



11 October 2022



Contents

| | |
|---|----------|
| Executive summary | 1 |
| Background | 3 |
| Overview of Framework Agreement | 4 |
| Framework Call-off Process | 8 |
| Appendices | |
| Appendix A - ITT Appendix C: Scope of Requirements Lot 1 Architect | |
| Appendix B - ITT Appendix C: Scope of Requirements Lot 2 Architect | |
| Appendix C - ITT Appendix C: Scope of Requirements Lot 3 Cost Consultant | |
| Appendix D - ITT Appendix C: Scope of Requirements Lot 4 M&E Engineering | |
| Appendix E - ITT Appendix C: Scope of Requirements Lot 5 Building Surveyor | |
| Appendix F - ITT Appendix C: Scope of Requirements Lot 6 Structural Engineering | |
| Appendix G - ITT Appendix C: Scope of Requirements Lot 7 Principal Designer | |
| Appendix H - ITT Appendix C: Scope of Requirements Lot 8 Property Consultancy Advice | |
| Appendix I - ITT Appendix C: Scope of Requirements Lot 9 Strategic Estates Advice | |
| Appendix J - ITT Appendix C: Scope of Requirements Lot 11 Project Management | |
| Appendix K - ITT Appendix C: Scope of Requirements Lot 12 Clerk of Works | |

Executive summary

Quality Trusted Solutions (QTS) have procured a Consultants Framework to cover Architects (medium/large, schemes greater than £2m project value, Architects (small/medium, schemes less than £2m project value), Cost Consultant, M&E Engineering, Building Surveyors, Structural Engineering, Principal Designer, Property Consulting Advice, Strategic Estates Advice, Project Management, Fire Safety Training ¹and Clerk of Works consultancy services.

Currie & Brown UK Ltd was appointed to facilitate the procurement via the ProContract electronic procurement portal. Through early discussions and approval with the project team a restricted procedure was deemed the most appropriate procurement strategy due to the capability to clearly define a specific need and scope of services required.

Through early discussions with the project team an evaluation strategy for the Selection Questionnaire based on organisational, financial and reference information (pass/fail or information only) and technical and professional capacity was agreed (weighted assessment).

Change of Scope and Resultant Programme Delays

Currie & Brown were originally appointed in mid-March 2021 to procure 6 lots via the Find a Tender Service, 5 lots via a below threshold procedure and 4 lots via a below threshold 'light-touch' procedure. QTS and CNWL discussions lead to multiple changes in scope which lead to the programme delays described in **Section 1.5** of this report. By the time of the republication of the Consultant Framework on 17 August 2021 the framework contained 12 lots.

The Contract Notice advertising the opportunity was published on ProContract on 17th August 2022 with the reference number DN543506 (2021/S 000-020072) . The process was controlled electronically using ProContract in order that a full electronic audit trail could be maintained.

The Invitation to Tender (ITT) was then designed to appoint consultants demonstrating the Most Economically Advantageous Tender (MEAT) in accordance with the award criteria set by the project team as shown below.

| Lot |
|---|
| Lot 1 Architects (Medium/large, schemes greater than £2m project value) |
| Lot 2 Architects (Small/medium, schemes less than £2m project value) |
| Lot 3 Cost Consultant |
| Lot 4 M&E Engineering |
| Lot 5 Building Surveyors |
| Lot 6 Structural Engineering |
| Lot 7 Principal Designer |
| Lot 8 Property Consulting Advice |
| Lot 9 Strategic Estates Advice |
| Lot 11 Project Management |
| Lot 12 Clerk of Works |

¹ Abandonment of Lot 10 Fire Safety Training, Lot 10 Fire Safety Training did not receive any SQ submissions. QTS decided to abandon Lot 10 and continue the process with 11 lots.

Suppliers are to pay a 0.5% levy at each successful call-off to cover the administrative costs of the Framework . Buyers shall access the framework through use of an access agreement and QTS will issue an access agreement number which the supplier must use on invoices. Supplier shall provide monthly return as to services contracted through this framework detailing trust, contact name and access agreement number. QTS will bill supplier quarterly for access levy.

Background

QTS is a wholly owned subsidiary company of Central & North West London NHS Foundation Trust. QTS is acting in its own right and for and on behalf of CNWL (the 'Authority'). QTS as the Authority is issuing this opportunity for both QTS and CNWL. Awarded suppliers will be authorised to provide services for both CNWL and QTS in connection with this 'Find a Tender Service Consultancy Framework'.

QTS was established in 2017 to manage the estates and facilities functions of CNWL across 150+ sites, and to market its services within the wider healthcare sector to deliver estates and facilities solutions across London and the South East of England.

CNWL remains QTS primary customer, and it engages QTS to deliver its annual capital programme of capital projects to its properties, with an average annual value of up to £15m. This investment is targeted at delivering major property improvements and upgrades to ensure patients and service users are cared for in a safe, therapeutic and comfortable environment.

This 11 Lot Consultants Framework will include the following disciplines to facilitate the delivery of QTS's new build and refurbishment schemes over the Framework's 4-year term:

- **Lot 1 – Architects (medium/large, schemes greater than £2m project value)**
- Lot 2 – Architects (small/medium, schemes less than £2m project value)
- Lot 3 – Cost Consultants
- Lot 4 – M&E Engineering
- Lot 5 – Building Surveyors
- Lot 6 – Structural Engineering
- Lot 7 – Principal Designer
- Lot 8 – Property Consulting Advice
- Lot 9 – Strategic Estates Advice
- Lot 11 – Project Management
- Lot 12 – Clerk of Works

Overview of Framework Agreement

2.1 The term of the Framework Agreement will be 4 years from the commencement date², with an expiry date on or around 28 April 2026.

Please contact Joel Glover, QTS, joel.glover@nhs.net

2.1.1 The framework comprises of 11 lots. Please see table below for supplier & lot allocation.

| Framework Lots | Framework Suppliers |
|---|--|
| Lot 1 Architects (Medium/large, schemes greater than £2m project value) | Corstorphine & Wright IBI Group Oberlanders |
| Lot 2 Architects (Small/medium, schemes less than £2m project value) | Floyd Slaski Architects Ltd Ansell & Bailey Oxford Architects LLP Stephen George & Partners Tangram Architects Ltd |
| Lot 3 Cost Consultant | Calfordseaden LLP Christopher Smith Associates LLP Currie & Brown Mehscc Turner & Townsend WT Partnership Limited |
| Lot 4 M&E Engineering | Butler & Young Hulley & Kirkwood Consulting Engineers JCA Group Troup Bywaters + Anders |
| Lot 5 Building Surveyors | Currie & Brown Ingleton Wood LLP The Fulker Consultancy Ltd |
| Lot 6 Structural Engineering | Clegg Associates Curtins Consulting Perega Limited |
| Lot 7 Principal Designer | Currie & Brown Playle & Partners LLP RPS Consulting Services Limited Turner & Townsend |
| Lot 8 Property Consulting Advice | Archus Ltd Essentia Trading Montague Evans Newsteer Limited |
| Lot 9 Strategic Estates Advice | Currie & Brown Essentia Trading Eventmap Turner & Townsend |

² See framework agreement under commencement date

Lot 11 Project Management

Currie & Brown
Gardener & Theobald LLP
Ingleton Wood LLP
Turner & Townsend

Lot 12 Clerk of Works

Currie & Brown
Hickton Consultants

2.1.2 Contact Details and Framework Agreement references are as follows:

| Supplier & Lot | Framework Ref | Project Lead | Email address of Lead | Telephone Number |
|--|---------------|----------------------|-------------------------------------|------------------|
| Lot 1 Architects (Medium/large, schemes greater than £2m project value) | | | | |
| Corstorphine & Wright | EST/JG/22/01a | Paul Thrussell | pthrussell@cw-architects.co.uk | 0113 213 5656 |
| IBI Group | EST/JG/22/01b | John Knape | john.knape@ibigroup.com | 07739 931206 |
| Oberlanders | EST/JG/22/01c | Mark Coffey | mc@oberlanders.co.uk | 0131 2259070 |
| Lot 2 Architects (Small/medium, schemes less than £2m project value) | | | | |
| Floyd Slaski Architects | EST/JG/22/02a | Hal Jones | | 020 39102400 |
| Ansell & Bailey | EST/JG/22/02b | Belen Francos-Taylor | bfrancos@ansellandbailey.com | 0207 3870141 |
| Oxford Architects LLP | EST/JG/22/02c | Matthew Balaam | MBalaam@oxford-architects.com | 0186 5329100 |
| Stephen George | EST/JG/22/02d | Steve Batson | s.batson@stephengeorge.co.uk | 0203 8331310 |
| Tangram Architects Limited | EST/JG/22/02e | David Whitehead | info@tangramarchitects.co.uk | 0207 3946487 |
| Lot 3 Cost Consultant | | | | |
| Calfordseaden LLP | EST/JG/22/03a | Steven Wakefield | swakefield@calfordseaden.com | 01702 548449 |
| Christopher Smith Associates LLP | EST/JG/22/03b | Mark Turner | Mark.turner@csa-qs.co.uk | 0208 9432157 |
| Currie & Brown | EST/JG/22/03c | Neil Brierley | Uk-tenders@curriebrown.com | 0207 0619000 |
| Mesh Construction Consultancy Limited | EST/JG/22/03d | Tim Molden | tim.molden@meshcc.com | 0203 5213495 |
| Turner & Townsend | EST/JG/22/03e | Clinton Green | clinton.green@turntown.co.uk | 07971 013041 |
| WT Partnership Limited | EST/JG/22/03f | Andrew Richardson | andrew.richardson@wtpartnership.com | 0203 9364211 |
| Lot 4 M&E Engineering | | | | |
| Butler & Young | EST/JG/22/04a | Mike Wetton | mike.wetton@bya.co.uk | TBC |
| Hulley & Kirkwood Consulting | EST/JG/22/04b | J Gordon McInnes | hk.london@hulley.co.uk | 01372 747047 |
| JCA Group | EST/JG/22/04c | David Johnson | d.johnson@jca.co.uk | 01438 847020 |
| Troup Bywaters + Anders | EST/JG/22/04d | Alan Newman | a.newman@tbanda.com | 020 75041418 |
| Lot 5 Building Surveyors | | | | |

| | | | | |
|------------------------|---------------|----------------|-------------------------------|--------------|
| Currie & Brown | EST/JG/22/05a | Neil Brierley | uk-tenders@curriebrown.com | 0207 0619000 |
| Ingleton Wood LLP | EST/JG/22/05b | Stuart Norgett | pqqmanager@ingletonwood.co.uk | 0207 6804400 |
| The Fulker Consultancy | EST/JG/22/05c | Richard Fulker | TBC | 0203 7355729 |

| | | | | |
|---|---------------|-------------------|-------------------------------------|--------------|
| Lot 6 Structural Engineering | | | | |
| Clegg Associates | EST/JG/22/06a | Richard Oswin | richard.oswin@cleggassociates.co.uk | 0122 5541088 |
| Curtins Consulting Ltd | EST/JG/22/06b | Stirling Higley | stirling.higley@curtins.com | 0207 3242240 |
| Perega Limited | EST/JG/22/06c | Rachel Davis | rdavis@perega.co.uk | 01483 565886 |
| Lot 7 Principal Designer | | | | |
| Currie & Brown | EST/JG/22/07a | Neil Brierley | uk-tenders@curriebrown.com | 0207 0619000 |
| Playle & Partners LLP | EST/JG/22/07b | Claire Kennedy | ckennedy@playleandpartners.co.uk | 0208 3006811 |
| Turner & Townsend | EST/JG/22/07d | Clinton Green | clinton.green@turntown.co.uk | 07971 013041 |
| RPS Consulting Services Limited | EST/JG/22/07c | Andy Childs | andy.childs@rpsgroup.com | 01636 557241 |
| Lot 8 Property Consulting Advice | | | | |
| Newsteer | EST/JG/22/08c | Jonny Stevenson | jonny.stevenson@newsteer.co.uk | 0771 0379006 |
| Montague Evans | EST/JG/22/08b | Bhavini Shah | tenders@montagu-evans.co.uk | TBC |
| Archus Ltd | EST/JG/22/08a | Shane Dineen | s.dineen@archus.uk.com | 0333 3449339 |
| Essentia Trading Ltd | | Tina Nolan | tina.nolan@etl.co.uk | 0203 9763000 |
| Lot 9 Strategic Estates Advice | | | | |
| Currie & Brown | EST/JG/22/09a | William Allan | uk-tenders@curriebrown.com | 0207 0619000 |
| Essentia Trading | EST/JG/22/09b | Tina Nolan | tina.nolan@etl.co.uk | 0203 9763000 |
| Eventmap | EST/JG/22/09c | Dr Barry McCollum | barrymccollum@eventmapsolutions.com | 0289 0236558 |
| Turner & Townsend | EST/JG/22/09d | Clinton Green | clinton.green@turntown.co.uk | 07971 013041 |
| Lot 11 Project Management | | | | |

| | | | | |
|---------------------------|---------------|----------------|-----------------------------------|--------------|
| Gardiner & Theobald LLP | | | | |
| Gardiner & Theobald LLP | EST/JG/22/11b | Tim Bates | t.bates@gardiner.com | 0207 2094312 |
| Currie & Brown UK Limited | EST/JG/22/11a | William Allan | uk-tenders@curriebrown.com | 0207 0619000 |
| Ingleton Wood LLP | EST/JG/22/11c | Stuart Norgett | pqqmanager@ingletonwood.co.uk | 0207 6804400 |
| Turner & Townsend | EST/JG/22/11d | Clinton Green | clinton.green@turntown.co.uk | 07971 013041 |
| Lot 12 Clerk of Works | | | | |
| Currie & Brown UK Limited | EST/JG/22/12a | William Allan | uk-tenders@curriebrown.com | 0207 0619000 |
| Hickton Consultants | EST/JG/22/12b | Laura Bradshaw | laura.bradshaw@hicktongroup.co.uk | 01226 743959 |

Framework Call-off Process

QTS intend to call off Framework Suppliers to perform contracts via the following Call-off Process as follows:

3.1 Direct award threshold

- a. For instructions below the direct award threshold, suppliers can be approached directly and single sourced.
- b. The Order Form is to be completed by both the Authority representative and the supplier.
- c. The Supplier is to provide a project / quote reference number which is to be used to identify the contract reference number.
- d. Once the completed Order Form has been received, it will need to be attached to the Purchase Order when the requisition is raised.

| Lot / Description | Direct award threshold |
|---|------------------------|
| Lot 1 Architects (Medium/large, schemes greater than £2m project value) | £250,000 |
| Lot 2 Architects (Small/medium, schemes less than £2m project value) | £100,000 |
| Lot 3 Cost Consultant | £100,000 |
| Lot 4 M&E Engineering | £100,000 |
| Lot 5 Building Surveyors | £100,000 |
| Lot 6 Structural Engineering | £50,000 |
| Lot 7 Principal Designer | £50,000 |
| Lot 8 Property Consulting Advice | £50,000 |
| Lot 9 Strategic Estates Advice | £50,000 |
| Lot 11 Project Management | £50,000 |
| Lot 12 Clerk of Works | £50,000 |

3.2 Requirements over the direct award threshold

- a. Mini competitions need to be undertaken based on a weighting split between commercial and technical as per the Award Criteria.
- b. The Procurement representative will advise on the tendering documentation to be utilised for this process.

Mini competitions will be evaluated on a number of, or all of, the criteria listed in this clause applies to all lots:

| Criterion | Weightings (Indicative) |
|--|-------------------------|
| Quality / Technical e.g. How would you bring technological innovation and sustainability opportunities to a project of this nature? e.g. How will you perform this service, what risks do you foresee and what mitigations are required? | 25%-50% |
| Time / Programme e.g. What agile processes do you have in place to ensure a rapid | 25%-50% |

| | |
|---|---------|
| mobilisation on the project? e.g. Please demonstrate how you will ensure programme certainty from point of appointment to commission completion? | |
| Cost e.g. Please provide a lump sum fee for this project. | 25%-50% |
| Social Value / Net Zero e.g. What specific training/employment/sustainability opportunities will you provide as a result of this project? | 5%-10% |

In addition, suppliers may be subject to, and required to pass, a Dun & Bradstreet credit score check prior to being awarded a contract on the following basis:

Minimum D&B score for 'Risk Indicator' of 3 i.e., pass = 'risk indicator' of 1, 2 or 3 and fail = 'risk indicator' of 4 or "-". Please note that appointment to the Framework is not a guarantee of work.

3.3 Order Form

3.3.1 The call-off contract is made up of the following components:

- a. the call-off terms and conditions set out in the Framework Agreement;
- b. a completed order form (see framework agreement);
- c. the applicable parts of the Specification and Tender Response Document set out in schedule 5 of the Framework Agreement, as may be supplemented by information set out and/or referred to in the order form;
- d. the applicable parts of the Commercial Schedule set out at Schedule 6 of the Framework Agreement, as may be supplemented by information set out and/or referred to in the Order Form.

3.3.2 You must also set out, as per schedule 7 of the Framework Agreement, the following:

- a. the award criteria to be used by Participating Authorities when placing Orders for services under the Framework Agreement. This should be consistent with the award criteria set out in the tender documents for establishing the Framework Agreement and/or that you used to award the Framework Agreement itself;
- b. the call-off processes and related ordering procedures, which should set out:
 - *as relevant, the processes for making both direct awards and awards involving there opening of competition;*
 - *how the award criteria should be applied in both of these instances;*
 - *in each instance, how and when an Order is placed using the Order Form referred to below. This should always be the final step in any ordering process adopted as this is the point at which a legally binding call-off contract is formed;*
- c. a template Order Form for use by Participating Authorities as part of the ordering procedure adopted. As envisaged by the call-off terms and conditions the Order Form should allow for the inclusion of the following details:
 - *The name of the Participating Authority and Supplier entering into the call-off contract;*
 - *Reference to the Framework Agreement and application of the call-off terms and conditions at Appendix 1 of the Framework Agreement;*
 - *Date of the Order.*
 - *Confirmation of the services being ordered;*

- *The term of the particular call-off contract;*
- *Date of the commencement of services where this is not the date of the Order Form and long-stop date;*
- *The name and contact details for the contract managers for each party, as relevant to the specific Order;*
- *The addresses of both parties for notices to be given under the call-off contract;*
- *Confirmation of the contract price for that order, as calculated in accordance with the Commercial Schedule set out in the Framework Agreement;*
- *Confirmation of the payment profile, i.e. whether this is monthly in arrears or immediately following completion of the provision of the services;*
- *Details of KPI's and associated service credits relevant to the Order, if any;*
- *Details of any implementation phase and associated implementation plan;*
- *If the Supplier is processing personal data, confirmation of whether the Supplier is doing so as a data controller or data processor;*
- *Details of or reference to any lease or licence being granted by the Participating Authority to the Supplier to enable it to provide the Services; and*
- *Other supplementary details relevant to the particular Order (in particular, any reference to the Participating Authority's requirements set out in any documents relating to a mini-competition and the Supplier's proposal).*

3.4 Framework Levy

- 3.4.1** Suppliers are to pay a 0.5% levy at each successful call-off to cover the administrative costs of the Framework . Buyers shall access the framework through use of an access agreement and QTS will issue an access agreement number which the supplier must use on invoices. Supplier shall provide monthly return as to services contracted through this framework detailing trust, contact name and access agreement number. QTS will bill supplier quarterly for access levy.

Appendices

Appendix A - ITT Appendix C: Scope of Requirements Lot 1 Architect

Appendix B - ITT Appendix C: Scope of Requirements Lot 2 Architect

Appendix C - ITT Appendix C: Scope of Requirements Lot 3 Cost Consultant

Appendix D - ITT Appendix C: Scope of Requirements Lot 4 M&E Engineering

Appendix E - ITT Appendix C: Scope of Requirements Lot 5 Building Surveyor

Appendix F - ITT Appendix C: Scope of Requirements Lot 6 Structural Engineering

Appendix G - ITT Appendix C: Scope of Requirements Lot 7 Principal Designer

Appendix H - ITT Appendix C: Scope of Requirements Lot 8 Property Consultancy Advice

Appendix I - ITT Appendix C: Scope of Requirements Lot 9 Strategic Estates Advice

Appendix J - ITT Appendix C: Scope of Requirements Lot 11 Project Management

Appendix K - ITT Appendix C: Scope of Requirements Lot 12 Clerk of Works

1. General

- 1.1 Monitor performance of consultants acting on framework commissions on an annual/end of project basis and report findings to the Client.
- 1.2 The scope of services follows the RIBA Plan of Work 2013. Any item not specifically referenced which is part of an Architects/Lead Consultants normal services is deemed included within the relevant work stage, including all necessary drawings, calculations, dynamic modelling, etc.

2. Services including:

- 2.1 General Architectural Services.
- 2.2 Specialist Architectural Services, including residential.
- 2.3 Interior Design.
- 2.4 Interior Space Planning Specialist Services.
- 2.5 Interior Fit Out.
- 2.6 Landscaping.
- 2.7 Specialist Medical equipment – pre–installation.
- 2.8 Fire Safety Compliance.

3. Stage 0 – Strategic Definition/Outline Business Case

3.1 Inception

- 3.1.1 Receive Client Briefing.

3.2 Define Objectives, Constraints and Criteria for Development

- 3.2.1 Establish the scope of the project in association with the project manager and disseminate to other consultants.
- 3.2.2 Undertake site appraisals.

3.3 Health and Safety File and Health and Safety Plan

- 3.3.1 Contribute to health and safety file and health and safety plan for construction phase.

3.4 Consider and Appraise Options

- 3.4.1 Co-ordinate and prepare in capital and works-related revenue terms feasibility studies to form part of appraisal of options.
- 3.4.2 Evaluate feasibility studies in capital and works-related revenue terms to form part of appraisal options.
- 3.4.3 Co-ordinate/Consult with local authority and other statutory authorities.

3.5 Risk Assessment and Contingency Allowance

- 3.5.1 Input into/Co-ordinate risk assessment and prepare report for project manager on contingency allowance.

3.6 Selection of Preferred Options

- 3.6.1 Re assess studies of preferred option.
- 3.6.2 Input into/Co-ordinate and submit report to project manager recommending preferred option.
- 3.6.3 Input into/Co-ordinate and submit outline business case report.
- 3.6.4 Prepare/Co-ordinate and agree development control plan (DCP) with project manager.

4. Stage 1 – Preparation and Brief

4.1 Receive client briefing.

4.2 Client Brief

- 4.2.1 Prepare and maintain detail programme and agree with project manager and other consultants.
- 4.2.2 Establish project organisation.
- 4.2.3 Develop project objectives, including quality objectives, project outcomes and sustainability objectives including other parameters or constraints.

4.3 Health and Safety File and Health and Safety Plans

- 4.3.1 Contribute to health and safety file and health and safety plan.

4.4 Initial Brief

- 4.4.1 Prepare and maintain detail programme and agree with project manager and other consultants.

4.5 Site Investigation

- 4.5.1 Co-ordinate work of this stage, confirm programme and report to project manager.
- 4.5.2 Determine extent of and contribute to supervision of site investigations. Agree and order site investigation in conjunction with other consultants.

4.6 Outline Design

- 4.6.1 Co-ordinate and prepare report on the recommended site in association with other consultants.
- 4.6.2 Prepare outline plans.
- 4.6.3 Provide services in connection with environmental studies.
- 4.6.4 Contribute to report on recommended site including constraints and opportunities.
- 4.6.5 Prepare zoning and strategic layouts.
- 4.6.6 Generate initial design studies.
- 4.6.7 Advise on energy conservation and assist in the determination of energy targets.
- 4.6.8 Input into/Co-ordinate work on initial design studies and supervise testing against planning control and constraints of cost, structure and services.
- 4.6.9 Co-ordinate and advice on energy conservation and determination of energy targets.

4.7 Planning Permission

- 4.7.1 Input into/Co-ordinate consultations with local authority and other statutory authorities and ensure that applications to obtain planning approval are made.

4.8 Development Control Plan (DCP)

- 4.8.1 Input into/Co-ordinate confirmation of development control plan (DCP) and agree with project manager including preparation of block plan of scheme identifying main departments and showing relationship with any earlier and possible further developments.
- 4.8.2 Co-ordinate preferred design and site development plans.

4.9 Risk Assessment and Contingency Allowance

- 4.9.1 Input into/Co-ordinate update of risk assessment and prepare report for project manager on contingency allowance.

4.10 Budget Costs

- 4.10.1 Input into/Co-ordinate preparation of cost plan.

4.10.2 Input into/coordinate information for budget cost statement and confirm to project manager that proposals can be afforded.

4.11 Post-project evaluation

4.11.1 Co-ordinate preparation of report on criteria for post-project evaluation.

4.12 Contract Strategy

4.12.1 Prepare report for project manager on contract strategy.

4.12.2 Agree schedule of services, design responsibility matrix, information exchanges and project execution plan.

4.13 Scheme Validation

4.13.1 Confirm to project manager that design meets functional content policy requirements.

4.13.2 Input into/Co-ordinate and prepare a report for the project manager to include any specific unresolved problems and to demonstrate that the scheme is cost effective.

4.13.3 Review the programme with the project manager.

5. Stage 2 – Concept Design

5.1 Design

5.1.1 Receive client briefing.

5.2 Full Brief

5.2.1 Update and maintain detail programme for this stage, co-ordinate work of other consultants and report to project manager.

5.2.2 Establish design co-ordination policy and maintain under review.

5.3 Health and Safety Plan and health and safety file

5.3.1 Update contribution to health and safety plan and health and safety file.

5.4 Concept design

5.4.1 Prepare concept design including outline proposals for structural design, building services systems, outline specifications.

- 5.4.2 Co-ordinate the work of other consultants in the development of the design, means of escape, compartments, room layouts and ensure that fire strategy, zoning and energy targets are complied with and that costs accord with the cost plan.
- 5.4.3 Co-ordinate consultations with local authority and other statutory authorities and ensure that applications to obtain final planning approval are made and statutory submissions commenced.
- 5.4.4 Agree material and construction specification.
- 5.4.5 Co-ordinate and verify that statutory submissions are made.

6. Stage 3 Developed design

6.1 Developed Design

- 6.1.1 Prepare/Coordinate developed design including coordinated and updated proposals for structural design, building services systems and outline specifications.
- 6.1.2 Detail co-ordination of construction, structure and services design and room layouts.
- 6.1.3 Input into/Co-ordinate information for checking design against cost plan. Take action on cost checking reports where necessary and agree final room layouts.
- 6.1.4 Monitor and co-ordinate preparation of production information, co-ordinate work of other consultants, maintain programme and agree when the production information is frozen.
- 6.1.5 Review and update sustainability, maintenance and operational and handover strategies and risk assessments.
- 6.1.6 Undertake third party consultations as required and conclude research and developments aspects.
- 6.1.7 Review and update project execution plan, including change control procedures.
- 6.1.8 Review and update health and safety strategy.
- 6.1.9 Review BREEAM compliance and BIM modelling.

6.2 Planning permission

- 6.2.1 Co-ordinate statutory submissions to obtain approvals.

7. Stage 4 – Technical Design and Contract

7.1 Receive client briefing.

7.2 Technical Design

- 7.2.1 Input into/coordinate preparation of technical design in accordance with design responsibility matrix and project strategies to include all architectural, structural and building services information, specialist sub-contractor design and specifications in accordance with design programme.
- 7.2.2 Input into/coordinate review and updating of sustainability, maintenance and operational and handover strategies and risk assessments.
- 7.2.3 Input into/coordinate review and updating project execution plan.
- 7.2.4 Input into/coordinate review and updating health and safety strategy.
- 7.2.5 Review BREEAM compliance and BIM modelling.

7.3 Tender documentation

- 7.3.1 Provide input to and monitor the production of tender documents.
- 7.3.2 Coordinate information for the Pre-tender estimate.
- 7.3.3 Co-ordinate update of risk assessment and re-evaluation of contingency allowance; report to project manager.

7.4 Select tenderers

- 7.4.1 Update and maintain detail programme for this stage, co-ordinate work of other consultants and report to project manager.
- 7.4.2 Receive tender lists from project manager and co-ordinate comments.

7.5 Contract documents

- 7.5.1 Co-ordinate production of contract documents.

7.6 Establish contract programme

- 7.6.1 Establish contract programme.

7.7 Post-tender estimate

- 7.7.1 Co-ordinate update of risk assessment and re-evaluation of contingency allowance; report to project manager.
- 7.7.2 Establish approved sum.

8. Stage 5 - Construction and equipment supply

8.1 Receive client briefing

8.2 Execution and control of works

8.2.1 Co-ordinate work of other consultants in carrying out post-contract and cost management procedures and report to project manager.

8.2.2 Co-ordinate compliance with local authority and other statutory authority procedures.

8.3 Health and safety file and health and safety plan.

8.3.1 Contribute to health and safety file and health and safety plan.

9. Stage 6 – Handover and Close out

9.1 Receive client briefing

9.2 Technical commissioning team

9.2.1 Co-ordinate technical commissioning team.

9.3 Technical commissioning programme

9.3.1 Collaborate in preparation of technical commissioning programme.

9.4 Record drawings and operational/maintenance manuals, health and safety files

9.4.1 Co-ordinate preparation of a set of record drawings and guidelines on the operation and maintenance of the building services for submission to the client together with the health and safety file when the project is completed and ready for handover.

9.5 Statutory certificates (fire etc.)

9.5.1 Co-ordinate the necessary submissions to enable the client to obtain fire and other statutory compliance certificates prior to occupation.

9.6 Certificate of practical completion

9.6.1 Co-ordinate preparation of certificate of practical completion.

9.6.2 Conclude administration of building contract.

10. Stage 7 – In use

10.1 Receive client briefing.

10.2 Final account

10.2.1 Co-ordinate preparation and agreement of final account in conjunction with the QS and QS.

10.3 Post-project evaluation

10.3.1 Co-ordinate and prepare report on post project evaluation.

10.3.2 Arrange post project evaluation meeting 3 months after completion.

10.4 Final Defects Inspection

10.4.1 Input into/coordination of 12 months defects inspection.

10.4.2 Ensure defects are identified and logged with the contractor. Ensure defects are remedied and ensure a follow-up inspection identifies that the remedial work has been successful, and to the satisfaction of the project manager / end user.

10.4.3 Confirm completion of defects by contractor.

1. General

- 1.1 Monitor performance of consultants acting on framework commissions on an annual/end of project basis and report findings to the Client.
- 1.2 The scope of services follows the RIBA Plan of Work 2013. Any item not specifically referenced which is part of an Architects/Lead Consultants normal services is deemed included within the relevant work stage, including all necessary drawings, calculations, dynamic modelling, etc.

2. Services including:

- 2.1 General Architectural Services.
- 2.2 Specialist Architectural Services, including residential.
- 2.3 Interior Design.
- 2.4 Interior Space Planning Specialist Services.
- 2.5 Interior Fit Out.
- 2.6 Landscaping.
- 2.7 Specialist Medical equipment – pre–installation.
- 2.8 Fire Safety Compliance.

3. Stage 0 – Strategic Definition/Outline Business Case

3.1 Inception

- 3.1.1 Receive Client Briefing.

3.2 Define Objectives, Constraints and Criteria for Development

- 3.2.1 Establish the scope of the project in association with the project manager and disseminate to other consultants.
- 3.2.2 Undertake site appraisals.

3.3 Health and Safety File and Health and Safety Plan

- 3.3.1 Contribute to health and safety file and health and safety plan for construction phase.

3.4 Consider and Appraise Options

- 3.4.1 Co-ordinate and prepare in capital and works-related revenue terms feasibility studies to form part of appraisal of options.
- 3.4.2 Evaluate feasibility studies in capital and works-related revenue terms to form part of appraisal options.
- 3.4.3 Co-ordinate/Consult with local authority and other statutory authorities.

3.5 Risk Assessment and Contingency Allowance

- 3.5.1 Input into/Co-ordinate risk assessment and prepare report for project manager on contingency allowance.

3.6 Selection of Preferred Options

- 3.6.1 Re assess studies of preferred option.
- 3.6.2 Input into/Co-ordinate and submit report to project manager recommending preferred option.
- 3.6.3 Input into/Co-ordinate and submit outline business case report.
- 3.6.4 Prepare/Co-ordinate and agree development control plan (DCP) with project manager.

4. Stage 1 – Preparation and Brief

4.1 Receive client briefing.

4.2 Client Brief

- 4.2.1 Prepare and maintain detail programme and agree with project manager and other consultants.
- 4.2.2 Establish project organisation.
- 4.2.3 Develop project objectives, including quality objectives, project outcomes and sustainability objectives including other parameters or constraints.

4.3 Health and Safety File and Health and Safety Plans

- 4.3.1 Contribute to health and safety file and health and safety plan.

4.4 Initial Brief

- 4.4.1 Prepare and maintain detail programme and agree with project manager and other consultants.

4.5 Site Investigation

- 4.5.1 Co-ordinate work of this stage, confirm programme and report to project manager.
- 4.5.2 Determine extent of and contribute to supervision of site investigations. Agree and order site investigation in conjunction with other consultants.

4.6 Outline Design

- 4.6.1 Co-ordinate and prepare report on the recommended site in association with other consultants.
- 4.6.2 Prepare outline plans.
- 4.6.3 Provide services in connection with environmental studies.
- 4.6.4 Contribute to report on recommended site including constraints and opportunities.
- 4.6.5 Prepare zoning and strategic layouts.
- 4.6.6 Generate initial design studies.
- 4.6.7 Advise on energy conservation and assist in the determination of energy targets.
- 4.6.8 Input into/Co-ordinate work on initial design studies and supervise testing against planning control and constraints of cost, structure and services.
- 4.6.9 Co-ordinate and advice on energy conservation and determination of energy targets.

4.7 Planning Permission

- 4.7.1 Input into/Co-ordinate consultations with local authority and other statutory authorities and ensure that applications to obtain planning approval are made.

4.8 Development Control Plan (DCP)

- 4.8.1 Input into/Co-ordinate confirmation of development control plan (DCP) and agree with project manager including preparation of block plan of scheme identifying main departments and showing relationship with any earlier and possible further developments.
- 4.8.2 Co-ordinate preferred design and site development plans.

4.9 Risk Assessment and Contingency Allowance

- 4.9.1 Input into/Co-ordinate update of risk assessment and prepare report for project manager on contingency allowance.

4.10 Budget Costs

- 4.10.1 Input into/Co-ordinate preparation of cost plan.

4.10.2 Input into/coordinate information for budget cost statement and confirm to project manager that proposals can be afforded.

4.11 Post-project evaluation

4.11.1 Co-ordinate preparation of report on criteria for post-project evaluation.

4.12 Contract Strategy

4.12.1 Prepare report for project manager on contract strategy.

4.12.2 Agree schedule of services, design responsibility matrix, information exchanges and project execution plan.

4.13 Scheme Validation

4.13.1 Confirm to project manager that design meets functional content policy requirements.

4.13.2 Input into/Co-ordinate and prepare a report for the project manager to include any specific unresolved problems and to demonstrate that the scheme is cost effective.

4.13.3 Review the programme with the project manager.

5. Stage 2 – Concept Design

5.1 Design

5.1.1 Receive client briefing.

5.2 Full Brief

5.2.1 Update and maintain detail programme for this stage, co-ordinate work of other consultants and report to project manager.

5.2.2 Establish design co-ordination policy and maintain under review.

5.3 Health and Safety Plan and health and safety file

5.3.1 Update contribution to health and safety plan and health and safety file.

5.4 Concept design

5.4.1 Prepare concept design including outline proposals for structural design, building services systems, outline specifications.

- 5.4.2 Co-ordinate the work of other consultants in the development of the design, means of escape, compartments, room layouts and ensure that fire strategy, zoning and energy targets are complied with and that costs accord with the cost plan.
- 5.4.3 Co-ordinate consultations with local authority and other statutory authorities and ensure that applications to obtain final planning approval are made and statutory submissions commenced.
- 5.4.4 Agree material and construction specification.
- 5.4.5 Co-ordinate and verify that statutory submissions are made.

6. Stage 3 Developed design

6.1 Developed Design

- 6.1.1 Prepare/Coordinate developed design including coordinated and updated proposals for structural design, building services systems and outline specifications.
- 6.1.2 Detail co-ordination of construction, structure and services design and room layouts.
- 6.1.3 Input into/Co-ordinate information for checking design against cost plan. Take action on cost checking reports where necessary and agree final room layouts.
- 6.1.4 Monitor and co-ordinate preparation of production information, co-ordinate work of other consultants, maintain programme and agree when the production information is frozen.
- 6.1.5 Review and update sustainability, maintenance and operational and handover strategies and risk assessments.
- 6.1.6 Undertake third party consultations as required and conclude research and developments aspects.
- 6.1.7 Review and update project execution plan, including change control procedures.
- 6.1.8 Review and update health and safety strategy.
- 6.1.9 Review BREEAM compliance and BIM modelling.

6.2 Planning permission

- 6.2.1 Co-ordinate statutory submissions to obtain approvals.

7. Stage 4 – Technical Design and Contract

7.1 Receive client briefing.

7.2 Technical Design

- 7.2.1 Input into/coordinate preparation of technical design in accordance with design responsibility matrix and project strategies to include all architectural, structural and building services information, specialist sub-contractor design and specifications in accordance with design programme.
- 7.2.2 Input into/coordinate review and updating of sustainability, maintenance and operational and handover strategies and risk assessments.
- 7.2.3 Input into/coordinate review and updating project execution plan.
- 7.2.4 Input into/coordinate review and updating health and safety strategy.
- 7.2.5 Review BREEAM compliance and BIM modelling.

7.3 Tender documentation

- 7.3.1 Provide input to and monitor the production of tender documents.
- 7.3.2 Coordinate information for the Pre-tender estimate.
- 7.3.3 Co-ordinate update of risk assessment and re-evaluation of contingency allowance; report to project manager.

7.4 Select tenderers

- 7.4.1 Update and maintain detail programme for this stage, co-ordinate work of other consultants and report to project manager.
- 7.4.2 Receive tender lists from project manager and co-ordinate comments.

7.5 Contract documents

- 7.5.1 Co-ordinate production of contract documents.

7.6 Establish contract programme

- 7.6.1 Establish contract programme.

7.7 Post-tender estimate

- 7.7.1 Co-ordinate update of risk assessment and re-evaluation of contingency allowance; report to project manager.
- 7.7.2 Establish approved sum.

8. Stage 5 - Construction and equipment supply

8.1 Receive client briefing

8.2 Execution and control of works

8.2.1 Co-ordinate work of other consultants in carrying out post-contract and cost management procedures and report to project manager.

8.2.2 Co-ordinate compliance with local authority and other statutory authority procedures.

8.3 Health and safety file and health and safety plan.

8.3.1 Contribute to health and safety file and health and safety plan.

9. Stage 6 – Handover and Close out

9.1 Receive client briefing

9.2 Technical commissioning team

9.2.1 Co-ordinate technical commissioning team.

9.3 Technical commissioning programme

9.3.1 Collaborate in preparation of technical commissioning programme.

9.4 Record drawings and operational/maintenance manuals, health and safety files

9.4.1 Co-ordinate preparation of a set of record drawings and guidelines on the operation and maintenance of the building services for submission to the client together with the health and safety file when the project is completed and ready for handover.

9.5 Statutory certificates (fire etc.)

9.5.1 Co-ordinate the necessary submissions to enable the client to obtain fire and other statutory compliance certificates prior to occupation.

9.6 Certificate of practical completion

9.6.1 Co-ordinate preparation of certificate of practical completion.

9.6.2 Conclude administration of building contract.

10. Stage 7 – In use

10.1 Receive client briefing.

10.2 Final account

10.2.1 Co-ordinate preparation and agreement of final account in conjunction with the QS and QS.

10.3 Post-project evaluation

10.3.1 Co-ordinate and prepare report on post project evaluation.

10.3.2 Arrange post project evaluation meeting 3 months after completion.

10.4 Final Defects Inspection

10.4.1 Input into/coordination of 12 months defects inspection.

10.4.2 Ensure defects are identified and logged with the contractor. Ensure defects are remedied and ensure a follow-up inspection identifies that the remedial work has been successful, and to the satisfaction of the project manager / end user.

10.4.3 Confirm completion of defects by contractor.

1. General

- 1.1 **Monitor performance of consultants acting on framework commissions on an annual/end of project basis and report findings to the Client.**
- 1.2 **The Appointment of Other Consultants generally follows the RIBA Plan of Work 2013.**
- 1.3 **Delete services not required from the scope of services contained within the project appointment.**

2. General Services Applicable to all work stages

- 2.1 Advise the Client on the selection, the terms of appointment and fee structures for the Professional Team. Advise the Client on design services required under the Building Contract.
- 2.2 Attend Client, Design, Project, Site and other meetings.
- 2.3 Issue instructions on behalf of the Client to the Professional Team and Contractor in accordance with the terms of their Appointments/the Building Contract.
- 2.4 Agree Project reporting and recording procedures with the Client, the Professional team and the Contractor. Report to the Client.
- 2.5 Liaise with the Professional Team and prepare regular/monthly quality, cost and programme reports. Advise the Client of any decisions required and obtain authorisation.
- 2.6 Facilitate, set up and manage value engineering exercises.
- 2.7 Facilitate, set up, attend and manage early warning and risk reduction meetings. Advise the Client of any decisions required and obtain authorisation.
- 2.8 Provide specialist procedural advice to comply with Procurement Regulations and/or other legislation.
- 2.9 Prepare documentation and/or provide advice to support adjudication, mediation, litigation or arbitration proceedings. Attend adjudication, mediation, litigation or arbitration proceedings.
- 2.10 Advise on the implications of developing different sites.
- 2.11 Advise on the preparation of development appraisals.
- 2.12 Obtain life cycle cost studies and estimates of annual running costs.

3. Stage 0 Strategic Definition and Stage 1 Preparation and Brief

- 3.1 Liaise with the Client and Professional Team to determine the Client's initial requirements and to develop the Client's brief. Establish, review, approval, variation and reporting procedures. Prepare recommendations for the Client's approval.
- 3.2 Liaise with the Professional Team and advise the Client on structural, building, measured and other surveys and site investigations including conditions reports, soil reports etc.
- 3.3 Advise the Client on demolition, strip out, site investigation and enabling works contracts required before the building contract.
- 3.4 Liaise with the professional Team and procure demolition, strip out, site investigation and enabling works contracts required before the building contract.
- 3.5 Liaise with the Professional team and advise the Client of its obligations under the CDM Regulations.
- 3.6 Comply with the CDM regulations insofar as they relate to this appointment.
- 3.7 Advise the Client on the need for staff resident on site.
- 3.8 Liaise with the Professional Team and advise the Client on Statutory approvals required and fees due in respect of the project. Recommend payments to the Client.
- 3.9 Visit the site and carry out initial inspections. Advise the Client on areas of concern.
- 3.10 Provide broad guidelines on likely cost of meeting objectives.
- 3.11 Perform cost feasibility studies for option appraisal. Collaborate in evaluating options and making recommendations.
- 3.12 Assess on cost options factors from preliminary proposals for several options.
- 3.13 Assist with risk analysis and evaluate financial effects of risks for establishment of contingency allowance.
- 3.14 Assess capital cost of departments including ad hoc departments.
- 3.15 Provide cost advice relating to any necessary consultations with local authority and other statutory authorities including fire authorities.
- 3.16 Complete capital investment manual forms for outline business case submission.

- 3.17 Develop the cost plan in conjunction with other professionals.
- 3.18 Produce cost reports as requested.

4. Stages 2,3 and 4 Concept, Developed and Technical Design

- 4.1 Liaise with the Client and the Professional Team and prepare the Employer's Requirements. Amplify and amend the Employer's Requirements during the design stage.
- 4.2 Establish review, approval variation and reporting procedures. Prepare recommendations for the Client's approval.
- 4.3 Liaise with the professional team and establish structure and procedure for quality management, BREEAM and BIM compliance.
- 4.4 Liaise with the Professional and prepare a full scheme design.
- 4.5 Review scheme design and prepare a report summarising the project design, cost programme and risk register and prepare recommendations for the Client's approval.
- 4.6 Seek Client's approval before proceeding to the next design stage.
- 4.7 Receive stage 1 initial brief including energy policy and expenditure profile, the management control plan, functional content and draft schedule of accommodation.
- 4.8 Prepare and update as necessary report advising on the capital costs of:
 - Additional information arising since outline business case.
 - Alternative operational policies and requirements.
 - Changes in functional content.
 - Alternative designs.
 - Proposed areas of accommodation.
 - The phasing of the contract.
- 4.9 Prepare capital costs of ad hoc designed departments.
- 4.10 Prepare cost models.
- 4.11 Measure and value on cost factors from drawings and from surveys site investigations etc.
- 4.12 Provide cost advice for proposal designs and development plan.
- 4.13 Coordinate and collate equipment costs.

- 4.14 Coordinate and collate capital costs and fee estimates. Capital costs to be constructed on the basis of departmental costs and measured on costs.
- 4.15 Complete capital investment manual forms for outline business case submission.
- 4.16 Evaluate expenditure profile of building and engineering services work.
- 4.17 Prepare a cost plan based on the budget cost.
- 4.18 Provide all necessary supplementary information regarding the budget cost submission.
- 4.19 Confirm the scope of the building contract to the client and advise on additional works required by third parties.
- 4.20 Liaise with the Professional Team and identify any long delivery building components, specialist/proprietary building components and systems and prepare recommendations for the Client's approval.
- 4.21 Prepare and maintain a project execution plan, identify the roles and responsibilities of the Client, the Professional Team, the Contractor and specialist sub-contractors and suppliers.
- 4.22 **Tender documents**
 - 4.22.1 Advise on suitable tenderers for the building contract.
 - 4.22.2 Obtain tender drawings and specifications from the client and professional team.
 - 4.22.3 Liaise with professional Team and provide pre tender estimate.
 - 4.22.4 Liaise with the Client's legal advisors and advise on the use and/or amendment to forms of contract or contribute to the drafting of particular Client requirements.
 - 4.22.5 Distribute tenders and Co-ordinate response to any queries.
 - 4.22.6 Establish and manage pre and post tender interviews.
 - 4.22.7 Liaise with professional team and prepare tender report and recommendations for the Client's approval.
 - 4.22.8 Conduct negotiations with tenderers. Prepare documentation to confirm adjustments to the tender sums, prepare recommendations for the Client's approval.

4.22.9 Liaise with the Client and the Professional team and advise on methods of progressing design and/or construction works prior to execution of the Building Contract.

4.22.10 Obtain Contract drawings and specifications from the Client and the Professional Team. Liaise with the Client's legal advisors, prepare the Contract Documents and deliver to the client and contractor for completion.

5. Stage 5 Construction

5.1 Obtain confirmation that required insurances are in place prior to works commencing on site.

5.2 Agree approvals required from the professional Team under the building Contract.

5.3 Administer the Building Contract.

5.4 Provide specialist advice on the Interpretation of contracts and contractual clauses.

5.5 Prepare interim valuations or review Contractors applications.

5.6 Advise Client on the issue of Payless Notices.

5.7 Establish contract programme and monitor progress against same.

5.8 Advise on the Contractor's entitlement to extensions of time. Analyse and report on the Contractor's applications for extensions of time. Prepare recommendations for the Client's approval.

5.9 Advise on the cost, contractual and programme consequences arising from an acceleration instruction.

5.10 Advise on the Contractor's entitlement to loss and expense. Analyse and report on the Contractor's loss and expense claims. Prepare recommendations for the Client's approval.

5.11 Convene and Chair regular site meetings. Provide minutes to the Client.

5.12 Obtain advice on quality, cost and programme effect of variations prior to the issue of instructions under the Building Contract.

5.13 Obtain authorisation from the Client for additional costs where the Consultants limit of authority is exceeded.

- 5.14** Undertake regular site inspections. Obtain progress and quality reports from site staff representing the Client, Professional Team and the Contractor.

6. Stage 6 Handover and Close Out

- 6.1 Agree all test certificates and statutory and non-statutory approvals required from the Professional Team and the Contractor.
- 6.2 Liaise with the Client, the Professional Team and the Contractor and prepare and maintain a handover plan. Establish, review, approval variation and reporting procedures.
- 6.3 Certify practical completion of the works or parts thereof in accordance with the Building Contract.

7. Stage 7 in Use

- 7.1 Liaise with the Client, the Professional Team and the Contractor and prepare and maintain a defects administration plan. Establish, review, approval variation and reporting procedures.
- 7.2 Facilitate the agreement of the final account from the Parties to the Building Contract, including loss and expense claims.
- 7.3 Advise on the recovery of liquidated and ascertained damages claims.
- 7.4 **Post-project evaluation**
 - 7.4.1 Co-ordinate and prepare report on post project evaluation.
 - 7.4.2 Arrange post project evaluation meeting 3 months after completion.
- 7.5 **Final Defects Inspection**
 - 7.5.1 Input into/coordination of 12 months defects inspection.
 - 7.5.2 Coordinate completion of defects with contractor/end user.
 - 7.5.3 Confirm completion of defects by contractor.

1. General

1.1 **The scope of services follows the RIBA Plan of Work 2013. Any item not specifically referenced which is part of a Building Services Engineers normal services is deemed included within the relevant work stage, including all necessary drawings, calculations, dynamic modelling, etc.**

1.2 The production of Affordable and Sustainable buildings, upgrades and Refurbishment projects.

- Preparation of Schedules.
- General M&E Condition Surveys.
- Structural surveys preparation of specifications and design solutions taking into account Legal and legislative requirements.

- Provide advice on the following services:-
 - Energy Supply – Gas, Electricity and renewable sources.
 - Heating and Ventilating.
 - Water, drainage and plumbing.
 - Day-lighting and artificial lighting.
 - Escalators and lifts.
 - Ventilation and refrigeration.
 - Communications, telephones and IT networks.
 - Security and alarm systems.
 - Fire detection and protection.
 - Air conditioning and refrigeration.
 - Façade engineering.
 - Mechanical Engineering Services.
 - Electrical Engineering Services.
 - Above Ground Drainage Services.
 - Specialist Medical Equipment – Pre installation.
 - BMS Specialist Consultancy Services.

- Medical and Laboratory Gases.

2. Stage 0 – Strategic Definition/Outline Business Case

2.1 Inception

2.1.1 Receive Client Briefing.

2.2 Define Objectives, Constraints and Criteria for Development

2.2.1 Establish the scope of the project in association with the project manager and identify scope of building engineering services.

2.2.2 Undertake site appraisals.

2.3 Health and Safety File and Health and Safety Plan

2.3.1 Contribute to health and safety file and health and safety plan for construction phase.

2.4 Consider and Appraise Options

2.4.1 Prepare strategies and cost implications against options.

2.4.2 Collaborate in evaluation and recommendations of feasibility studies in capital and works-related revenue terms.

2.4.3 Consult with local authority and other statutory authorities.

2.5 Risk Assessment and Contingency Allowance

2.5.1 Input into risk assessment and establishment of contingency allowance.

2.6 Selection of Preferred Options

2.6.1 Prepare strategy for energy and services implications, assessment of site and preferred option.

2.6.2 Input into outline business case report.

3. Stage 1 – Preparation and Brief

3.1 Receive client briefing.

3.2 Client Brief

3.2.1 Collaborate in preparation of detailed programme and agree with project manager and other consultants.

3.3 Health and Safety File and Health and Safety Plans

3.3.1 Contribute to health and safety file and health and safety plan.

3.4 Initial Brief

3.4.1 Collaborate in preparation of detail programme.

3.5 Site Investigation

3.5.1 Determine extent of and contribute to supervision of site investigations and surveys. Agree and order site investigation and surveys in conjunction with other consultants.

3.6 Outline Design

3.6.1 Appraisal of site environmental conditions.

3.6.2 Investigation of main services supplies.

3.6.3 Advise on fuel policy.

3.6.4 Contribute to report on recommended site including constraints and opportunities.

3.6.5 Prepare site strategy for service distribution.

3.6.6 Advise on implications of design studies and check services decisions are valid.

3.6.7 Advise on energy conservation and assist in the determination of energy targets.

3.6.8 Advise on energy conservation and determination of energy targets.

3.7 Planning Permission

3.7.1 Input into consultations with local authority and other statutory authorities and provide input into applications to obtain outline planning approval.

3.8 Development Control Plan (DCP)

3.8.1 Input into preferred design and site development plans for services.

3.8.2 Prepare the engineering DCP drawings.

3.9 Risk Assessment and Contingency Allowance

3.9.1 Input into update of risk assessment and contingency allowance.

3.10 Budget Costs

3.10.1 Assist In preparation of cost plan.

3.10.2 Input into budget cost statement.

3.11 Post-project evaluation

3.11.1 Input into report on criteria for post-project evaluation.

3.12 Contract Strategy

3.12.1 Input into report for project manager on contract strategy.

3.12.2 Agree schedule of services, design responsibility matrix, information exchanges and project execution plan.

3.13 Scheme Validation

3.13.1 Provide building services engineering information for incorporation into the report to include any specific unresolved problems and to demonstrate that the scheme is cost effective.

4. Stage 2 – Concept Design

4.1 Design

4.1.1 Receive client briefing.

4.2 Full Brief

4.2.1 Collaborate in updating detail programme for this stage.

4.2.2 Contribute to design co-ordination policy.

4.3 Health and Safety Plan and health and safety file

4.3.1 Update contribution to health and safety plan and health and safety file.

4.4 Concept design

4.4.1 Develop design in accordance with coordination policy.

- 4.4.2 Prepare concept design including outline proposals for building services design and specifications.
- 4.4.3 Compare area zoning proposals layouts and preliminary sizing.
- 4.4.4 Assist in revision to cost plan.
- 4.4.5 Agree material and construction specification.
- 4.4.6 Co-ordinate and verify that statutory submissions are made.
- 4.4.7 Refine major plant areas and builders work requirements.
- 4.4.8 Consult with local authorities and other statutory authorities and provide input into fire strategy and applications to obtain final planning approval.

5. Stage 3 Developed design

5.1 Developed Design

- 5.1.1 Prepare/Coordinate developed design including coordinated and updated proposals for structural design, building services systems and outline specifications.
- 5.1.2 Detail co-ordination of construction, structure and services design and room layouts.
- 5.1.3 Prepare detailed design and coordinate with building elements.
- 5.1.4 Design to energy targets and report to lead consultant on energy usage.
- 5.1.5 With Architect coordinate plans including user outlets (including luminaires) and all terminals and size of major elements.
- 5.1.6 Room and engineering distribution layouts finalised. Agree ceiling layouts, outlets and grilles and all major builders work.
- 5.1.7 Input into/Co-ordinate information for checking design against cost plan. Take action on cost checking reports where necessary and agree final room layouts.
- 5.1.8 Monitor and co-ordinate preparation of production information, co-ordinate work of other consultants, maintain programme and agree when the production information is frozen.
- 5.1.9 Review and update sustainability, maintenance and operational and handover strategies and risk assessments.
- 5.1.10 Review and update health and safety strategy.

5.1.11 Review Breeam compliance and BIM modelling.

5.2 Planning permission

5.2.1 Complete statutory submissions to obtain approvals.

6. Stage 4 – Technical Design and Contract

6.1 Receive client briefing.

6.2 Technical Design

6.2.1 Input into/coordinate preparation of technical design in accordance with design responsibility matrix and project strategies to include all architectural, structural and building services information, specialist sub-contractor design and specifications in accordance with design programme.

6.2.2 Input into/coordinate review and updating of sustainability, maintenance and operational and handover strategies and risk assessments.

6.2.3 Input into/coordinate review and updating project execution plan.

6.2.4 Input into/coordinate review and updating health and safety strategy.

6.2.5 Review Breeam compliance and BIM modelling.

6.2.6 Prepare detailed design.

6.2.7 Prepare builders work details.

6.2.8 Prepare equipment schedules.

6.3 Tender documentation

6.3.1 Provide input into the production of tender documents.

6.3.2 Provide information for the Pre-tender estimate.

6.3.3 Co-ordinate update of risk assessment and re-evaluation of contingency allowance.

6.4 Select tenderers

6.4.1 Update programme for this stage, co-ordinate with work of other consultants.

6.4.2 Receive tender lists from project manager and provide comments.

6.4.3 Contribute to the invitation of tenders.

6.4.4 Examine tenders received and make recommendations.

6.5 Contract documents

6.5.1 Assist in production of contract documents.

6.6 Establish contract programme

6.6.1 Agree key dates for the contract programme.

6.7 Post-tender estimate

6.7.1 Input into update of risk assessment and re-evaluation of contingency allowance.

6.7.2 Establish approved sum.

7. Stage 5 - Construction and equipment supply

7.1 Receive client briefing

7.2 Execution and control of works

7.2.1 Administer the terms of the contract relating to the execution of the building services works.

7.2.2 Input into carrying out post-contract and cost management procedures.

7.2.3 Carry out local authority and other statutory authority procedures.

7.3 Health and safety file and health and safety plan

7.3.1 Contribute to health and safety file and health and safety plan.

8. Stage 6 – Handover and Close out

8.1 Receive client briefing

8.2 Technical commissioning team

8.2.1 Input into technical commissioning team.

8.3 Technical commissioning programme

8.3.1 Collaborate in preparation of technical commissioning programme.

8.3.2 Input into inspection and testing.

8.4 Record drawings and operational/maintenance manuals, health and safety files

8.4.1 Co-ordinate preparation of a set of record drawings and guidelines on the operation and maintenance of the building structure for submission to the client together with the health and safety file.

8.5 Statutory certificates (fire etc.)

8.5.1 Co-ordinate the necessary submissions to enable the client to obtain fire and other statutory compliance certificates prior to occupation.

8.6 Certificate of practical completion

8.6.1 Assist in the issue of the certificate of practical completion.

8.6.2 Assist in concluding administration of building contract.

9. Stage 7 – In use

9.1 Receive client briefing.

9.2 Final account

9.2.1 Prepare or assist the preparation and agreement of final account for the structural engineering work in conjunction with the QS.

9.3 Post-project evaluation

9.3.1 Assist with evaluation of the project against criteria established in stage 1.

9.4 Final Defects Inspection

9.4.1 Input into 12 months defects inspection.

9.4.2 Coordinate completion of defects with contractor/end user.

9.4.3 Confirm completion of defects by contractor.

1. Building Surveyor Scope of Services

- 1.1 To provide Building Surveyor services in accordance with RICS professional standards and competencies. The client will at mini-competition stage provide specific instructions in respect of the project(s) and services for which offers are sought.**
- 1.2 Undertake general building condition surveys, prepare reports and give advice on the condition of premises.
- 1.3 Undertake building surveys to advise on defects in the walls, Roof, Floors Water and controlled Environment Leak Detection, Drains, Maintenance, Planned and Reactive or other parts of a building which may materially affect its safety life and value.
- 1.4 Undertake structural surveys and prepare specifications.
- 1.5 Provide Whole Life Cost considerations.
- 1.6 Preparation of works packages suitable to tender.
- 1.7 Monitoring of construction works.
- 1.8 Advising on the preservation/conservation of historic buildings.
- 1.9 Provide assistance with planning applications and advising on property legislation and building regulations.
- 1.10 Providing assistance with design and regulations on access to the needs of people with disabilities.
- 1.11 Provide building and measured surveys of land and buildings, take levels and produce survey drawings to include information as agreed.
- 1.12 Provide asset management services.
- 1.13 Provide Insurance services.
- 1.14 Provide feasibility services.
- 1.15 Provide Property Services.
- 1.16 Provide Landlord and Tenant services.
- 1.17 Liaise with the Clients legal advisors and advise the Client on matters concerning ownership of the Site including title matters, boundaries, rights to light, rights of way, restrictive covenants, sale and purchase agreements to lease, funding agreements etc.

Consultants Framework
Appendix C Schedule of Service
Lot 5 Building Surveyor Services

- 1.18** Provide Fire Reinstatement valuations.
- 1.19** Provide advice on Party Wall Matters.
- 1.20** Provide advice in respect of defective works etc.
- 1.21** Make applications for licences or other consents.
- 1.22** Advise on grants and other financial assistance available for the project.
- 1.23** Carry out inspections and surveys, prepare estimates for the replacement and reinstatement of the buildings, and plant. Submit and negotiate claims following damage by fire or other causes.
- 1.24** Carry out the preparation of a programme for the maintenance of a building. Arrange maintenance contracts.
- 1.25** These services to include any other services as undertaken by a consultant within this role.
- 1.26** Monitor performance of consultants acting on framework commissions on an annual/end of project basis and report findings to Trust.
- 1.27** Plan, organise and supervise office / clinic moves as required to agreed timescales set by the Project Manager.

1. General

- 1.1 **The scope of services follows the RIBA Plan of Work 2013. Any item not specifically referenced which is part of a Structural Engineers normal services is deemed included within the relevant work stage, including all necessary drawings, calculations, dynamic modelling, bar schedules, etc.**

2. Stage 0 – Strategic Definition/Outline Business Case

2.1 Inception

- 2.1.1 Receive Client Briefing.

2.2 Define Objectives, Constraints and Criteria for Development

- 2.2.1 Establish the scope of the project in association with the project manager and identify scope of engineering services.
- 2.2.2 Undertake site appraisals.

2.3 Health and Safety File and Health and Safety Plan

- 2.3.1 Contribute to health and safety file and health and safety plan for construction phase.

2.4 Consider and Appraise Options

- 2.4.1 Evaluate structural implications of options and contribute to cost assessment.
- 2.4.2 Collaborate in evaluation and recommendations of feasibility studies in capital and works-related revenue terms.
- 2.4.3 Co-ordinate/Consult with local authority and other statutory authorities.

2.5 Risk Assessment and Contingency Allowance

- 2.5.1 Input into risk assessment and establishment of contingency allowance.

2.6 Selection of Preferred Options

- 2.6.1 Prepare structural assessment of site and preferred option.
- 2.6.2 Input into outline business case report.

3. Stage 1 – Preparation and Brief

3.1 Receive client briefing.

3.2 Client Brief

3.2.1 Collaborate in preparation of detailed programme and agree with project manager and other consultants.

3.3 Health and Safety File and Health and Safety Plans

3.3.1 Contribute to health and safety file and health and safety plan.

3.4 Initial Brief

3.4.1 Collaborate in preparation of detail programme.

3.5 Site Investigation

3.5.1 Determine extent of and contribute to supervision of site investigations. Agree and order site investigation in conjunction with other consultants.

3.6 Outline Design

3.6.1 Advise on site constraints on structure, foundations and site work.

3.6.2 Prepare outline plans

3.6.3 Provide services in connection with environmental studies.

3.6.4 Contribute to report on recommended site including constraints and opportunities

3.6.5 Advise on implications of design studies in terms of structure, foundations and sitework.

3.6.6 Input into initial design studies and supervise testing against planning control and constraints of cost, structure and services.

3.6.7 Advise on energy conservation and determination of energy targets.

3.7 Planning Permission

3.7.1 Input into consultations with local authority and other statutory authorities and provide input into applications to obtain outline planning approval.

3.8 Development Control Plan (DCP)

3.8.1 Input into preferred design and site development plans for structure, roads and sewers.

3.9 Risk Assessment and Contingency Allowance

3.9.1 Input into update of risk assessment and contingency allowance.

3.10 Budget Costs

3.10.1 Assist In preparation of cost plan.

3.10.2 Input into budget cost statement.

3.11 Post-project evaluation

3.11.1 Input into report on criteria for post-project evaluation.

3.12 Contract Strategy

3.12.1 Input into report for project manager on contract strategy.

3.12.2 Agree schedule of services, design responsibility matrix, information exchanges and project execution plan.

3.13 Scheme Validation

3.13.1 Provide structural engineering information for incorporation into the report to include any specific unresolved problems and to demonstrate that the scheme is cost effective.

4. Stage 2 – Concept Design

4.1 Design

4.1.1 Receive client briefing.

4.2 Full Brief

4.2.1 Collaborate in updating detail programme for this stage.

4.2.2 Contribute to design co-ordination policy.

4.3 Health and Safety Plan and health and safety file

4.3.1 Update contribution to health and safety plan and health and safety file

4.4 Concept design

4.4.1 Prepare concept design including outline proposals for structural design and specifications.

- 4.4.2 Define structural layouts
- 4.4.3 Assist in revision to cost plan.
- 4.4.4 Agree material and construction specification.
- 4.4.5 Co-ordinate and verify that statutory submissions are made.
- 4.4.6 Refine structural layout to accommodate compartmentation and services zoning.
- 4.4.7 Consult with local authorities and other statutory authorities and provide input into fire strategy and applications to obtain final planning approval.
- 4.4.8 Prepare detailed design and coordinate with building elements.

5. Stage 3 Developed design

5.1 Developed Design

- 5.1.1 Prepare/Coordinate developed design including coordinated and updated proposals for structural design, building services systems and outline specifications.
- 5.1.2 Detail co-ordination of construction, structure and services design and room layouts.
- 5.1.3 Prepare production drawings
- 5.1.4 Input into/Co-ordinate information for checking design against cost plan. Take action on cost checking reports where necessary and agree final room layouts.
- 5.1.5 Monitor and co-ordinate preparation of production information, co-ordinate work of other consultants, maintain programme and agree when the production information is frozen.
- 5.1.6 Review and update sustainability, maintenance and operational and handover strategies and risk assessments.
- 5.1.7 Review and update health and safety strategy.
- 5.1.8 Review Breeam compliance and BIM modelling.

5.2 Planning permission

- 5.2.1 Complete statutory submissions to obtain approvals.

6. Stage 4 – Technical Design and Contract

6.1 Receive client briefing.

6.2 Technical Design

- 6.2.1 Input into/coordinate preparation of technical design in accordance with design responsibility matrix and project strategies to include all architectural, structural and building services information, specialist sub-contractor design and specifications in accordance with design programme.
- 6.2.2 Input into/coordinate review and updating of sustainability, maintenance and operational and handover strategies and risk assessments.
- 6.2.3 Input into/coordinate review and updating project execution plan
- 6.2.4 Input into/coordinate review and updating health and safety strategy
- 6.2.5 Review Breeam compliance and BIM modelling.

6.3 Tender documentation

- 6.3.1 Provide input into the production of tender documents.
- 6.3.2 Provide information for the Pre-tender estimate
- 6.3.3 Co-ordinate update of risk assessment and re-evaluation of contingency allowance.

6.4 Select tenderers

- 6.4.1 Update and maintain detail programme for this stage, co-ordinate work of other consultants and report to project manager.
- 6.4.2 Receive tender lists from project manager and provide comments.
- 6.4.3 Contribute to the invitation of tenders
- 6.4.4 Examine tenders received and make recommendations

6.5 Contract documents

- 6.5.1 Assist in production of contract documents.

6.6 Establish contract programme

- 6.6.1 Agree key dates for the contract programme.

6.7 Post-tender estimate

- 6.7.1 Input into update of risk assessment and re-evaluation of contingency allowance.
- 6.7.2 Establish approved sum.

7. Stage 5 - Construction and equipment supply

7.1 Receive client briefing

7.2 Execution and control of works

7.2.1 Assist in administration of the terms of the contract relating to the execution of the structural engineering works.

7.2.2 Input into carrying out post-contract and cost management procedures.

7.2.3 Carry out local authority and other statutory authority procedures.

7.3 Health and safety file and health and safety plan

7.3.1 Contribute to health and safety file and health and safety plan.

7.3.2 Ensure as built drawings and specifications are available prior to practical completion of the works.

8. Stage 6 – Handover and Close out

8.1 Receive client briefing

8.2 Technical commissioning team

8.2.1 Input into technical commissioning team

8.3 Technical commissioning programme

8.3.1 Collaborate in preparation of technical commissioning programme.

8.3.2 Input into inspection and testing

8.4 Record drawings and operational/maintenance manuals, health and safety files

8.4.1 Co-ordinate preparation of a set of record drawings and guidelines on the operation and maintenance of the building structure for submission to the client together with the health and safety file.

8.5 Statutory certificates (fire etc.)

8.5.1 Co-ordinate the necessary submissions to enable the client to obtain fire and other statutory compliance certificates prior to occupation.

8.6 Certificate of practical completion

8.6.1 Assist in the issue of the certificate of practical completion.

8.6.2 Assist in concluding administration of building contract.

9. Stage 7 – In use

9.1 Receive client briefing.

9.2 Final account

9.2.1 Prepare or assist the preparation and agreement of final account for the structural engineering work in conjunction with the QS.

9.3 Post-project evaluation

9.3.1 Assist with evaluation of the project against criteria established in stage 1.

9.4 Final Defects Inspection

9.4.1 Input into 12 months defects inspection

9.4.2 Coordinate completion of defects with contractor/end user

9.4.3 Confirm completion of defects by contractor.

1. Generally

1.1 The Services comprise the provision of advice and support to the Employer in respect of the Construction Design and Management Regulations 2015 and fulfilling the role of Principal Designer including but not limited to:

- Advising the Employer on their obligations as Client under the CDM Regulations 2015 and ensuring that all Client functions and duties are complied with.
- Demonstrate capability to act as Principal Designer
- Execute the role of Principal Designer such as to ensure full compliance with Regulation 11.
- Advising on the methods to be adopted to check the competence and adequacy of resources of proposed Designers and the proposed Principal Contractor.
- Reviewing with the Employer and/or their appointed representative, the competence and adequacy of resources of all proposed Designers and the proposed Principal Contractor for the Work Package.
- Advising on the service related information concerning the Site, which the Employer and/or their appointed representative should make available to both the Supplier and to the Design team and the Principal Contractor.
- Liaise with the Client, prepare and submit all notifications and applications required from the Client and Principal Designer required by the regulations.
- Liaise with the Principal Contractor and share with the Principal Contractor the information relevant to the planning, monitoring of the construction phase plan and coordination of Health and safety matters.
- Plan, monitor and coordinate health and safety in the pre-construction phase of a project to ensure the design work contributes to the delivery of a positive health and safety outcome for the project.
- Assist in the identification, elimination or control of foreseeable risks.
- Ensure designers carry out their duties.
- Prepare and provide relevant information to other duty holders.
- Liaising with the all contractors appointed as a Designer to identify health and safety hazards in connection with the Work Packages and ensuring that the contractors comply with their duties under the CDM Regulations.
- Preparing a Pre-Construction Information Pack in the format required by the CDM Regulations 12(5) and where required liaising with the Employer and/or their appointed representative to procure the required information.
- Review and update the pre-construction information pack as and when necessary.

- Ensure that all information provided by designers, specifically hazards is clear and easy to understand for construction workers and is provided before the works commences.
- Ensure that procedures are in place for the immediate reporting of dangerous occurrences.
- Liaising with the Employer and/or their appointed representative with regards to the proposed mobilisation period.
- Liaising with the Principal Contractor, Designers and other contractors appointed by the Employer and/or their appointed representative when the Construction Phase Plan has been suitably developed.
- Liaising with the Principal Contractor, Designer and other Contractors appointed by the Employer to procure the required information to prepare and deliver the Health & Safety file to the Employer in conformity with the requirements of the CDM regulations.
- Ensure that the Principal Contractor complies with the Construction Phase Health and safety plan and facilities required by schedule 2 of the regulations are provided.
- The provision of the forgoing services is provided as required at any work package stage or phase and/ or to support the Employers Capital and Business planning process.
- To provide Health and Safety Consultancy Services to assist NHS customers to manage and comply with UK safety regulations, including support, advice, training and consultancy including Risk Assessments; Accident Investigations; Fire Training; COSH; Health and Safety Plans; Employee Handbooks; Asbestos Awareness; Legal Advice; DBS Clearance: ISA Checks.
- Ensure that the health and Safety file is provided prior to practical completion of the works.

Summary of Services Required

For clarity, the Client is not seeking a buying agency service. The Client requires consultants to manage an agent carrying out the transactions. The role does not cover the services provided by an agent or agency.

The Services may include:

- (a) Property Consultancy
- (b) Property Management Services
- (c) Investment Consulting

1.0 Property Consultancy

- 1.1 Provide the Trust property portfolio advice including, market research, analysis and options appraisals.
- 1.2 Feasibility studies and strategic advice to inform the Trust's Strategy and for optimum market positioning, and design of development options, including financial analysis.
- 1.3 Co-ordination of multi-disciplinary consultancy teams to prepare design briefs relating to development schemes. Review of project designs for marketing and management perspective.
- 1.4 Strategic advice relating to the implementation of development projects (both for Mental, community and other services provided by the Trust) including design, construction delivery options, marketing and management of development schemes.
- 1.5 Response to tender invitations on behalf of developers and advice on terms and conditions associated with joint venture agreements relating to property development.
- 1.6 Carry out soft market testing, maintaining commercial confidence at all times.

2.0 Property Management Advice

2.1 Acquisition of freehold and leasehold property

When instructed, and following agreement on a procurement strategy, project manage a comprehensive search of available property solutions. Responsible for the identification of long lists and costed viable shortlists, surveys, negotiations, the production of a recommendation on the solution which best meets the requirement having taken account of all relevant whole life costs, and any other assistance in satisfactorily concluding the property transaction and acquiring the recommended asset.

2.2 Advice on disposal of freehold and leasehold property including sale, transfer, lease assignment and sub-letting

When instructed and where surplus property has been identified by the Trust, provide an initial report with budget costs, forecast incomes, anticipated outcomes and timings that

take into account market conditions and risks, together with a recommendation to achieve the most favourable outcome for the Trust. Following agreement with the Trust, undertake and project manage the marketing and disposal through to a satisfactory conclusion and provide a comprehensive final report to support a recommendation, including any need for clawback, with advice on amounts and mechanism.

2.3 Rent reviews

Provide an initial report covering all significant facts, setting out actions, negotiating strategies and anticipated outcomes. Manage negotiations (with Agents where appointed) through to a satisfactory conclusion and provide a comprehensive final report to support a recommendation on a figure for settlement. In the event that a satisfactory settlement cannot be reached, advise on appropriate courses of action and represent the Trust in any further proceedings.

2.4 Lease breaks and lease expiries

The provision of comprehensive and timely advice for the Trust, as landlord or tenant, on the most appropriate course of action to be taken at an imminent break or expiry. This can include Lease termination. Advice will take full account of the Trust's best interest, the statutory position, the Trust's estate strategy, business needs, the condition of the building and the state of the market. These services do not constitute instructions to transact the acquisition or disposal of any Trust assets or leases.

2.5 Lease renewals

Provision of an assessment of covering all significant facts, setting out actions, negotiating strategies and anticipated outcomes. Undertake and manage negotiations through to a satisfactory conclusion and provide a comprehensive final report to support a recommendation for agreement. Advice will take full account of the Trust's best interest, the statutory position, the Trust's estate strategy, business needs, the condition of the building and the state of the market.

2.6 Dilapidations

Secure the provision of comprehensive and timely advice for the Trust, as landlord or tenant, on the most appropriate course of action to be taken on a dilapidations liability. Manage negotiations through to a satisfactory conclusion and provide a comprehensive final report to support a recommendation on a settlement.

2.7 Landlord and tenant issues including landlord consents, service charges and claims

Providing advice so that the Trust's position as landlord or tenant is fully informed. This will include reporting on appropriate use of licences, written approvals, consents, insurances etc.

The provision of analysis and recommendations on service charges and other claims received by the Trust including the results of any landlord or tenant negotiations or negotiations with third parties, which prove necessary.

3 Investment Consulting

- 3.1 Supporting the Trust in making recommendations with regard to investment decisions, particularly in relation to options/partnerships (for example JVs, or other special vehicles). Ensuring investment portfolios/opportunities are aligned to the requirements of the Trust and the NHS.
- 3.2 Preparation of investment marketing materials involving research component.
- 3.3 Sophisticated research and analysis to facilitate decisions relating to real estate acquisition and disposition to allow for the Trust to make informed decisions.
- 3.4 Production of Board level options appraisal and presentation to the Boards as needed.
- 3.5 Sectorial and geographical analysis in support of investment strategies and initiatives to align with the Divisional strategies.
- 3.6 Preparation of research documents and independent market reports related to fund raising within the capital markets, demonstrating a pro-active approach top sourcing property options.
- 3.7 Strategic advice in relation to real estate investment. Participation within due diligence exercises relating to real estate assets.
- 3.8 Negotiation with the key stakeholders including planning consultation.

Summary of Services Required

The Services may include:

- (a) NHS Estate Strategic Planning; and/or
- (b) NHS Estate Development and Capability Assessment

1. Developing Estate Strategic Options aligned to the Trust's plans

1.2 These Services involve the development of short and long-term strategic plans for the Trust. Development of these plans includes analysis of the Estate and its associated infrastructure in the context of developing plans to ensure a sustainable disposition and basing structure in support the Trust services.

1.3 The Consultant will be required to use their NHS experience to assist the Trust in the development of its short and long term estate planning through the conduct of specific studies, analysis and modelling of a range of diverse estate issues and proposals.

1.4 The Consultant will be required to address and provide professional advice on the following elements:

- (a) Meeting with key stakeholders to understand the Trust's requirements and develop a Client Brief for approval including analysis, review and confirmation of the scope of works of estate strategic planning related projects. This may require both desk top and/or site visits to confirm particular project priorities and identify all related elements to be included as part of the Project;
- (b) project management of the study, including maintaining and developing project models and various reports. Manage quality assurance, ensuring that all information is aligned and consistent across estate strategic plans;
- (c) financial analysis and modelling of facilities and estate requirements and other operating costs;
- (d) undertake cost benefit studies, user needs analysis, user cost requirements, and input to and validation of other documents;
- (e) engagement and management of specialist sub-consultants (where required), induction briefing on required tasks, and providing / developing instructions aligning roles and responsibilities of sub-consultants involved in the Project;
- (f) stakeholder engagement and support in internal and external stakeholder interactions and presentations;
- (g) provide professional strategic estate advice to the Client Representative on the methodology being used to develop the cost/benefit analysis. This will include advice on the information required to satisfy the requirements of central agencies;
- (h) identify site issues and constraints, such as environmental, heritage, security, indigenous concerns, internal/external zone planning etc.

1.5 The Services to be provided by the Consultant may include:

- (a) scope development & analysis;

- (b) project management;
- (c) financial analysis;
- (d) collection of information and preparation of reports;
- (e) management of sub-consultants;
- (f) internal and external stakeholder engagement including stakeholder presentations to Boards;
- (g) provision of strategic advice, development of options and recommendations;
- (h) identification of risk and key issues;
- (i) identification of site issues;
- (j) the development of an Estates Strategy; and
- (k) healthcare planning to scope and advice on design solutions.

2. Developing sustainable strategy implementation plans

2.1 Projects generally fall into two categories:

- (a) Projects that reinvest in the existing Estate including site redevelopments, consolidations, rationalisations, relocations, and standalone upgrades, adaptive reuse and/or new construction.

2.2 The Consultant will be required to address and provide professional advice relating to the following Estate Development elements:

- (a) in consultation with relevant key stakeholders, analyse, review, confirm or determine the scope of works, to provide a prioritised and costed recommendation that is aligned and consistent with current and future Trust plans. Depending on the specific requirement, this may be limited to a desk top analysis or involve site visits and workshops;
- (b) work with the Trust so that clinical strategies are included in the development of all outcomes
- (c) identification of potential delivery options for the Trust to consider, noting potential budget constraints. The delivery options identified are to be supported by a proposed implementation strategy, to ensure high priorities and risks are appropriately addressed.
- (d) identification of value-add opportunities to realise best value and other efficiency opportunities. This may include, but not be limited to, a cost benefit analysis that considers consolidation, rationalisation, flexibility and efficiency in use including the identification of surplus estate.
- (e) identification of relevant risks, key issues and assumptions in accordance with current regulations and policies coupled with industry best practice and standards. The risk identification is to include any early planning activities to address any high

risks/issues, including consideration of work health and safety matters, relevant to the Estate.

- (f) identification of short and long-term, on and off-site issues This may include analysis and synergies with other significant projects.

1.0 General Services

- 1.1 Provide the Services for all Workplan stages unless instructed otherwise by the Client.
- 1.2 In consultation with the Client, prepare the Schedule of Services for all Project Managers to be appointed by the Client.
- 1.3 Facilitate regular meetings in order to progress Design and Pricing information, consult and liaise with the Lead Designer, Cost Manager and Principal Designer in the preparation of the Project Roles Table, Design Responsibility Matrix, Technology Strategy and Design Programme. Identify activities to be undertaken and responsibility for the activities in accordance with the Project Roles Table, Design Responsibility Matrix, Technology Strategy and Design Programme. Undertake and take responsibility for actions to be undertaken by the Project Lead.
- 1.4 Consult and liaise with other Project Managers on the Project Team to ensure that the Services provided by the Project Manager are fully coordinated with the services provided by those Project Managers and in accordance with the Schedule of Services for each, the Project Roles Table, the Design Responsibility Matrix and the Technology Strategy.
- 1.5 Where there is duplication between the Services provided by the Project Manager and the services of another Project Manager(s), the Project Manager shall resolve the service duplication by agreement with the Project Manager(s) concerned. The Project Manager shall confirm the actions agreed in writing with the Project Manager(s) and copy to the Client.
- 1.6 Manage, co-ordinate and participate in the operation of an Early Warning System.
- 1.7 Where appropriate, organise workshops and exercises and manage contributions of other Project Managers to carry out value engineering, value management, environmental performance improvement initiatives and risk management. Provide recommendations for Contracting Authority approval based on the results of these exercises to deliver the best overall value for money.
- 1.8 Organise meetings with the Client, Project Lead, Lead Designer, other Project Managers and the Contractor as necessary.
- 1.9 In conjunction with the other Project Managers and subject to the specific duties pursuant to each respective Call Off Agreement and/or Building Contract, make all necessary arrangements with planning, local and other statutory bodies to enable the Project to proceed to completion and handover. Arrange for, co-ordinate and pursue all necessary applications required in connection with relevant statutory or regulatory bodies, highway authorities and (if applicable) river and waterway authorities.
- 1.10 Assist with the submission of documentation to landlords and/or funding bodies and/or any third parties who have an interest in the project.
- 1.11 Establish and maintain project management procedures, hierarchy of responsibility, the Communication Strategy and the exchange of information both informally and formally at Information Exchanges.

1.12 Manage the Change Control Procedures and monitor Design and Cost Information development against the Site Information, Project Information, Project Budget, Design Programme, Project Programme and the risk register. Ensure that any difficulties are rectified and the approved Project Budget and Project Programme are not adversely impacted.

1.13 Work closely with the Client, other Project Managers and all stakeholders to foster a partnering culture. The culture will embody the principles of mutual trust and co-operation with an overall aim of delivering a successful project to the Project Brief, Project Budget and the Project Programme.

1.14 Check and authorise applications for payment from the Project Design Team; maintain a fee drawdown register.

2.0 RIBA Stage 0 - Strategic Definition

2.1 Discuss options with the Client for the assembly of the Project Team and assist the Client to assemble and appoint the Project Team.

2.2 Collate comments and facilitate workshops to discuss the Business Case and to develop the Strategic Brief for the Project.

2.3 Review findings from post project evaluations from relevant projects and lead and manage the Sustainability Checkpoint to inform the approach to the Strategic Definition for the Project.

2.4 Establish the Project Brief, the Initial Project Budget and the Project Programme.

2.5 Draft the Project Execution Plan.

3.0 RIBA Stage 1 - Preparation and Brief

3.1 Develop the Initial Project Brief. The Initial Project Brief shall include Project Objectives, Quality Objectives, Project Outcomes, environmental performance/Sustainability Aspirations, Contracting Authority Business Case, Project Budget and Project Programme and all other parameters, risks and/or constraints.

3.2 Review Site Information and Project Information and collate comments from and facilitate workshops to develop the Initial Project Brief.

3.3 In consultation with the Project Team and the Client, agree the procurement route and the standard form of Building Contract.

3.4 Prepare the Project Roles Table and Contractual Tree and continue to assist the Client to assemble and appoint the Project Team.

3.5 Agree with the Lead Designer the Design Responsibility Matrix, Information Exchange and Technology Strategy, all prepared by the Lead Designer.

3.6 Prepare option appraisals that meet the Initial Project Brief. Options produced by the Project Team should collectively address:

- Built Form: including building size, shape, orientation, sub-division, shading, weather and noise protection etc.
- Construction standards: including floor load capacities, column to column spans, insulation, fire protection, glazing ratios, thermal and noise insulation, thermal capacity, natural and artificial illumination, ventilation etc.
- Structural and hard surfacing materials, foundations, temporary structures etc.
- Engineering Services and components: including heating, hot water, cooling, ventilation, lighting, communications, lifting or transportation equipment and public health systems etc.; their operational relationships, methods of control and means of energy supply, distribution and recovery etc.
- Foul and surface water drainage, attenuation and rainwater harvesting.
- External paving and surfacing, roads, car parks and footpaths.

3.7 Prepare the Feasibility Study for the Client preferred option(s).

3.8 Review and update the Project Budget and Project Programme.

3.9 Prepare the Handover Strategy, commence Risk Assessments in preparation for the Concept Design stage, lead and manage the Sustainability Checkpoint, and develop the Project Execution Plan.

3.10 Monitor and review progress and performance of the Project Team.

3.11 Select one or more specialists, where appropriate and legally compliant, to provide input into option appraisals and/or the Feasibility Study in consultation with the Client and the Project Team.

4.0 RIBA Stage 2 - Concept Design

4.1 Monitor preparation and progress of the Concept Design and preliminary Cost Information. Ensure all the foregoing are in accordance with the Initial Project Brief, Design Responsibility Matrix, Information Exchanges and the Design Programme. Prepare Project Strategies.

4.2 Review Site Information, Project Information and collate and agree changes to the Initial Project Brief and prepare and issue the Final Project Brief.

- 4.3 Prepare the Sustainability Strategy and the Maintenance and Operational Strategy and lead and manage the Sustainability Checkpoint.
- 4.4 Review and develop the Handover Strategy and Risk Assessments.
- 4.5 Prepare the initial Construction Strategy and the Health and Safety Strategy.
- 4.6 Review and update the Project Execution Plan.
- 4.7 Review and update the Project Programme and the Project Budget.
- 4.8 Agree with the Lead Designer the Design Responsibility Matrix, Information Exchange and Technology Strategy, all prepared by the Lead Designer. Agree the preliminary Cost Information, prepared by the Cost Manager.
- 4.9 Select and prepare a list of tenderers with the Client.
- 4.10 Collate information from the Project Team and assemble the Employer's Requirements.
- 4.11 Collate and issue the tender documentation.
- 4.12 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 Project Manager shall lead the evaluation and review of the programmes and method statements.
- 4.13 Agree the detailed content and assist with the finalisation of the contract documentation (for pre-construction activities).
- 4.14 Verify that the Contractor has all required insurances, collateral warranties, bonds etc in place.
- 4.15 Monitor and review progress and performance of the Project Team.

5.0 RIBA Stage 3 - Developed Design

- 5.1 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.
- 5.2 Review and update the Sustainability Strategy and the Maintenance and Operational Strategy and lead and manage the Sustainability Checkpoint.
- 5.3 Review and update the Handover Strategy and Risk Assessments.

Consultants Framework
Appendix C Schedule of Service
Lot 11 Project Management Services

- 5.4 Review and update the Construction Strategy and Health and Safety Strategy
- 5.5 Review and update the Project Execution Plan.
- 5.6 Review and update the Project Programme and the Project Budget.
- 5.7 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.
- 5.8 Manage the Change Control Procedures.
- 5.9 Select and prepare a list of tenderers with the Client.
- 5.10 Collate information from the Project Team and assemble the Employer's Requirements.
- 5.11 Not used.
- 5.12 Collate and issue the tender documentation.
- 5.13 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 Project Manager shall lead the evaluation and review of the programmes and method statements.
- 5.14 Agree the detailed content and assist with the finalisation of the contract documentation (for pre-construction activities).
- 5.15 Verify that the Contractor has all required insurances, collateral warranties, bonds etc in place.
- 5.16 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 Project Manager shall lead the evaluation and review of the programmes and method statements.
- 5.17 Monitor and review the performance of the Project Team.

6.0 RIBA Stage 4 - Technical Design

- 6.1 Review and comment on the preparation and progress of the Technical 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.

6.2 Review and update the Sustainability Strategy and the Maintenance and Operational Strategy and lead and manage the Sustainability Checkpoint.

6.3 Review and update the Handover Strategy and Risk Assessments.

6.4 Review and update the Construction Strategy and the Health and Safety Strategy.

6.5 Review and update the Project Execution Plan.

6.6 Review and update the Project Programme and the Project Budget.

6.7 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.

6.8 Manage the Change Control Procedures.

6.9 Select and prepare a list of tenderers with the Client.

6.10 Collate information from the Project Team and assemble the Employer's Requirements.

6.11 Collate and issue the tender documentation.

6.12 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 Project Manager shall lead the evaluation and review of the programmes and method statements.

6.13 Agree the detailed content and assist with the finalisation of the contract documentation.

6.14 Verify that the Contractor has all required insurances, collateral warranties, bonds etc in place.

6.15 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 Project Manager shall lead the evaluation and review of the programmes and method statements.

6.16 Monitor and review the performance of the Project Team.

7.0 RIBA Stage 5 - Construction

7.1 Manage the review of construction standards to verify conformance with the contract documentation, Health and Safety strategies, Design Programme and Construction Programme and that all site queries are resolved in accordance with the foregoing.

7.2 Manage the review of the development of the design to verify conformance with the contract documentation, Health and Safety strategies, Design Programme and Construction Programme and that all Design Queries are resolved in accordance with the foregoing.

7.3 Manage the provision of information to the Contract Administrator to assist administration of the Building Contract.

7.4 Review and update the Sustainability Strategy and lead the Sustainability Checkpoint.

7.5 Manage the implementation of the Handover Strategy

7.6 Review and update the Construction Strategy and the Health and Safety Strategy.

7.7 Review and update the Project Programme and the Project Budget.

7.8 Monitor the compilation of the 'As Constructed' Information is provided in accordance with the Construction Programme.

7.9 Agree with the Lead Designer the Information Exchange, prepared by the Lead Designer.

7.10 Manage the review of proposals for the testing, setting to operation and commissioning and the witnessing of all testing and commissioning and that all testing and commissioning records are present and accurate and reflect the required performance.

7.11 Prepare a planned maintenance programme for the project, post-handover, and provide recommendations for the procurement of the planned maintenance.

7.12 Monitor and review the performance of the Project Team.

8.0 RIBA Stage 6 - Handover & Close-Out

8.1 Manage the handover of the building in accordance with the Handover Strategy and manage and prepare the Sustainability Checkpoint.

8.2 Manage the provision of information to the Contract Administrator to assist administration of the Building Contract.

8.3 Manage the update of the Project Information.

8.4 Manage the update of the As Constructed Information.

9.0 RIBA Stage 7 - In-Use

Consultants Framework
Appendix C Schedule of Service
Lot 11 Project Management Services

- 9.1 Manage the completion of the tasks in the Handover Strategy.
- 9.2 Manage and prepare the Post Occupancy Evaluation.
- 9.3 Manage the update of As Constructed information in accordance with Contracting Authority Feedback.
- 9.4 Manage the update of Project Information in response to ongoing Contracting Authority Feedback.
- 9.5 Manage the post completion defect rectification process in accordance with Client requirements.
- 9.6 Manage the post completion monitoring process in accordance with Client requirements.
- 9.7 Manage and prepare the review of Project Performance, Project Outcomes, the Sustainability Checkpoint and the outcome of any research and development aspects.

SERVICES GENERAL:

1. As per the Project Particulars contained within the Call Off Contract.
2. The Supplier is required by the Client to provide an independent quality control service for the Project.
3. The Supplier shall:
 - a) provide professional advice in regard the project and report as required;
 - b) liaise with members of the Client's professional team including any sub-contractors;
 - c) attend site at regular intervals to provide progress reports and attend meetings;
 - d) carry out a physical inspection of the works;
 - e) re-inspect the works;
 - f) attend all snagging and defects inspections; and
 - g) assist the Client to prepare for procedural compliance and quality audits if necessary.

SERVICES DETAILED:

1. The Supplier will take a pro-active approach to drive and ensure a high quality of construction and finish is achieved at all stages throughout the project ensuring the desired high quality outcomes are achieved by all sub-contractors highlighting any concerns regarding performance at the earliest opportunity.
2. The Supplier will ensure the Contractor achieves the desired level of quality demanded of a high value project as outlined in the Employers requirements.
3. The Supplier will review all construction drawings providing comment with particular comment to value engineering by the contractor, identifying opportunities for cost savings to the Client and recommending improvements both functional and practical.
4. The Supplier will provide a record of completion of each key element of the construction project confirming satisfactory completion and quality achieved.
5. The Supplier will thoroughly review and be fully conversant with the Employers Requirements and produce a schedule of key requirements to use as a reference for checking compliance on site.
6. The Supplier will be fully conversant with the Finishes Schedule and check for compliance on site. The Supplier will review and advise on any alternative contractor's proposals.

7. The Supplier will with the project team review detailed kitchen drawings to maximise design potential and ensure high level of specification in design and co-ordination with M & E layouts are achieved.
8. The Supplier will work with the Project Team in reviewing all M & E proposals and provide comment where improvements to layouts can be achieved. The Supplier will also review products proposed and advise regarding suitability or recommend alternative proposals.
9. The Supplier will where required carry out a pre-decorations snag to all units and record any issues raised on the weekly monitoring schedule .
10. The Supplier will carry out a detailed and thorough snagging and de- snagging service to all areas of the project to ensure the high level specification is achieved and must allow sufficient time within the programme to fully test all elements of the building to achieve zero defects at handover. Clear records showing completion of all snags must be recorded and provided to the client for future monitoring.
13. The Supplier will regularly review the Contractors Quality Audit systems to confirm these are being followed.
14. The Supplier will act as a point of reference for queries post completion in regard to technical aspects of the building in particular in relation to queries from the Clients Defects – Co-coordinator in responding to resident’s enquiries.
15. The Supplier will bring to the attention of the client any failures, shortcomings or deviations with the contractors own quality control regime.
16. The Supplier will allow for appropriate attendance on site in order to check all key aspects of the building at various stages of the construction process. On average a minimum of 14 hours per week should be allowed with decreased attendance at the beginning of the scheme and with increased attendance for snagging as necessary to achieve the desired level of quality inspections outlined above.
17. The Supplier shall undertake a preliminary technical appraisal of the project in line with Reporting Requirements, Para 1.
18. The Supplier shall be to provide the Client with progress and quality inspection reports relevant to such visits.
19. The Supplier shall be required to take all reasonable steps to ensure that the Build Contractor complies with obligations contained within the Construction Contract documents and report any deviations from same to the Client. These should be recorded on the Site inspection report which should be completed following every site inspection.
20. The Supplier shall be required to advise the Client of the Contractor’s progress against the contract programme. The Supplier should advise of any possible future delays that can be identified.

Consultants Framework
Appendix C Schedule of Service
Lot 12 Clerk of Works Services

21. The Supplier shall be required to attend part of each site meeting to discuss quality and to attend other such meetings as may be requested by the Client.

22. The Supplier shall be required on at least one occasion prior to each of the following:

- a. Partial possession
- b. Practical Completion of Section of the Works
- c. Practical Completion of the Whole of the Works

To carry out a physical inspection of the works, then prepare and issue to the Contractor detailed schedules in line with Reporting Requirements, Para 5.

23. The Supplier shall be required to re-inspect the works to ensure items identified in the requirement above have been completed and advise the

24. Client when the works are ready for handover. A minimum of fourteen days notice shall be given to the Client by the Supplier.

25. If instructed the Supplier will witness/inspect all fire stopping/compartimentation and provide a photographic record confirming appropriate fire stopping is in place.

26. The Supplier shall ensure that all plumbing works are adequately tested; the results recorded and shall attend such testing prior to covering up.

27. The Supplier shall attend all snagging and defects inspections and shall ensure that, prior to all snagging inspections:

1. Heating & hot water systems are on and have been run for a minimum of 24 hours
2. The Supplier shall be expected to be fully conversant with the following documents and ensure they hold copies of:
 - a. Employer's Requirements;
 - b. contractor's proposals including drawings;
 - c. contractor's programme; and
 - d. post Contract drawings as and when issued.

3. The Supplier shall not:

- a. incur extra costs;
- b. issue instructions to the Contractor either in writing or verbally;
- c. vary procedures laid down by the Client; or

- d. authorise day works or the like.
 - e. do anything else which does not ordinarily fall to be done by a Building Inspector, unless authorised in writing by the Client or its agent.
4. The Supplier shall assist the Client to prepare for procedural compliance and quality audits if necessary.
 5. The Supplier will attend end of defect inspections with the Client and the Contractor's representative.

REPORTING REQUIREMENTS:

1. The Supplier will provide the Client with progress and quality inspection reports relevant for each site visit.
2. The Supplier will produce preliminary technical appraisal report. The report will include identifying key stages and design details where inspection is critical and produce a bespoke project inspection checklist. The Supplier shall also inform the Client of any specialist items that the Supplier feel would benefit from independent inspection from a third party.
3. The Supplier shall be required to confirm the gross internal floor areas to the Client as measured physically on site and to report any deviation from floor areas confirmed within the Construction Contract documents at the earliest opportunity.
4. The Supplier shall be required to check post contract drawing issues received during the course of the project and advise the Client of any departures from the Construction Contract documents
5. The Supplier shall confirm satisfactory completion of each stage of the works and record these on the progress reports.
6. After carrying out any physical inspection of the works, the Supplier must prepare and issue to the Contractor detailed tracker schedules of all works found to be unfinished and any other defects, shrinkages or other faults in accordance with the terms of the building contract.
7. The Supplier will provide a dated and signed schedule per plot confirming the testing of all appliances, sanitary wear and M & E.
8. The Supplier shall inform the Client of proposed site visits so that they have the opportunity to accompany the Supplier.
9. The Supplier shall be required to obtain from the Contractor certificates of testing as necessary including manufacturer's testing certificates and details and results of all tests and to

Consultants Framework
Appendix C Schedule of Service
Lot 12 Clerk of Works Services

witness all tests (unless expressly exempted by the [Client]) and to instruct the Contractor upon any necessary tests after consultation with the Client and in accordance with the Construction Contract.

10. The Supplier shall be responsible for obtaining in a timely manner at handover the necessary certifications from the Contractor and shall provide these certifications to all necessary parties in a timely manner.

11. The Supplier will check as far as is practical that all elements of construction are in accordance with the relevant regulations, codes of practice, British standards, and the contract documents.