch models. It is unlikely to include travel and subsistence, deliveries, architectural models, photography, illustration, artwork or printing.

There are varying opinions on the treatment of costs, also known as rechargeable or re-billables, so insist on a clear statement of what is and is not included in the proposed fee.

Where other professionals and support services are not part of the fee, expect estimates for these costs if they are the designers' responsibility. This may not be possible in the initial proposal since it may not be clear until after a design concept has been agreed exactly what specialist input is needed. In this case consultants should submit costed proposals for work up to the end of concept development with guideline figures for later stages.

Orchestrating and Planning

The second basis for charging is as a percentage of contract value. Many design consultancies will only work on this basis for larger projects. The percentage charged will be subject to negotiation and will tend to be higher on small projects than large multiple outlet roll-out programmes, to allow for economies of scale. It will also depend on the scope of work expected from the designers, especially the extent of on-site supervision, and the quantity of detailed drawing work involved.

Percentage-based fees mean contract amendments and cost overruns can lead to higher fees. As with fixed fees, you need to be clear about what is and is not included in the fee.

Some consultants, especially on office projects, may take commission on procurement of furniture, carpets, lighting etc. The DBA code of conduct says: 'member must disclose to a client any financial involvement with suppliers or sub-contractors or similar third parties involved in the contract.' Ask your consultancy about its policy on this issue.

The Design Process – reviewing the brief

The initial outline brief given to the designers at the appointing stage will almost certainly need to be fleshed out before the project gets underway. A clear and comprehensive brief is the cornerstone of a successful project. The brief review is the time for you and your chosen design team to make sure that all the fundamental assumptions and objectives are understood and agreed.

The consultancy needs to know the thinking behind the brief so that they fully understand the commercial objectives of the project.

For example, take an interior design project within the leisure sector for a themed restaurant with bar area. The bar might have a highly defined objective: to hold patrons for between fifteen and thirty minutes before they are seated to guarantee sales of two drinks per customer. For this to work, the relationship between the restaurant and bar needs careful calculation. By including this sort of discussion in the briefing you can be sure to get the best from your designers. And remember: experienced designers can often offer fresh insights into your own business.

Use the brief review to ensure that all parties are clear about:

- the commercial and technical objectives of the project
- target users/customers
- the project's merchandise range or service level
- technology requirements
- statutory consent/compliance requirements
- the total budget for the project.

It is worth reviewing the budget at this stage just to ensure that all costs have been taken into account and sufficient funds are available. It is easy to overlook details such as: graphics package for a restaurant; the cost of business lost while refurbishing; the cost of specialist computer writing; launch and promotional costs etc.

At this point the timetable should also be confirmed. To what extent must an existing business continue to function during refurbishment? The design may have to be 'phased' or staged to allow key activities to continue.

Finally, any meshing with other projects or company standards should be discussed and agreed. Company standards on, for example, workspace allocation, the standard of washroom facilities and the use of corporate colours can vary considerably. Not sorting out such details now can lead to cost and logistical problems later on.

Appointing a quantity surveyor

The quantity surveyor has become a central figure in the UK construction industry because of his/her value in quantifying the likely costs of a project, in signing off completed work for payment, in advising on contracting methods, and arbitrating between client and contractors should disputes arise. It is advisable to appoint a quantity surveyor for most projects, especially those of a significant size.

The quantity surveyor will charge a fee based on a percentage of the contract value. Most interior design consultants will welcome the presence of a quantity surveyor on the team if they don't already have one within their own organisation.

Research

It is increasingly common for research exercises to be built into interior design programmes.

Research can be undertaken:

- at the outset to inform the design brief at a later stage
- to test the design proposals
- or later still, to research reactions to a pilot site.

Typical research methods include:

- market research into consumer trends and preferences
- location analysis
- visual audits
- competitor analysis
- and functional efficiency analysis.

Where research is to be undertaken, build it into the project programme with sufficient time allowed for conducting the research, collating the findings, and feeding the conclusions back to the designers.

Designers should be involved in the process, so allow for the cost of their participation in the budget.

Finalising the brief

This may be as simple as a memo summarising the brief review and confirming that the original proposal accurately captured the brief. Or it may involve a substantial rewrite if research and discussion have thrown up new thinking that needs to be incorporated. Either way, the brief agreed at this point provides the benchmark against which the designers' later work must be assessed. It is therefore vital that you and your designers agree on the objectives, constraints and scope of work involved.

Once the brief has been finalised, any subsequent changes are likely to result in abortive work and probably additional fees.

Establishing responsibilities

Once the project brief is finalised the client project manager must prepare a list of all activities. For inexperienced managers, it may be useful to draft this with the design team. Against every activity should be the person and organisation responsible for it.

Everyone involved must be aware of their responsibilities and any deadlines. If the designers are applying for planning consent they need to know at the outset; if a specialist HVAC team is to be engaged they should be involved at an early stage; if a separate graphics package is to be produced the team should be identified and on-board, etc.

Once responsibilities have been allocated and agreed, the project plan can be drawn up: tasks, timings and resource requirements can be manually plotted onto a bar diagram or, more usually, entered into a computer-based project management or network analysis package.

Decision-making

When your consultants present their ideas in a concept review, consider:

- who should attend
- where the presentation should take place
- whether there will be people of sufficient seniority to make a decision or a recommendation that will be accepted
- whether all the attendees been thoroughly prepared and that they fully understand their roles and the brief
- what the concept presentation is trying to show
- the standard of the presentation you require (remember: the better the finish, the more costly it will be to produce)

Whether using a simple bar chart or network analysis to track project progress you should make sure that you allow time to make decisions. Getting internal approvals can be one of the most time-consuming activities in the whole programme. Be realistic about your internal processes so that the design team can plan around scheduled approval stages. Unscheduled delays for approval will cost money.

To ensure that things are proceeding to schedule and to spot problems early you should attend all project meetings, approve any decisions that have an impact on the cost, timing or appearance of the project and most importantly, hold the ring in terms of deciding who is responsible for what.

The Design Process – reviewing the brief

Brief, concise meeting notes issued after each progress meeting helps to ensure people are aware of their responsibilities. Never assume someone is doing something unless you have it in writing.

Insist that your consultants have a single person responsible for the management of their project with the authority to get things done. And do not hesitate to contact one of the consultant's principals if you feel things are not getting done. It is far better to act early than end up with expensive mistakes and possibly acrimonious disputes.

The Design Process – conceptual design

This is the first stage of the design process proper. During this phase the designers will explore different design directions that they believe will meet your brief. They will be working to establish a feel and a general approach rather than detailed solutions. They may wish to share some of their early thinking with you so that you can give pointers and reactions.

Concept review

At the completion of conceptual design the design team will wish to present one or more solutions. This will depend on various factors, ie: the nature of the project; the consultancy's way of working; your own wishes; and the extent to which preliminary meetings have been used to define concept direction.

Concepts can be presented in a number of ways: as illustrations and renderings; as simple sketch models made from card and sandwich board; as sketches; or even as computer-generated images in 2D or 3D. Often the presentation will also include 'feeler' boards, which use a pastiche of images and materials to conjure up the feel for which the designer is striving. There may also be a presentation of 'colours and materials' boards showing the intended colour palette and textures envisaged, although this part of the presentation may be deferred until 'Concept Selection' (see below).

Whatever this presentation medium it is essential that the design team be allowed to present its concepts in person. Only by doing this can they get accurate feedback and explain the thinking behind each concept.

Concept selection

By the end of a concept presentation, you should have a good grasp of the designers' thinking. Allow plenty of time for those being exposed to the design process for the first time to ask questions, understand the designers' logic and generally equip them to make a decision. If more than one concept was presented, it may be that there is one clear winner, perfectly meeting the brief and preferred by all, in which case it is decided to take this forward to detailed design immediately.

A note of warning: check that the most visually attractive concept actually meets the operational needs of the brief and stress the importance of this congruence to the whole of your team.

If two concepts appeal in different ways and/or almost meet the brief you may ask for further development and a subsequent presentation, after which a final decision can be made.

In the rare event that you like none of the concepts presented consider the following:

- Did the designers meet the brief functionally but in a way you found aesthetically unappealing? If so, you can ask them to do further work but they may require additional fees since they have delivered a workable solution that you dislike for purely subjective reasons.
- Has the brief changed and were the designers aware of this? Sometimes your view of the brief might change as your thinking develops. All too often this changed thinking is not fully or clearly conveyed to the designers and they continue working to the original brief. The watchword here is clear communication but if for some reason this situation does arise, then again the designers may well be justified in asking for additional fees to work up concepts for the revised brief.

If you are presented with concepts which do not meet the brief you should spell out to the designers exactly where they have failed and you are perfectly entitled to ask them to develop new and workable concepts within the original fee.

Agree concept direction

This is the formalisation of the end of the concept design phase where it is agreed to take one more concept forward to the next stage of detailed design.

Detailed design

Detailed design is the process of turning the concept into a workable design that can be executed on a specific site or sites. It involves the comprehensive specification of floor, ceiling and wall finishes, fixtures, lighting and services. It involves space-planning, layout and fire regulations compliance and, depending on whether or not the designers are working with architects or a facilities department, may involve building design, emergency access, and HVAC and M&E work. Again these responsibilities should have been spelled out in the brief.

Design freeze

Once the detailed design has reached a point where colours, materials, fittings and layout have been agreed, the design needs to be formally frozen. If the design is changed after this point it will certainly cost money and quite possibly delay the project.

The Design Process – implementation

Working drawings

Designs can drift away from the concept and the brief during construction so implementing the design requires good management and designer involvement.

If the design team has been asked to take the project beyond concept or detailed design the next stage of the design process will be the production of working drawings and shop drawings, sometimes known as 'rods'.

Working drawings will normally be plans, elevations and sections at a scale of 1:50 together with associated details drawn at an appropriate scale. These will be sufficient for a contractor to tender from but not detailed enough for shopfitters and other specialists involved in the manufacturing side.

Tendering

If the designers are expected to produce the tender package, including recommendations on tenderers and contractors, it should be stated either in the original brief or a supplementary brief together with details of associated fees.

The working drawings form the basis on which the contractors can tender or negotiate for the various elements of the construction and fit-out contract. There are a number of ways to approach this process. One is to choose your preferred contractor or contractors and negotiate a contract that fits your budget.

Alternatively, the drawing package can be circulated to a number of contractors who each submit competitive tenders. It is not unusual for design consultancies to produce the whole tender package, suggest tenderers and help select the winning contractors. This can be particularly useful if you are not experienced in these areas.

Appointing contractors

Here there is a fundamental choice to be made. Either appoint a managing contractor who will have overall project responsibility and will hire and be responsible for the various sub-contractors, or take on the project management yourself and appoint contractors for each element of the fit-out. The latter route demands specialist management skills and should not be undertaken lightly. If you decide not to use a managing contractor it is worth reiterating the value of the quantity surveyor who can also be retained in a project management capacity.

Shop drawings/rods

Contractors and shopfitters normally produce their own shop drawings which set out exactly how each part of a fit-out is to be made. Each contractor will have specialised plant, machinery and ways of working and can therefore produce shop drawings specifying production methods which make best use of their particular resources and keep production costs down. It is, however, essential that the designers monitor and sign-off the rods to ensure that the integrity of the design is maintained.

Site supervision

Site supervision may be handled by the design consultancy (if suitably qualified) or by a specialist project manager employed by the managing contractor, or by you. Whoever is in charge should be on the site daily. Assuming the design consultancy is willing and able to take on this role, this is often the best solution since it will ensure that design integrity is maintained as drawings are translated into three dimensions. Where the designer is not actually supervising the site, he/she should still be visiting it regularly. During this stage you must guard against the design being compromised by unauthorised cost-cutting or on-site amendments.

Not all design consultancies will wish to take on site supervision: check at the start of the project.

Pilot site fit-out and review

In the case of a one-off project or a roll-out without a pilot, the designer must be extra vigilant towards quality control. Thus it is important for you to react speedily to any concerns expressed by the designer so that problems are prevented before they become too expensive or impossible to modify.

When a design is likely to be 'rolled out' across many branches or locations it is wise to fit-out a pilot site first. Choose a site that provides a good test of build ability/usability and trading performance.

Don't expect everything in a pilot site to be perfect. The purpose of the pilot is for you and the designer to learn and incorporate that learning in the construction operation and design of future locations. Thus the review should be structured and comprehensive. It should include quantitative and qualitative assessments of the design's performance and should embrace both staff and, if serving the public, customers.

Finishes should be appropriate and durable, circulation and signage should work efficiently, lighting should be effective, and the whole thing should 'work'. If everyone has done their job well the learning should be in the details.

Hand over

In architectural projects the signing-off of completed work is a formalised process with built-in safeguards for the client. Interior design projects can sometimes be a little less tightly controlled, particularly if they are small. Nonetheless, it is worth insisting on procedures that require explicit approvals before contractors are paid and the project deemed complete.

Ideally the designer should issue interim and final payment certificates as the work progresses. These are signed by the designer and a QS and certify that a certain quantum of work has been completed and should be paid for. When the job is complete a completion certificate is issued. In most projects you will retain a standard percentage of the contract value for six months pending completion of defects listed on the 'snagging' list. These should be relatively minor things, since major defects should be rectified before the completion certificate is issued. This sort of documentation will be part of the standard working practice of most good consultancies: ask potential consultants to explain their documentation of jobs when they are pitching for work. It will tell you a lot about their professionalism.

Project review

When the excitement has subsided and the new offices occupied/shop trading/restaurant open or whatever, carry out a post-project review. This should answer three key questions:

- How well is the design performing, quantitatively and qualitatively?
- How well was the consultant-client relationship managed?
- How efficient was the design process on both the client and consultant's sides?

The results of this can be fed back into subsequent design projects.

Sources of Help and Advice

The organisations listed below are invaluable sources of information and advice in the design sector:

Design Business Association (DBA)

The DBA is the trade association for the UK design consultancy sector with around 300 members, providing design services across all disciplines. The DBA exists to promote effective design; to encourage high standards of professional practice within the design consultancy sector; and to provide useful services to members.

'designSelect' is the new on-line design referral service from the DBA. The service is free to members and provides design buyers with an expertly honed shortlist of appropriate consultancies within minutes. Visit designSelect at www.dba.org.uk.

The DBA International Design Effectiveness Awards is the only awards scheme to recognise and reward design projects that have achieved outstanding commercial results. For more information contact the DBA.

The Design Business Association
35-39 Old Street
London EC1V 9HX
T/ 020 7251 9229
E/ enquiries@dba.org.uk
www.dba.org.uk

Design Council

The Design Council works to help British industry understand the nature of good design and the positive effect it has on market performance.

Design Council
34 Bow Street
London WC2E 7DL
T/ 020 7420 5200

Sources of Help and Advice

Chartered Society of Designers (CSD)

The CSD is the UK's principal professional body for designers. In addition to its services for members it can provide information for design buyers.

The Chartered Society of Designers
Unit 5
Bermondsey Exchange
Bermondsey Street
London SE1 3UW
T/ 020 7357 8088

DTI

'The single market' – DTI provides an authoritative and comprehensive range of information on the single market. Contact Giles Holford Manager of Single Market Policy and Co-ordination on T/ 020 7215 4483.

'Innovation' – Future and Innovation Unit T/ 020 7215 6642 for information

Patent Office

'Patents, copyright and trademarks' – The Patent Office (an executive agency of DTI) can advise you on intellectual property rights, which protect design work created for products, packaging, interiors and trade or service marks T/ 0845 950 0505 for information.

Useful Publications

Offices – A Briefing and Design Guide: S Bailey, London, Butterworth Architecture, 1990
Fitch on Retail Design: R Fitch and L Knobel, Oxford, Phiadon, 1992
How to Buy Design: M Hancock, Design Council, 1992
How designers think London: B Lawson, Butterworth Architecture, 1990
Architect's Handbook for Client Briefing: F Salisbury, London, Butterworth Architecture, 1990
The Directory of Interior Design: DID SARL Paris, 1991
The International Directory of Architecture and Design: DID SARL Paris, 1992