

# TERM SERVICE DELIVERY AGREEMENT (NEC PROFESSIONAL SERVICES CONTRACT)

This is a Service Delivery Agreement as defined in the Framework Agreement made between Scape Procure Limited (1) and Perfect Circle JV Ltd (2) dated 29<sup>th</sup> January 2021 (the 'Agreement'). Except where the context otherwise requires, all terms defined in the Framework Agreement shall have the same meaning in this Service Delivery Agreement.

THIS AGREEMENT is made on 19/10/2021

## BETWEEN

1. the *Client* Defence Infrastructure Organisation

Address for communications  
St Georges House  
Kingston Road  
Sutton Coldfield  
West Midlands B75 7RL

Address for  
Communications  
**REDACTED**@mod.gov.uk  
Telephone  
07970 170883

2. the *Consultant* Perfect Circle JV Ltd

of whose registered office is  
Address for communications

Halford House  
Charles Street  
Leicester  
LE1 1HA

Address for electronic  
communications  
**REDACTED**@aecom.com  
Telephone  
**REDACTED**

FOR THE SERVICES OF Audit of Asset Data across DIO Estate

Commission Name  
DIO Utilisation Study

Commission No.  
3574

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DIO QA:

## Introduction

### NEC3 Professional Services Contract – Option G

This Delivery Agreement incorporates the NEC 3<sup>rd</sup> edition Professional Services Contract April 2013 (the **NEC3 Professional Services Contract**).

Any subsequent amendments to the NEC3 Professional Services Contract shall apply to this Model Delivery Agreement, if agreed in writing by Scape and the Partner, but shall only be incorporated into Delivery Agreements executed after such amendments are published and their inclusion has been agreed accordingly with Scape.

The following rules apply to the incorporation of clauses into a Delivery Agreement:

- a) The contract clauses are varied by the incorporation of option clauses, or a Z clause.
- b) The Client has sole discretion to the choice of Contract Option and Secondary options as noted above
- c) The Client shall act as the *Employer* in this contract
- d) The 'Client Proposed Appointment Charge' from the Framework Commercial Model is shown as the 'Employer Proposed Appointment Charge' in this agreement
- e) The *task schedule* must include the appropriate components of the Framework Commercial Model uplifted in accordance with the Framework Agreement, e.g. using the Uplift Percentage appropriate to the forecast value of the Delivery Agreement
- f) *staff rates* must include the appropriate rates for the Service drawn from the Framework Commercial Model and uplifted in accordance with the Framework Agreement e.g. for regional adjustment factor appropriate to the location of services delivered under the Contract and the Uplift Percentage appropriate to the forecast value of the Delivery Agreement

### Whereas:

This Delivery Agreement is made pursuant to the Framework Agreement dated 29th January 2021 made between Scape Procure Limited and the Perfect Circle JV Ltd (the 'Framework Agreement') and incorporates those provisions of the Model Delivery Agreement set out in the Framework Agreement.

When using this Delivery Agreement, the Partner and Client (as stated in the Framework Agreement) are the parties named as 'Consultant' and 'Employer' respectively.

### IT IS AGREED as follows:

#### 1. The **Consultant's** Obligations

The *Consultant* provides the services and complies with his obligations, acting as the *Consultant* in accordance with the *conditions of contract* set out in the Contract Data herein.

#### 2. The **Employer's** Obligations

The *Employer* pays the amount of money and complies with its obligations in accordance with the conditions.

## Contract Data and Service Information

### Information provided by the Parties

The following details the Contract Data and associated Scope / Service information which is provided by the parties for this Delivery Agreement and Appended for execution.

**The Main Contract Data must be completed in full and uploaded using ONLY the standard template provided by Scape'**

### Main Contract Data:

General Project Information,  
Clauses Applicable to Main Options and Secondary options where applicable,  
Data Pertaining to Optional (X) Clauses,  
Y Clauses and Z Clauses where applicable.  
Contract Data Provided by the Client:  
Contract Data Provided by the Consultant:

### Additional Contract Data provided by the parties.

One or more files may be attached in each section of the table below.  
Please itemise and upload in the order you wish documents to be appended.

### Ref Item Description Attach

#### Continues

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001 Service Request Proposal

## **Contract Data and Service Information**

### **Additional Contract Data provided by the parties.**

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### **Ref Item Description Attach**

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[The execution details for the Client below are an example intended for use with DocuSign and may be amended by the Client to suit their normal practice, if required. If the Client chooses to sign the Agreement on paper, only this page should be returned by upload using the DocuSign Print and Sign function]

Executed as a simple contract (under hand) for and on behalf of  
Defence Infrastructure Organisation  
by

**REDACTED**

.....  
Authorised Signatory

**REDACTED**

.....  
Full name

DIO Comrcl Manger -EnSer8

.....  
Position/title

Executed as a simple contract (under hand) for and on behalf of )  
**Perfect Circle JV Ltd )**  
by )

.....  
OR Authorised Signatory

Executed as a simple contract (under hand) by  
as attorney for .....

**Perfect Circle JV Ltd** Full name  
under a power of attorney  
dated

**REDACTED**

.....  
Authorised Signatory

**REDACTED**

.....  
Full name

Director

.....  
Position/title

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Term Service Delivery Agreement  
(NEC3 Professional Services Contract)

## Main Contract Data

Scape Consultancy Framework - Built Environment – Lot 1 – Non-USVF 1

### Contract Data: Part One – Data provided by the Employer

#### 1. General

The *conditions of contract* are (as each has been amended by Option Z) the core clauses and the clauses for main Option G, dispute resolution Option W2 and secondary Options X1, X2, , X9, , X11, X18, , Y(UK)2, Y(UK)3 of the NEC3 Professional Services Contract April 2013.

- The *Employer* is

Name: **Defence Infrastructure Organisation**

Address: **DIO, Kingston Road, Sutton Coldfield, West Midlands, B75 7RL**

Telephone: 07970 170883

E-mail address: **REDACTED**@mod.gov.uk

- The *Adjudicator* is

Name: **Not named**

Address: **N/A**

Telephone: **N/A**

E-mail address: **N/A**

- The *services* are **Audit of Asset Data across DIO Estate**
- The *Scope* is in **the Service Request Form annexed to this contract**
- The *language* of this contract is **English**
- The *law* of the contract is the law of **England and Wales**
- The *period for reply* is **2 weeks**
- The *period for retention* is **6 years** following Completion or earlier termination
- The *Adjudicator nominating body* is **the Royal Institution of Chartered Surveyors**
- The *tribunal* is **the Courts**
- The following matters will be included in the Risk Register;
  - **To be agreed at Task Order level**

Optional clause 13.9 – electronic communication **does** apply<sup>1</sup>.

<sup>1</sup> See additional conditions of contract below.

Term Service Delivery Agreement  
(NEC3 Professional Services Contract)

**Main Contract Data**

Scape Consultancy Framework - Built Environment – Lot 1 – Non-USVF 2

2. The Parties' main responsibilities

- The *Employer* provides access to the following persons, places and things

access to access date

**Site – As scheduled in the SoR**

**Receipt of Task Order**

**Building – As scheduled in the SoR**

**Receipt of Task Order**

**Site Manager -Various across sites**

**Receipt of Task Order**

**Reports/Records – As issued by Client under SoR scope**

**Receipt of Task Order**

3. Time

- The starting date is **4<sup>th</sup> October 2021**
- The *Consultant* submits revised programmes at intervals no longer *than* **monthly, unless there are no changes to the latest submitted programme.**

4. Quality

- The quality policy statement and quality plan are provided within **2** weeks of the Contract Date.
- The *defects date* is **52** weeks after Completion of the whole of the *services*.

5. Payment

- The *assessment interval* is monthly
- The *currency* of the contract is **the pound sterling**
- The *interest rate* is 3% per annum above the base rate in force from time to time of the Bank of England.

6. Indemnity, insurance and liability

- The amounts of insurance and the periods for which the *Consultant* maintains insurance are

**Event Completion of the whole of the services or earlier termination**

Liability of the *Consultant* for claims made against him arising out of his failure to use skill and care required by this contract.

**cover £5,000,000\*** in respect of each and every claim or series of claims arising out of the same original cause or source (or equivalent), without limit to the number of claims, save that there may be lower and/or annual aggregate limits of cover in respect of pollution and contamination related claims and similar where such limited cover is the norm

**period following**

**6 years**

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Term Service Delivery Agreement  
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**Main Contract Data**

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**event** death or bodily injury to a person  
(not an employee of the  
*Consultant*) or loss of or damage  
to property resulting from an  
action or failure to take action by  
the *Consultant*

**cover** £10,000,000\* in respect of each  
claim, without limit to the number  
of claims

**period following** 6 years

**event** death or bodily injury to  
employees of the *Consultant*  
arising out of and in the course  
of their employment in  
connection with this contract

**cover** The greater of the amount  
required by law and £10,000,000 in respect of each  
claim, without limit to the number  
of claims

**period following** 6 years

\* to be agreed with the *Employer* on a commission specific basis

- The *Employer* provides the following insurances
- Insurance for all existing buildings and property existing within the Site or at the sole discretion of the *Employer* he may elect to 'self-insure' such existing buildings and property and in doing so accepts all of the *Employer's* associated risks arising out of or in relation to such 'self-insurance'. In accordance with an *Employer's* decision to 'self-insure' they do not accept any additional insurance premium/cost from the *Consultant*. The *Consultant* is to assume the *Employer* insures or "self-insures" as set out above and if this is not the case the *Consultant* will have the opportunity to price for providing these insurances.
- The *Consultant's* total liability to the *Employer* for all matters arising under or in connection with this contract, other than the excluded matters is limited to **£5,000,000.00 in the aggregate**.

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**Main Contract Data**

Scape Consultancy Framework - Built Environment – Lot 1 – Non-USVF 4

**Optional statements** (The following optional clauses apply)

**If the *Employer* has decided the *completion date* for the whole of the *services***

- The *completion date* for the whole of the *services* is **31/12/2022**

**If no programme is identified in part two of the Contract Data**

- The *Consultant* is to submit a first programme for acceptance within **4** weeks of the *Contract Date*.

**If the *Employer* has identified work which is to meet a stated *condition* by a *key date***

- The *key dates* and *conditions* to be met are **None**

*condition* to be met

*key date*

- 1.
- 2.
- 3.

**If Y(UK)2 is used and the final date for payment is not 14 days after the date when payment is due**

The period for payment is **14** days i.e.

The total period for payment after receipt of invoice is 21 days<sup>2</sup>

**If the *Employer* states any *expenses***

- The *expenses* stated by the *Employer* are

Item

amount

**None unless stated in individual Task Orders**

**If Option G is used**

- The *Consultant* prepares forecasts of the total Time Charge and *expenses* at intervals no longer than **4** weeks.
- The *exchange rates* are those published in **[to be agreed on a commission specific basis]** on ..... (date)

**If Option X1 is used**

- **The People's Rates will be adjusted in accordance with the indexation provisions of the Framework Agreement**

<sup>1</sup> Perfect Circle are commitment to pay its Supply Chain within 19 days. As a consequence, the *Employer* ought to pay Perfect Circle within the 21 days stated in the Delivery Agreement and not amend the payment terms

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**Main Contract Data**

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**If Option X2**

- The *law of the project* is the law of **England and Wales**

**If Option X8 is used**

- The *collateral warranty agreements* are  
agreement reference third party  
**N/A**

**[The forms of the *collateral warranty agreements* are set out in the Framework Agreement]**

**If Option X18 is used**

- The *Consultant's* liability to the *Employer* for indirect or consequential loss for all matters other than Cladding Claims is limited to

- **£5,000,000\***

The *Consultant's* liability to the *Employer* for indirect or consequential loss or for any cost of decamping and rehousing in respect of Cladding Claim is excluded<sup>3</sup>.

- The *Consultant's* liability to the *Employer* for Defects that are not found until after the *defects date* is
- **£5,000,000\***

- The end of liability date is **6** years after Completion of the whole of the services.

**\* to be agreed with the *Employer* on a commission specific basis<sup>4</sup>**

**If Options Y(UK)3 is used**

- Term person or organisation

**None None**

**Optional clause Z4.0 – Information Modelling does not apply**

<sup>2</sup> The *Consultant* is not liable to the *Employer* for indirect or consequential loss or for any cost of decamping and rehousing in respect of Cladding Claims.

<sup>3</sup> It is essential to ensure that the caps under Option X18 match those provided by the Supply Chain, i.e. if necessary, reduced from £5 million to lower levels offered by Supply Chain. This must be agreed in advance with the *Employer* at Service Request stage.

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### Option Z: ADDITIONAL CONDITIONS OF CONTRACT

The additional *conditions of contract* are identified by the amendments, alterations, additions and deletions as contained herein apply and take priority over the standard form NEC Professional Services Contract Option G.

#### Z1.0 Core Clause amendments

##### 1 General

11.2 (2) Add further bullet point:

- 'provided or procured all Collateral Warranties which the *Consultant* is then obliged under this contract to provide or procure.'

11.2(13) At the end of the sentence add:

'Appropriately spent excludes time;

- spent on activities included within the Commercial Inclusions Tables contained in the Pricing Procedures of the Framework Agreement,

- not justified by the *Consultant's* accounts and records,

- that should not have been paid to a Subconsultant or supplier in accordance with its contract,

- was incurred only because the *Consultant* did not

- follow an acceptance or procurement procedure stated in the Scope,

- give an early warning which the contract required it to give or

- give notification to the *Employer* of the preparation for and conduct of an adjudication or proceedings of a tribunal between the *Consultant* and a Subcontractor or supplier, and the cost of

- activities included under the Employer Proposed Appointment Charge of the Framework Agreement,

- correcting Defects after Completion,

- correcting Defects caused by the *Consultant* not complying with a constraint on how it is to Provide the

Service stated in the Scope,

- for staff not used to Provide the Service (after allowing for reasonable availability and utilisation), and

- preparation for and conduct of an adjudication or proceedings of the *tribunal* between the Parties.'

11.2(20) Delete the second bullet point and replace with:

'the lump sum price in the Task Schedule for each other item. Where marked accordingly, these lump sum prices may be calculated from applying a stated 'Charge' percentage from the Task Schedule to a forecast or estimated construction project value to establish a single or series of lump sum prices.'

11.2(26) Insert a new clause 11.2(6):

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**Main Contract Data**

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'Framework Agreement is the framework agreement between Scape Procure Limited and the *Consultant* dated 29<sup>th</sup> January 2021.'

11.2(27) Insert a new clause 11.2(27):

'Framework Commercial Model as included in the Framework Agreement between Scape Procure Limited and the Consultant dated 29<sup>th</sup> January 2021.'

11.2 (28) Insert a new clause 11.2(28): 'Data Protection Legislation means:

i. the General Data Protection Regulation (Regulation (EU) 2016/679), the Law Enforcement Directive (Directive (EU) 2016/68) and any applicable national implementing laws as amended from time to time;

ii. the Data Protection Act 2018 to the extent that it relates to processing of personal data and privacy; and

iii. all applicable law about the processing of personal data and privacy.'

11.2 (29) Insert a new clause 11.2(29):

'Data Subject has the meaning given to it in the Data Protection Legislation.'

11.2 (30) Insert a new clause 11.2(30):

'Personal Data has the meaning given to it in the Data Protection Legislation.'

11.2 (31) Insert a new clause 11.2(31):

'Cladding Claim shall mean any claim in respect of:

The combustibility of any Aluminium Composite Panels (and associated core/filler and insulation) which failed the BRE testing programme on behalf of The Department for Communities and Local Government in July and August 2017 or fails BS8414 test set out in the current Building Regulations.'

12.4 Insert at the end:

'provided that Clauses 23 (Convictions), 29 (Statutory Requirements), 30 (Competition Law, Corrupt Gifts and Payments), 31 (Modern Slavery), 33 (Confidentiality and Freedom of Information), 35 (Intellectual Property) and 37.11 (Miscellaneous: Whistle Blowing) of the Framework Agreement shall be deemed incorporated into this contract, mutatis mutandis, as if references to 'Scape' were to 'the *Employer* and references to the 'Agreement' were to 'the *contract*.'

12.5 Insert a new clause 12.5:

'A reference to any statute, enactment, order, regulation or other similar instrument shall be construed as a reference to the statute, enactment, order, regulation or instrument as amended by any subsequent statute, enactment, order, regulation or instrument or as contained in any subsequent re-enactment of it.'

13.9 Insert a new clause 13.9:

'The following communications shall be deemed to have no effect if made by electronic mail transmission:

- any notification of a wish to terminate this contract or the employment of the Consultant under it;
- any notification by the Consultant of his intention to suspend performance of his obligations under this contract;
- any invoking by either party of the procedures applicable under this contract to the resolution of disputes or differences; and

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· any agreement between the parties amending the provisions of this contract.'

*(Z clause 13.9 may be deleted at the Employers sole discretion)*

14.1 Add after the final sentence:

'Notwithstanding any other provision of this contract, the terms 'acceptance', 'approval' or similar when used in the context of any acceptance or approval to be given by or on behalf of the *Employer* has the meaning 'acceptance of general principles only' and no such acceptance or approval shall diminish or relieve the *Consultant* from any of the *Consultant's* obligations or liabilities under this contract.'

**19. Insert a new Clause 19:**

### **Data Protection**

'Both Parties will comply with all applicable requirements of the Data Protection Legislation. These clauses are in addition to, and does not relieve, remove or replace, each Party's obligations under the Data Protection Legislation. It is agreed that:

19.1. Without prejudice to the generality of clause 19.1, both Parties will ensure that it has all necessary appropriate consents and notices in place to enable lawful transfer of any Personal Data to each other for the duration and purposes of this agreement.

19.2. Without prejudice to the generality of clause 19.1, the *Consultant* shall, in relation to any Personal Data processed in connection with the performance by the *Consultant* of its obligations under this agreement:

19.2.1. Process that Personal Data only on the written instructions of the *Employer* and only as required for the purpose of the performance of this agreement;

19.2.2. Ensure that it has in place appropriate technical and organisational measures, reviewed and approved by the *Employer*, to protect against unauthorised or unlawful processing of Personal Data and against accidental loss or destruction of, or damage to, Personal Data, appropriate to the harm that might result from the unauthorised or unlawful processing or accidental loss, destruction or damage and the nature of the data to be protected, having regard to the state of technological development and the cost of implementing any measures (those measures may include, where appropriate, pseudonymising and encrypting Personal Data, ensuring confidentiality, integrity, availability and resilience of its systems and services, ensuring that availability of and access to Personal Data can be restored in a timely manner after an incident, and regularly assessing and evaluating the effectiveness of the technical and organisational measures adopted by it);

19.2.3. Ensure that all personnel who have access to and/or process Personal Data are obliged to keep the Personal Data confidential;

19.2.4. Not transfer any Personal Data outside of the European Economic Area;

19.2.5. Assist the *Employer*, at the *Consultant's* cost, in responding to any request from a Data Subject and in ensuring compliance with its obligations under the Data Protection Legislation with respect to security, breach notifications, impact assessments and consultations with supervisory authorities or regulators;

19.2.6. Notify the *Employer* without undue delay on becoming aware of a Personal Data breach;

19.2.7. At the written direction of the *Employer*, delete or return Personal Data and copies thereof to the *Employer* on termination of the agreement; and

19.2.8. Maintain complete and accurate records and information to demonstrate its compliance with this clause and allow for audits by the *Employer* or the *Employer's* designated auditor.

19.3. The *Employer* does not consent to the *Consultant* appointing any third-party processor of Personal Data under this agreement.'

**Main Contract Data**

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**2 The Parties' main responsibilities**

21. Amend as follows:

21.2 Delete and replace with:

'The *Consultant*'s obligation is to use (and warrant that it has used) all the reasonable skill, care and diligence normally used by competent and appropriately qualified professionals experienced in providing services similar to the *service*.'

21.5 Insert a new clause 21.5:

'The *Consultant* checks the Scope provided by the *Employer* and satisfies itself that its own provision of the *service*, including any proposals, designs and Scope or specification documents for a subsequent construction contract meet the *Employer*'s Scope with no discrepancy. Where there is ambiguity, inconsistency or conflict between these documents the *Employer*'s Scope will prevail.'

21.6 Insert a new clause 21.6:

'The *Consultant* performs the Service in accordance with relevant laws and regulations, statutory and other requirements ('Laws') and (to the extent that the *Consultant* can control the same) such that the product of the Service complies with all relevant Laws.'

24.5 Insert a new clause 24.5:

'The *Consultant*, in relation to any subcontracting of any portion of the *service*:

- Procures that the relevant subcontract contains such obligations as necessary to ensure that it is in all respects compatible with the terms of this contract and, without limitation, steps down the obligation to use the degree of skill, care and diligence specified in this contract and that requires collateral warranties in favour of the *Employer* to be provided in the forms specified in the Framework Agreement and with any amendments as permitted by the Framework Agreement;
- Procures that all relevant subcontracts shall be executed and delivered as a deed;
- Warrants each Subcontractor's compliance with this contract's Modern Slavery Act requirements;
- Warrants that all Subcontractors are fully aware of their obligations under the CDM Regulations and are fully competent and are adequately resourced to meet those obligations; and

- Provides to the *Employer* a certified copy of any subcontract (save for particulars of the cost of such subcontract service unless other provisions of this contract or the Framework Agreement oblige the *Consultant* to disclose them).

The *Consultant* does not appoint a subcontractor if there are compulsory grounds for excluding the subcontractor under regulation 57 of the Public Contracts Regulations 2015.'

24.6 Insert a new clause 24.6:

'The *Consultant* includes in any subcontract awarded by him provisions requiring that:

- payment due to the Subcontractor under the subcontract is made no later than 30 days after receipt of a valid and undisputed invoice unless the Framework Agreement required the *Consultant* to make earlier payment to the Subcontractor;
- Invoices for payment submitted by the Subcontractor are considered and verified by the *Consultant* in a timely fashion;

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**Main Contract Data**

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· Undue delay in considering and verifying invoices is not sufficient justification for falling to regard an invoice as valid and undisputed; and

· Any contract awarded by the Subcontractor for work included in this contract includes provisions to the same effect as these provisions.'

26 Insert a new clause 26:

'The *Consultant* shall enter a novation agreement in the form specified in the Framework Agreement with the *Employer's* contractor within 14 days of being asked to do so in writing and shall, within 14 days of being provided with an engrossment, execute and return to the *Employer* the *collateral warranty agreement* in favour of the *Employer*, but with such amendments as the *Consultant*, *Employer* and *Employer's* contractor may agree, such agreement not to be unreasonably withheld or delayed.'

**5 Payment**

50.3 Insert at the end of the second bullet point:

'less expenses included in the Commercial Inclusions Tables from the Framework Agreement's Pricing Procedures,'

51.6 Insert a new clause 51.6:

'In addition to any other legal rights and remedies of the *Employer*, with the exception of when the *Consultant*

is novated to a contractor under the *conditions of contract*, whenever any sum of money is recoverable from

or payable by the *Consultant* under this contract that sum may be deducted from any sum then due, or which at any time thereafter becomes due to the *Consultant* under this contract provided that the *Employer* notifies the *Consultant* in writing not later than three days before the final date for payment of the amount to be paid and the basis on which it is calculated.'

**6 Compensation events**

63.10 At the end of the sentence add:

'Rates for subconsultant staff are calculated by applying the *Uplift Percentage* to the subconsultant's proposed rate. Unless the *Employer* otherwise agrees, proposed rates must not exceed the relevant regionally adjusted People Rates for the applicable role and seniority stated in the relevant table of the Framework Commercial Model. If the *Employer* and *Consultant* do not agree on the rate to be used, the *Employer* assesses the rate based on the *staff rates*. The agreed or assessed rate becomes the *staff rate* for that designation of person.'

63.19 Insert a new clause 63.19:

'The *Employer* and *Consultant* may agree rates or lump sums to assess the change to Prices or Prices for

new items in the Task price list. If the *Employer* and *Consultant* do not agree on the rate or lump sum to be used, the *Employer* assesses the rate or lump sum based on the *staff rates*.'

**8 Indemnity insurance and liability**

81.1 Amend the insurance table:

delete the words 'and care normally used by professionals' in the first insurance of the Insurance Table and replace with:

'care and diligence normally used by competent and appropriately qualified professionals experienced in'

83 Insert a new clause 83: **Insurance policies**

### **Main Contract Data**

Scape Consultancy Framework - Built Environment – Lot 1 – Non-USVF 11

83.1 'Before the *starting date* and on each renewal of the insurance policy until the *defects date*, the *Consultant* submits to the *Employer* for acceptance certificates which state that the insurance required by the contract is in force. After the *defects date* and on each renewal of the insurance policy until the end of the periods stated in the Contract Data for which insurance is to be maintained, the *Consultant* submits to the *Employer* for acceptance certificates which state that insurance required by this contract is in force. The certificates are signed by the *Consultant's* insurer or insurance broker. The *Employer* accepts the policies and certificates if the insurance complies with the contract and if the insurer's commercial position is strong enough to carry the insured liabilities. The *Employer's* acceptance of an insurance certificate provided by the *Consultant* does not change the responsibility of *Consultant* to provide the insurances stated in the Contract Data.

83.2 The Parties comply with the terms and conditions of the insurance policies which they are a Party.'

84 Insert a new clause 84:

#### **If the Consultant does not insure**

84.1 'The *Employer* may insure an event or liability which the contract requires the *Consultant* to insure if the *Consultant* does not submit a required certificate. The cost of this insurance to the *Employer* is paid by the *Consultant*.'

85 Insert a new Clause 85:

#### **Insurance by the Employer**

85.1 'The *Employer* submits certificates for insurance provided by the *Employer* to the *Consultant* for acceptance before the *starting date* and afterwards as the *Consultant* instructs. The *Consultant* accepts the certificates if the insurance complies with the contract and if the insurer's commercial position is strong enough to carry the insured liabilities.

85.2 The *Consultant's* acceptance of an insurance certificate provided by the *Employer* does not change the responsibility of *Employer* to provide the insurances stated in the Contract Data.

85.3 The *Consultant* may insure an event or liability which the contract requires the *Employer* to insure if the *Employer* does not submit a required certificate. The cost of this insurance to the *Consultant* is paid by the *Employer*.'

90.5 Insert a new clause 90.5:

#### **The Public Contracts Regulations 2015**

90.5 'The *Employer* may terminate the *Consultant's* obligation to Provide the Service if any of the provisions of regulation 73(1) of The Public Contracts Regulations 2015 apply.

The *Employer* may terminate the *Consultant's* obligation to Provide the Services if any of the provisions of paragraph 73(1) of The Public Contracts Regulations 2015 apply.

If the *Employer* terminates under the provisions of paragraph 73(1)(b) of the Public Contracts Regulations 2015 as a result of information not disclosed by the *Consultant* at the Contract Date, the procedures and amounts due on termination are the same as if the *Consultant* has substantially failed to comply with his obligations.

If the *Employer* otherwise terminates under the provisions of paragraph 73(1) of the Public Contracts Regulations 2015, the procedures and amounts due on termination are the same as if the *Employer* no longer requires the services.

90.6 The *Consultant* does not appoint a Subconsultant or supplier if there are compulsory grounds for excluding the Subconsultant or supplier under regulation 57 of the Public Contracts Regulations 2015.

90.7 The *Consultant* includes in any subcontract awarded by him provisions requiring that:

Term Service Delivery Agreement  
(NEC3 Professional Services Contract)

### **Main Contract Data**

Scape Consultancy Framework - Built Environment – Lot 1 – Non-USVF 12

- payment due to the Subconsultant or supplier under the subcontract is made no later than 30 days after receipt of a valid and undisputed invoice, unless this contract requires the *Consultant* to make earlier payment to the Subconsultant or supplier;
- invoices for payment submitted by the Subconsultant or supplier are considered and verified by the *Consultant* in a timely fashion, undue delay in considering and verifying invoices is not sufficient justification for failing to regard an invoice as valid and undisputed; and
- any contract awarded by the Subconsultant or supplier for work included in this contract includes provisions to the same effect as these provisions.'

### **Z2.0 Secondary Option Clause amendments**

None

### **Z3.0 Statutory Clause amendments**

#### **OPTION Y(UK)2: Housing Grants, Construction and Regeneration Act, 1996**

Y2.2 delete clause and replace with the following:

The date on which a payment becomes due is the later of;

- the date of receipt by the Party making payment of an invoice, issued in accordance with these conditions of contract, and
- fourteen days after the assessment date.

The date on which the final payment becomes due is the later of;

- the date of receipt by the Party making payment of an invoice, issued in accordance with these conditions of contract, and
    - if the *Employer* makes an assessment after the defects date or the date the last Defect is corrected, six weeks after the defects date or the date the last Defect is corrected, whichever is the later,
    - if the *Employer* does not make an assessment after the defects date or the date the last Defect is corrected, two weeks after the Consultant issues its assessment, or
    - if the *Employer* has issued a termination certificate, fifteen weeks after the issue of the certificate.
- The final date for payment is seven days after the date on which payment becomes due, or a different period for payment if stated in the Contract Data.
- The *Employer's* certificate is the notice of payment specifying the amount due at the payment due date (the notified sum, which may be zero) and stating the basis on which the amount was calculated. If the *Employer* does not make an assessment after the defects date or the date the last Defect is corrected, the *Consultant's* assessment is the notice of payment.

### **Z5.0 DEFCON Conditions**

Appendix 1 which includes DEFCON conditions shall be incorporated into this Delivery Agreement. To the extent the contents (including, but limited to the clauses, terms and conditions, obligations and liabilities) of Appendix 1 contradict any similar contents of this Delivery Agreement, then Appendix 1 shall prevail. Please note, in Appendix 1, the "Authority" shall mean the "*Client*" and the "Contractor" shall mean the "*Consultant*" in accordance with the SCAPE Consultancy Framework terminology.

Term Service Delivery Agreement  
(NEC3 Professional Services Contract)

### Main Contract Data

Scape Consultancy Framework - Built Environment – Lot 1 – Non-USVF 13

### Contract Data: Part Two – Data provided by the *Consultant* Statements given in all contracts:

· The *Consultant* is

Name: **Perfect Circle JV Ltd**

Address: **Halford House, Charles Street, Leicester, LE1 1HA**

Telephone: **0345 045 0050**

Mobile: **REDACTED**

E-mail address: **REDACTED @aecom.com**

· The *key people* are

Name **REDACTED**

Job **Director, Client Account Manager**

Responsibilities **Client Care and overall responsibility for service delivery**

Qualifications **ARB: RIBA: IWFM**

Experience

**20+ years**

Name

Job

Responsibilities

Qualifications

Experience

The Lead Partner is **AECOM**

· The *staff rates* are

**category of person:**

**Project Management & Quantity Surveying      Hourly Rate\*\* (£)**

Technical Director	<b>REDACTED</b>
Associates/Principal Consultant	<b>REDACTED</b>
Senior Consultant	<b>REDACTED</b>
Consultant	<b>REDACTED</b>
Senior Technician	<b>REDACTED</b>
Technician/Graduate	<b>REDACTED</b>

**Commercial Surveying**

Technical Director	<b>REDACTED</b>
Associate/Principal Consultant	<b>REDACTED</b>
Senior Consultant	<b>REDACTED</b>
Consultant	<b>REDACTED</b>
Senior Technician	<b>REDACTED</b>
Technician/Graduate	<b>REDACTED</b>

Term Service Delivery Agreement  
(NEC3 Professional Services Contract)

**Main Contract Data**

Scape Consultancy Framework - Built Environment – Lot 1 – Non-USVF 14

**Architectural Design, Mechanical Engineer,  
Electrical Engineer, Structural Engineer &  
Building Surveying**

Technical Director **REDACTED**  
Associate/Principal Consultant **REDACTED**  
Senior Consultant **REDACTED**  
Consultant **REDACTED**  
Senior Technician **REDACTED**  
Technician/Graduate **REDACTED**

**\*\* Unless the Employer agrees otherwise, the staff hourly rates must not exceed the equivalent, annually adjusted 'People Rate with expenses' stated in the Framework Commercial Model.**

**Optional Statements**

**If the *Consultant* states any expenses**

The *expenses* stated by the *Consultant* are (Only include expenses and disbursements not listed in the Commercial Inclusions Table of the Framework Agreements Pricing Procedures)

Item <sup>***</sup>	amount
None	

**\*\*\* No expenses are to be included for Prime Core or Core Services covered as defined in the Framework Agreement and included in the Charges and Uplift Percentages stated in the Framework Commercial Model.**

**If Option G is used**

**The *task schedule* is in the Service Request Form annexed to this contract**

· The *Employer Proposed Appointment Charge*  
to be used in the *task schedule* is £ [0.00 \*\*\*\*]

· The *Uplift Percentage* is 5.6\*\*\*\* %

**\*\*\*\* Must not exceed the rates stated in the Framework Commercial Model.**

Term Service Delivery Agreement  
(NEC3 Professional Services Contract)

**Main Contract Data**

Scape Consultancy Framework - Built Environment – Lot 1 – Non-USVF 15

**Annex 1 – Service Request Form**

Term Service Delivery Agreement  
(NEC3 Professional Services Contract)

**Main Contract Data**

Scape Consultancy Framework - Built Environment – Lot 1 – Non-USVF 16

**Appendix 1 – DEFCONS**

The following DEFCONS are additional conditions of contract and take precedence over any other amendments to the conditions of contract. DEFCONS not listed below shall not be considered additional contract conditions by reference in the listed DEFCONS.

**DEFCONS**

**DEFCON 76 (Edn 12/06) - Contractor's Personnel at Government Establishments (7 pages)**

**DEFCON 82 (Edn 11/16) - Special Procedures for Initial Spares (8 pages)**

**DEFCON 129J (Edn 11/16) - The Use of the Electronic Business Delivery Form (2 pages)**

**DEFCON 501 (Edn 11/17) - Definitions and Interpretations (3 pages)**

**DEFCON 513 (Edn 11/16) - Value Added Tax (2 pages)**

**DEFCON 514 (Edn 08/15) - Material Breach (1 page)**

**DEFCON 516 (Edn 04/12) - Equality (1 page)**

**DEFCON 518 (Edn 02/17) - Transfer (1 page)**

**DEFCON 522 (Edn 11/17) - Payment and Recovery of Sums Due (1 page)**

**DEFCON 526 (Edn 08/02) - Notices (2 pages)**

**DEFCON 527 (Edn 09/97) - Waiver (1 page)**

**DEFCON 528 (Edn 07/17) - Import and Export Licenses (5 pages)**

**DEFCON 529 (Edn 09/97) - Law (English) (1 page)**

**DEFCON 531 (Edn 11/14) - Disclosure of Information (3 pages)**

**DEFCON 532B (Edn 04/20) - Protection of Personal Data (1 page)**

**DEFCON 537 (Edn 06/02) - Rights of Third Parties (1 page)**

**DEFCON 538 (Edn 06/02) - Severability (1 page)**

**DEFCON 539 (Edn 08/13) - Transparency (1 page)**

**DEFCON 550 (Edn 02/14) - Child Labour and Employment Law (1 page)**

**DEFCON 602A (Edn 12/17) - Quality Assurance (With Quality Plan) (1 page)**

**DEFCON 604 (Edn 06/14) - Progress Reports (1 page)**

**DEFCON 608 (Edn 10/14) - Access and Facilities to Be Provided by the Contractor (1 page)**

**DEFCON 621B (Edn 10/04) - Transport (If Contractor Is Responsible for Transport) (1 page)**

**DEFCON 624 (Edn 11/13) - Use of Asbestos (2 pages)**

**DEFCON 642 (Edn 06/14) - Progress Meetings (1 page)**

**DEFCON 649 (Edn 12/16) - Vesting (2 pages)**

**DEFCON 658 (Edn 10/17) - Cyber (8 pages)**

**DEFCON 660 (Edn 12/15) - Official-Sensitive Security Requirements (1 page)**

**DEFCON 691 (Edn 03/15) - Timber and Wood-Derived Products (3 pages)**

# SERVICE REQUEST FORM

This is a Service Request as defined in the Framework Agreement made between Scape Procure Limited (1) and the Perfect Circle JV Ltd (2) dated 29<sup>th</sup> January 2021 (the 'Agreement'). Except where the context otherwise requires, all terms defined in the Agreement shall have the same meaning in this Service Request.

## GUIDANCE

The Service Request is used to identify the service(s) the Client requires. This form is only contractually binding once the Delivery Agreement has been executed and therefore does not require a signature but acknowledgment only at this stage.

The Service Request should be completed **at the earliest opportunity during pre-engagement activity**, and through one or more discussions between the Client and the Partner **together**.

At the end of pre-engagement activities, the Partner is required to issue a proposal to the Client setting out how they intend to deliver the service required. This will form the basis of the Delivery Agreement (call off contract).

Scape supports digitisation and lean working practices. As such Scape welcomes the use of Partner's systems to produce the attached Service Request Proposal.

The Service Request Proposal includes the following:

- The service needed by the Client and their desired approach to delivery;
- Any further pre-engagement activity required to be undertaken (by each party) to enable the Partner to put forward their proposal and price (Tendered Total);
- Identifies the Client's key value drivers, (including social value and value for money priorities) combined with a comprehensive delivery proposal;
- Sets out the outputs that should have been achieved by the conclusion of the pre-engagement stage.

# SERVICE REQUEST FORM

This Service Request was Acknowledged on::

## THE PARTIES

The Client

Defence Infrastructure Organisation

Address

DIO HQ

St Georges House

Kingston Road

Sutton Coldfield

West Midlands B75 7RL

The Partner

Perfect Circle JV Limited

Address

Halford House

Charles Street

Leicester

LE1 1HA

Client contact name

REDACTED

Address for electronic communications

REDACTED@mod.gov.uk

Telephone

REDACTED

## COMMISSION SUMMARY

Commission Number/Reference 3574

Commission Name

DIO Utilisation Study

Client estimated budget for Commission

£420,000

Client anticipated start for Commission 04/10/2021

Client anticipated end for Commission 31/12/2022

DocuSign Envelope ID: 2D164DDA-199D-4869-B066-5B3B2B17B2D6

## COMMISSION DETAILS

*Supplied using the Partner's information systems*

**Attach**

The Service Request is attached here.

## SUPPORTING INFORMATION

Please upload and append any additional supporting information about the commission here.

### Ref Item Description

**Attach**

01	20210826_Utilisation_SOR_Technical_Services_v3.pdf
02	Scope of Services Lot 1.pdf

Please select the Approve button below to acknowledge that this Service Request represents an accurate record of pre-engagement discussions, and that you would like the Consultant to proceed with producing a Delivery Agreement based on the proposals contain herein.

Approved by

Client contact name

**REDACTED**

Address for electronic communications

**REDACTED**@mod.gov.uk

Telephone

**REDACTED**

The Approve button is a DocuSign field that won't show on the completed form however the date field on the first page will show the date the form was acknowledged once the approve button has been selected. You can view the full audit history in the summary sheet within DocuSign.

Further to recent discussions, please find below a Service Request as defined in the Framework Agreement made between Scape Procure Limited and Perfect Circle JV Ltd dated 29th January 2021.

**This Service Request Proposal** is formed of 4 parts:

**Part A: Outline Service Requirements**, which captures your service needs and desired approach,

**Part B: Pre-Engagement Activity Checklist**, identifying any activities required to enable our proposal and price to be presented,

**Part C: Detailed Service Requirements**, identifying your key value drivers, inc. Social Value and measures of VmM captured within our comprehensive service delivery proposal,

**Part D: Statement of Key Outputs**, setting out the deliverables from the pre-engagement stage.

**If you are satisfied that this Service Request represents an accurate record of our pre-engagement discussions, and you would like Perfect Circle to proceed with producing a Delivery Agreement based on this proposal, we should be grateful if you would provide your confirmation.**

Perfect Circle is a company jointly owned by Pick Everard, Gleeds and AECOM. Our offer is unique in framework experience, with an unrivalled record of teams providing excellence through collaboration. We deliver with an extensive national supply chain formed of SMEs, micro businesses and larger consultancies, ensuring we provide performance managed services through local businesses. Forming an integrated team across Perfect Circle and our approved suppliers allows the broadest project scope to be offered with value for money through one simple and effective contract, providing maximum efficiencies and contributions to economic, environmental and social benefits to achieve the greatest levels of social value.

## Service Request Proposal

### Part A - Outline Service Requirements

Defence Infrastructure Client Name Organisation

Commission Description Audit of Asset Data across DIO Estate. Commission Name (Title) DIO Utilisation Study

Commission No. 3574 Commission Postcode SP11 8HJ

Client Contact Name **REDACTED**

Client Contact Email **REDACTED**@mod.gov.uk

Client Contact Position Assistant Head Infrastructure Optimisation Client Contact

**REDACTED**

Telephone Number

Lead Partner - Company Name AECOM Commission Lead Contact **REDACTED**  
Name

Commission Lead Contact **REDACTED**@AECOM.COM

Email

Commission Lead Contact Mobile **REDACTED**

Option G NEC3 Professional Service Contract  
(Term Service DA)

Main Contract Type Region West Midlands

Client estimated budget for 420,000.00

Commission £

Client anticipated start date 04 Oct 2021 Client anticipated end date 31 Dec 2022

Has a Client's draft/outline No  
programme been appended?

Other Document Upload 1

Other Document Upload 2

Other Document Upload 3

Has a Client's Project Brief Yes  
been appended?

20210826\_Utilisation\_SOR\_Technical\_Services\_v3.pdf (977 KB)

If yes, upload document

If yes, please provide  
commentary

Has a Scheme Layout been No  
appended?

Are there Client Proposed  
Organisations?

DocuSign Envelope ID: 2FDC1D694FD8D06A--21C9F9D7--44A8A694--B8C06C63--51B43EB429B71074B4623DF6

## Part B - Pre-Engagement Activity Checklist

Are Pre-Engagement Matters required? No

## Part C - Detailed Service Requirements

### 1.1 Project

#### Overview/Background

The project is to facilitate a consolidated understanding of portfolio asset data across Army, RAF and Navy sites as scheduled by the DIO in the SoR. Initially to review held asset data via virtual review with the sites, followed by onsite additional data collection and review as directed over the course of the programme.

Initial Task order to undertake virtual review of Army operational sites and to be followed by a series of Task orders for identified site types and designation.

#### 1.2 Objectives/Outcomes

To build on the collated asset data held within the DIO and to increase the accuracy of DIO operational planning by provision of updated and verified audit.

#### 2.0 Health, Welfare, Safety, Environment and Sustainability Considerations

Initially as the exercise is virtual, there are no specific issues to raise. All resource will be adequately cleared for the role and the use of virtual survey will improve the ultimate sustainability of the project over its duration.

#### 3.0 Value for Money Statement

Moving the original audit to a virtual platform, underpinned by focused site attendance has offered improvement in VfM over the originally scoped delivery method. It provides for improved Cost / Efficiency and Effectiveness as project controls are centrally logged and monitored over the duration.

The client has selected the following Value Drivers that best match its organisation's key objectives for the successful delivery of the commission. These should be referenced by the Client during any subsequent feedback to gauge whether Value for Money has been achieved.

Value for Money Driver (1) 1) Speed of appointment and delivery

Value for Money Driver (2) 4) Working with stakeholders

Value for Money Driver (3) 8) Collaborative working

#### 4.0 Project Success Criteria

In addition to the Value Drivers identified in section 3.0 above, we also monitor the following Performance Indicators as standard for each commission:

- Time Predictability
- Cost Predictability
- Local Spend – Percentage of total spend within 20 miles of Client office/site
- SME Engagement - Percentage of appointments with SME's compared with total number of Supply Chain appointments
- SME Spend - Percentage spend with SME's compared with total spend with Supply Chain
- Fair Payment - Payment of Supply Chain within Government Fair Payment guidelines
- Client Satisfaction
- Supply Chain Satisfaction
- Achievement of Client Social Value Targets – as agreed in section 5.0 below

To augment the above, the client has requested that we include these additional success factors:

- No specific additional measures stated

#### 4.0 Project Success Criteria

#### 5.0 Social Value No specific additional measures stated

The Public Services (Social Value) Act 2012 for England and Wales requires all public bodies to consider how the services they commission and procure might

improve the economic, social and environmental wellbeing of the area for which they are responsible.

We recognise that we have a responsibility to the environment, the communities within which we work, our own people, our supply chain and society. Perfect

Circle's business management systems are fully compliant with the Public Sector (Social Value) Act 2012 and social value is an integral part of Perfect Circle's

approach and operations. Perfect Circle collect data in the following areas as part of our business-as-usual activities:

- Employment including apprenticeships.
- Skills development including activities relating to education and professional bodies.
- Volunteering and charitable activities, including donations in kind through pro-bono work.
- Performance indicators namely local spend, fair payment, SME engagement and spend.

Is the Client interested in setting TOMS targets? No

TOMS Outcome No

Having discussed with the client whether they wish us to augment our Social Value offering by setting up to 5 targets against the National Data Set of TOMs (Themes, Opportunities, Measures), we confirm that these additional measures are not required on this commission.

The services and suppliers proposed for this project are summarised below. In addition, we have indicated the procurement route that is intended to be adopted for each service.

### TOMS Measures

NT Ref (1) Comments (1) Target (1)

NT Ref (2) Comments (2) Target (2)

NT Ref (3) Comments (3) Target (3)

NT Ref (4) Comments (4) Target (4)

NT Ref (5) Comments (5) Target (5)

### TOMS Measures

#### 6.0 Detailed Scope of Services

##### 6.1 Description of the Services to be Provided

Management and undertaking of of asset data audit as per issued SoR across identified sites. Undertaken as a series of Task Orders:

##### 6.2 Service / Price Exclusions

This is to be detailed in each task order as generated.

##### 6.3 Key Stakeholders, Consultations and Interdependencies

Staged interview with heads of establishment at each of the identified sites.

As set out in the Client issued SoR document attached to this build up.

##### 6.4 Summary of Services at Each Project Stage

**Prime Core - RIBA Stages (✓) 0-1\* on time charge 2 on % charge 3 on % charge 4 on % charge 5 on % charge 6 on % charge 7 on % charge Procurement Route**

Project AECOM Management

Yes No No No No No No SFR

Quantity Surveying

No No No No No No No

**Core - RIBA Stages (✓) 0-1\* on time charge 2 on % charge 3 on % charge 4 on % charge 5 on % charge 6 on % charge 7 on % charge Procurement Route**

Building AECOM Surveying

Yes No No No No No No SFR

Architectural Design

No No No No No No No

Mechanical Engineering

No No No No No No No

Electrical Engineering

No No No No No No No

Structural Engineering

No No No No No No No

Commercial Surveying

No No No No No No No

Service Supplier 0-1\* on time charge      2 3 4 5 6 7 Procurement Route

Audit management and delivery  
Gleeds Cost Management  
Yes No No No No No SFR

*\* use RIBA stages 0-1 for non-construction projects*

**Supply Chain Procurement routes available through the framework:**

**SFR** Scape Framework Rates

**AFR** Alternative Framework Rates

**CPO** Client Proposed Organisation at Premium Rates

**CT** Competitive tender with 3 or more suppliers

**BM** Negotiation with a single provider, using an alternative benchmark mechanism

**OB** Adopting an Open book arrangement with a single provider

**CPS** Client determines that a Preferred Supplier's fee offers value for money

Clients should be aware that in order for Perfect Circle to engage Client Proposed Organisations you are acknowledging in approving this Service Request that;

You requested that Perfect Circle appoint the proposed organisation(s).

You are aware that the fees of the proposed organisation(s) are not in line with the Framework Agreement but nonetheless you are content that these offer value for money.

You have undertaken your own technical, commercial, and legal due diligence for the appointment of the proposed organisation(s).

The appointment of a Client Proposed Organisation(s) shall only be permitted when other Services are procured through the Partner and/or its Preferred

Partner(s). Sole appointment of a Client Proposed Organisation shall not be permitted unless otherwise agreed by Scape.

Perfect Circle's appointment of a Client Proposed Organisation(s) will be conditional on the supplier:

Meeting our approval criteria (insurances/ISOs/H&S etc).

Agreeing to the terms of the SCAPE Consultancy Framework Agreement in all other respects by way of a Consultancy Agreement with Perfect Circle that is back-to-back with the main contract with you.

Providing a Collateral Warranty to you.

If the risks associated with the appointment of any such organisation(s) are considered unacceptable then Perfect Circle may refuse to appoint that organisation.

**Non Core Services**

6.5 Supplier Selection and Not Applicable

Competitive Tender Award

Criteria

6.6 Appointment of Principal Not Applicable

Designer

7.0 Delivery Team Not required at present, but can be provided as requested for specific specialist tasks.

Delivery Team - document

upload

Our proposed delivery programme is as follows:

*There are no records to display.*

## 8.0 Delivery Programme

Would you like to upload your No  
own Project Programme

### **Delivery Programme**

#### 9.0 Schedule of Deliverables

Overarching deliverable is to:

Arrange site review.

Undertake facilitated Audit.

Validate data from audit.

Deliver completed data template to DIO for processing.

On request attend site and make additional enquiries on a call off site by site basis.

Any amends to the scope to be agreed on each task order as developed.

#### 10.0 Design Specifications and No applicable

#### 11.0 BIM Requirements and Non applicable

Technical/Quality/Regulatory

Standards

Document Control

12.0 Client Acceptance Criteria Verified and validated data set submitted in Client provided template.

Largest risks are:

ensuring site representation reviews data prior to audit and has sufficient knowledge to answer the audit questions access to the site representatives at the agreed interview time and date and subsequent availability of the site access to undertake follow up.

Mitigated by early delivery of data for review, Client liaison with the sites pre and post audit appointment and close ongoing project board reporting on progress throughout the commission.

#### 13.0 Risks and Opportunities

14.0 Prerequisites, None above those stated in client SoR.  
assumptions and constraints

#### 15.0 Requirements for Surveys, Investigations and Third-Party Historic Data

To be scoped in liaison with the DIO as the need becomes apparent from initial interview process.

## 16.1 Overview Fee

### **Our total fee is summarised as follows**

A - Charges for Prime Core Services RIBA

Workstages 2-7 £

B - Charges for Core Services RIBA

Workstages 2-7 £

C - Time Charges £

D - Sub Total: Charges for Prime Core, Core

Services and Time Charges £

E - External Consultancy Commissions £

Total of Charges £

F - PSC / PSSC Fee £

Total Commission Value £

G - Disbursements £

Overall Commission Value £

This comprises of:

A. Where the commission relates to a Construction Project; Percentage charges for Prime Core services based on the estimated construction value.

B. Where the commission relates to a Construction Project; Percentage charges for Core services based on the estimated construction value.

C. Time charge fees covering Prime Core, Core and Non-core services. These are detailed in section 16.2 below.

D. Sub-total (A plus B plus C)

E. Prices secured from suppliers procured using 'external' non-framework rates. These are detailed in section 16.3 below.

Total of Charges (D plus E)

F. PSC / PSSC Fee

Total Commission Value (D plus E plus F)

G. Disbursements & Expenses

Overall Commission Value (D plus E plus F plus G)

These figures are exclusive of VAT

In preparing our fee we have followed the prescribed rules and tendered rates as defined in the Framework Agreement made between Scape Procure Limited and

Perfect Circle JV Ltd dated 29th January 2021 (the 'Agreement') and updated by all Deed of Variations.

Our Services are broken down across the RIBA Stages as follows:

2

3

4

5

6

7

**Sub Total**

**Service % Charges**

**Project Manager   Quantity Surveyor   Architect Building Surveyor   Electrical Engineer**

**Mechanical Engineer   Structural Engineer   Total Fee**

0

1

2

3

4

5

6

7

**Sub**

**Total**

### Time Charges

Project Manager	Quantity Surveyor	Architect	Building Surveyor	Electrical Engineer	Mechanical Engineer	Structural Engineer	Commercial Surveyor	Non Core	Total Fee
-----------------	-------------------	-----------	-------------------	---------------------	---------------------	---------------------	---------------------	----------	-----------

0

1

2

3

4

5

6

7

Sub total

### Total Charges

Project Manager	Quantity Surveyor	Architect	Building Surveyor	Electrical Engineer	Mechanical Engineer	Structural Engineer	Commercial Surveyor	Non Core	Total Fee
-----------------	-------------------	-----------	-------------------	---------------------	---------------------	---------------------	---------------------	----------	-----------

0

1

2

3

4

5

6

7

Sub total

### Escalators

Project Manager	Quantity Surveyor	Architect	Building Surveyor	Electrical Engineer	Mechanical Engineer	Structural Engineer	Commercial Surveyor	Non Core	Total Fee
-----------------	-------------------	-----------	-------------------	---------------------	---------------------	---------------------	---------------------	----------	-----------

Contract Lead

Supervisor

### Disbursements

## 16.2 Time Charge Schedule

The calculation of time charge fees is based on an hourly rate by grade and the number of hours allocated. As may be appropriate, in the description for each line we have provided a description as to how these two variables have been used.

### Time Charges

*There are no records to display.*

Where non-core services are provided by our Perfect Circle JV and Preferred Partners, they have been priced using the hourly rates from the Scape framework 'Agreement'. Value for money is achieved as these rates have been the subject of a significant competitive tender process. Use of teams from our JV and Preferred Partners, in favour of external suppliers, brings added value to projects in terms of a more efficient team engagement and briefing process, since the teams sit within the same organisations and they have experience of working together.

## 16.3 External Consultancy Costs

The below table provides a summary of those Suppliers who have been selected to undertake services that have been procured using 'external' nonframework rates, as referenced in section 6.4 above

*There are no records to display.*

### External Consultancy

*There are no records to display.*

## 17 Delivery Agreement Professional Services Contract Model

Delivery Agreement Professional Service Contract Model. Option G NEC3 Professional Service Contract  
A description of the contracting options available to you can be found in Appendix B. We are proposing that this appointment is placed using the following:  
17.0 (Term Service DA)

### Appendix A

Scope of Services Lot 1 Scope of Services Lot 1.docx (191 KB)

### Appendix B

## NEC Professional Services Contract Options Introduction

Services provided by Perfect Circle JV Limited (the Consultant) to Clients using the Consultancy Framework shall (unless otherwise directed by Scape) be based on the terms of one of four Model Delivery agreements. Perfect Circle JV Ltd will in turn enter into an agreement with each Supplier providing the services, under which the delivery Agreement obligations are "stepped down".

### The four Model Delivery Agreements available are:

- 1: NEC4 Professional Services Short Contract (PSSC)- Short Service Delivery Agreement
- 2: NEC4 Professional Services Contract (PSC) Option A - Priced Contract with Activity Schedule
- 3: NEC4 Professional Services Contract (PSC) Option C - Target Contract

#### 4: NEC3 Professional Service Contract Option G -Term Service Delivery Agreement

A commission that does not have an engrossed Delivery Agreement between Perfect Circle JV Ltd and the Client is non-compliant.

### 1: NEC4 Professional Services Short Contract (PSSC)

The PSSC is simplified version of the Professional Services Contract which is suitable for less complex appointments.

The PSSC is for use on commissions that impose only low risks on both the client and the Consultant.

### 2: NEC4 Professional Services Contract (PSC) - Option A

#### Priced Contract with Activity Schedule

A lump sum priced contract, in which the risks of being able to provide the service at the agreed prices in the Activity Schedule are largely borne by the Consultant.

The Client carries some risk through the compensation event procedures.

This contract is only used when the scope of work at tender stage is fully known and capable of being priced and programmed.

This option should also be used where the prices are based on the cost of construction (percentage fee).

Please note the consultant fees vary in accordance with the construction cost.

### 3: NEC4 Professional Services Contract (PSC) - Option C

#### Target Contract

A target fee contract in which the financial risks (savings or over-spend) are shared by the Client and the Consultant.

The Consultant's share percentages and the share ranges are:

#### Share range Consultant's Share Percentage

Less than 95% 10%

From 95% to 100% 40%

From 100% to 102.5% 40%

Greater than 102.5% 100%

This contract can only be used when good estimates of scope and price can be made at tender stage or where the cost of construction (percentage fee) is used to set the target.

Also used when the scope of work is finalised after some initial work is undertaken under through a PSSC time charge arrangement, or similar. The target is adjusted for compensation events other than changes in Scope approved by the Client which are proposed by the Consultant which reduce the total

Time Charge. This provides an incentive to Consultants to propose changes to reduce costs.

### 4: NEC3 Professional Service Contract Option G

#### Term Contract

Provides the ability to agree a long-term call-off arrangement using Task Orders.

Option G contains options for time charge and lump sum fee arrangements. The tasks must be defined in the Task Schedule and Delivery Agreement.

This type of contract lends itself to a programme of works where the same contract terms apply for all orders. The Task Schedule should define the projects, the anticipated services required and an outline budget and programme

#### Summary

For each of the above model contracts, Scape has prescribed through the Framework Agreement several Optional clauses, the inclusion or otherwise is

at the discretion of Clients. Other than the above, no other variation to the terms of the Model Delivery Agreements shall be made without the agreement of Scape.

In accordance with the Access Agreement, Client's are entitled to obtain and review a copy of the Framework Agreement to assist them in understanding a Delivery Agreement. The Client should advise the Consultant of the Options that are at the Client's discretion prior to preparation of the Delivery Agreement.

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## Appendix C - Task Schedule

This Task Schedule provides the flexibility to call off professional services on a defined programme of works (as individual projects or activities) as well as calling off professional services on a defined projection a progressive phase-by-phase basis.

### Background / Project Information

Perfect Circle has been appointed to undertake a facilitated audit of DIO data in prescribed sites across the portfolio. To report on this data and to support DIO in validation of the collected asset data

This will include the Services described in Schedule 1 of the Framework Agreement. The Authority may instruct the Consultant, by way of a purchase order, to carry out the following Tasks:

The fees for the Task Schedule listed below are only indicative fee estimates. Unless agreed otherwise, indicative fee estimates shall not be regarded as fixed quotes for each task. There is no obligation for the Client to call off any or all of these tasks, and no obligation for the Consultant to provide the services until a Task Order is executed for each of the required task.

Task No	Task Description	Location	Services	Estimated Start	Date Estimated End Date	Indicative Fee Value £
001	Undertake facilitated audit as DIO SoR to: (Milestones 3,4,5 in the DIO SoR) Army Operational Sites (Excl Training sites) and Mobilisation / induction 60 Sites	National	Project Manager	04 Oct 2021	31 Jan 2022	REDAC TED
002	Undertake facilitated audit as DIO SoR to: (Milestones 6 in the DIO SoR) Army Operational Barracks 34 Sites	National	Project Manager	03 Jan 2022	31 Mar 2022	REDAC TED
003	Undertake facilitated audit as DIO SoR to: (Milestones 7 in the DIO SoR) Navy Operational Sites 14 Sites and Training / Induction	National	Project Manager	03 Jan 2022	31 Mar 2022	REDAC TED
004	Undertake facilitated audit as DIO SoR to: (Milestones 8 in the DIO SoR) RAF Operational Sites 16 Sites Indicative costing at this stage	National	Project Manager	03 Jan 2022	31 Mar 2022	REDAC TED
005	Undertake facilitated audit as DIO SoR to: (Milestones 9 in the DIO SoR) Stratcom Operational Sites 3 Sites	National	Project Manager	03 Jan 2022	31 Mar 2022	REDAC TED
006	Undertake facilitated audit as DIO SoR to: (Milestones 10 in the DIO SoR) All Training Sites 30 Sites	National	Project Manager	03 Jan 2022	31 Mar 2022	REDAC TED
007	Post audit site based review in greater level of detail. Scope and format to be agreed on completion of the audit process.	National	Architect, Building Surveyor, Commercial Surveyor, Electrical Engineer, Mechanical Engineer, Project Manager, Quantity Surveyor, Structural Engineer	03 Jan 2022	31 Dec 2022	REDAC TED

## Appendix C - Task Schedule

Perfect Circle has been appointed to undertake a facilitated audit of DIO data in prescribed sites across the portfolio. To report on this data and to support DIO in validation of the collected asset data.

### Background / Project Information

#### Task Schedule

### Appendix D - CVs for Key Staff

- CV Document Upload (1)
- CV Document Upload (2)
- CV Document Upload (3)
- CV Document Upload (4)
- CV Document Upload (5)

## Part D - Statement of Key Outputs

### **The Client and Perfect Circle have used all reasonable endeavours to capture the following requirements in Part C of the document:**

A summary of the Commission including the extent of the Commission with, a statement of values, performance measures/targets and, as appropriate a sketch layout(s), outline budget(s) and programme for the Commission and any subsequent project(s) which includes estimate for the works or services etc.

Where the execution of an element of the Commission is not a settled matter, the strategy for taking the matter forward, including details of client approval processes.

The Partner's resourcing proposals and supply-chain Procurement Schedule for provision of most economically advantageous service.

On approval of this Service Request, Perfect Circle will draft a Delivery Agreement ready for execution which includes the following where appropriate to the commission:

- The agreed Scope which shall detail the requirements for the carrying out of the Service including agreed outcomes/deliverables, resources, Quality Policy Statement and Quality Plan requirements including roles and responsibilities for the whole team and covering the whole service.
- A programme for the Delivery Agreement.
- An activity schedule, Price List or task schedule, as appropriate to the proposed form of contract and the pricing processes of the Agreement.
- A fully completed Tendered Total Model as required by the Framework Agreement including justification and details of any derogations from the Framework Commercial Model.
- The initial NEC3 PSC Risk Register or NEC4 PSC Early Warning Register.
- Any other documents required by the Delivery Agreement, Collateral Warranties etc
- A completed and agreed Value for Money Statement (must be offered on projects > £20k, but mandatory over £500k)

## Project Management

The Consultant will be given authority as Lead Adviser to run a project(s) on a day-to-day basis on behalf of the client within constraints set by the client or the Project Board. The Consultant's prime responsibility will be to use reasonable endeavours to ensure that projects are delivered to the required quality and specification within the specified constraints of time and cost. As part of this role we would expect the Consultant to deliver the following minimum Project Management outcomes/actions.

### Generally D&B

1

#### D&B

2

#### Trad

**Leadership:** Acting as client's **Lead Adviser**, co-ordinating and integrating the work of a client's advisers, design team members and other parties, however employed. It must have and maintain communication and management review procedures to satisfy itself that all stages of the design team, Contractor and any 3<sup>rd</sup> parties' work can be achieved within the programmed period.

+++

**Representation:** Provide and maintain effective representation of the wider client's design team in all formal communications with the client. Communication protocols and procedures must therefore reflect a 360° collaborative strategy and capability.

+

**Representation:** Provide and maintain effective representation of the client's advisers/design team in all formal communications with the client until the Contractor and its design team are appointed. Once appointed ensure the client's requirements are reflected in the Contractor's proposals. Communication protocols and procedures must therefore reflect a 360° collaborative strategy and capability.

++

**Strategy Planning/Monitoring:** Working with client and stakeholders to establish appropriate Strategies and oversee their fulfilment of the course of the Project. For example, agreement of RIBA Plan of Work Strategies for Sustainability, Soft Landing/Plan for Use etc, benchmarking progress with RIBA's Building in Quality or similar management tools.

+++

**Collaborative working:** support effective collaboration between parties at each stage focusing on discharging appropriate RIBA Plan of Work Strategies, where applicable, to deliver project success through combined skills of project stakeholders including design team, contractor(s), specialists, supply-chain etc.

+++

**Project Management:** Effective management project e.g. programme and commercial control and procurement - monitoring payments to design team members, and preparing and maintaining the programmes of stakeholder engagement activities, design, Digital Execution/BIM etc, and timely procuring of each client adviser, design team member, contractor, specialist etc.

+++

**Contract Management:** fulfil contract management (**Contract Lead**) duties, as appropriate to the main form of contract with the

contractor e.g. NEC ECC Project Manager, NEC PSC Service Manager, JCT Contract Administrator etc. Includes coordinating with those providing other contract roles such as NEC Supervisor, Clerk of Works etc

**+++**

**Attendance/engagement:** activities should include convening/arranging and attending/chairing meetings as necessary to effectively deliver the client's requirements, for example: client/stakeholder engagement, Soft Landing/Plan for Use, Design, Digital Execution/BIM, Project, Site Logistics/constraints, and others. Associated activities include taking/issuing comprehensive notes of each meeting and maintaining meetings are well facilitated and productive.

**+++**

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Lot 1: Scope of Services

Scape Consultancy Framework – Built Environment 3

**BIM/Digital Execution:** Support the effective delivery of BIM Services on every Commission, and BIM Level 2 where requested. **+++**

**Compliance:** Ensure compliance with the statutory requirements, e.g. advising the client of its CDM obligations. **+++**

**Communication:** Maintaining effective communication between all project stakeholders throughout the life of the project. E.g.

Issuing instructions on behalf of the client to other project stakeholders including end-users and the design team

**+++**

**Reporting:** Monitoring/providing reports on actual progress against planned and regularly reporting to the client **+++**

**Plan of work:** Discharge appropriate Core Tasks and Core Statutory Processes from the RIBA 2020 Plan of Work to achieve appropriate Stage Outcomes in a timely and efficient manner.

**+++**

**Supervision:** Where requested fulfil the NEC Supervisor or Clerk of Works duties, otherwise supporting their fulfilment of by others.

**+++**

**Providing client/stakeholders with technical advice/reports:** Providing technical advice and expertise at each stage of a project advising the client, stakeholders and design team on market intelligence, historic reference projects/benchmarks, forecast trends and suitability of design proposals, budgets etc. May need to work alongside Lead Designer and some and/or all of the other design team members including contributors for contractor design portions/ECI. Will also brief/support client staff, examine reports/studies etc, monitor implementation and supervise progress to next stage.

**+**

**Providing client/stakeholders with technical advice/reports:** Providing technical advice and expertise at each stage of a project advising the client, stakeholders and design team on market intelligence, historic reference projects/benchmarks, forecast trends and suitability of design proposals, budgets etc. May need to work alongside Lead Designer and some and/or all of the other client advisers and design disciplines provided by the Contractor. Will also brief/support client staff, examine reports/studies etc, monitor implementation and supervise progress to next stage.

**++**

**Common data environment:** Supporting the procurement and implementation of a common data environment platform. **+++**

**Conduct initiation workshops:** Workshops to be carried out to include Value for Money, Social Value, Sustainability, Collaboration and Best Practice.

+ + +

**Responsible Project Management:** Responsible Project Management concepts will be adopted on all projects. + + +

**Strategic Definition & Preparation and Brief (stages 0 & 1) D&B**

1

**D&B**

2

**Trad**

**Effective means to develop appreciation of client and its project:** e.g. Discuss/map client's Requirements/Business Case, Strategic Brief and other core project requirements, including reporting cycles/client organisation structure/roles, timescale and any financial limits, whole-life targets; assess these and give general advice on how to proceed; establish stakeholders and lines of communication.

+ + +

**Early Contractor Involvement:** engagement of shortlisted/potential direct award contractor(s) where required by client + + +

**Due diligence:** Carry out site/project appraisal and obtain/investigate any reasonably accessible data and information relating to the project and relevant to the works.

+ + +

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Lot 1: Scope of Services

Scape Consultancy Framework – Built Environment 4

**Establishing clear responsibilities of each party:** Establishing project roles, responsibilities, communication methodology, common standards, Digital Execution/Building Information Modelling (BIM) and technology standards and strategy, schedules of services and initial project brief; agreeing project and quality objectives and success criteria (e.g. sustainability outcomes, programme, whole-life cost and quality).

+ + +

**Collaborative review:** Undertake, with other client advisers and design team members where appointed, technical appraisals as may be necessary to determine the feasibility of the client's design solution requirements, programmes, budgets etc

+

**Collaborative review:** Undertake, with other client advisers and (contractor/contractor's team where appointed) technical appraisals as may be necessary to determine the feasibility of the client's design solution requirements, programmes, budgets etc

+ +

**Commercial input:** Work with client advisers/design team members & contributors/contractor/specialists to provide an approximation of cost based on similar available statistics

+ + +

**Executing strategies / adding value:** strategy/project execution plan for the project's execution and use in accordance with the client's brief and stakeholder's objectives; identify the various actions at each stage including proposals for additional research, surveys, investigations and Risk and Value Management Modelling etc

+ + +

**Communication:** confirm communication channels including reporting and authorisation procedures to operate with the client, maintaining effective communication between parties.

**+ + +**

**Providing client/stakeholders with technical advice/reports** e.g. brief/support client staff, examine reports/studies etc, procure and onboard any client advisers, design team and any other consultants/specialists, monitor implementation and supervise progress to next stage.

**+**

**Providing client/stakeholders with technical advice/reports** e.g. brief/support client staff, examine reports/studies etc, procure and onboard design any client advisers and the contractor and any other consultants/specialists (where appointed), monitoring implementation and supervising progress to next stage.

**+ +**

**ISO44001 Collaboration Workshop:** In addition to the collaboration review we will conduct an ISO44001 collaboration workshop to ensure the project adheres to accredited standards and status.

**+ + +**

**Develop Government Soft Landings Strategy:** Early engagement and planning for the project's Government Soft Landings Strategy to prepare for successful handover and operation.

**+ + +**

**Social Value Workshop and Report:** Conduct a Social Value workshop and produce a report to capture social value features most relevant to the client and project.

**+ + +**

**Value for Money Workshop and Report:** Conduct a Value for Money workshop and produce a report to capture areas where VfM can be achieved at an early stage.

**+ + +**

**Best Practice Workshop:** Conduct a best practice workshop to identify innovations and best practice solutions to be adopted into project delivery.

**+ + +**

**Sustainability and Carbon Reduction Plan:** Review sustainability and carbon plan for the project to ensure sustainability, environmental enhancement and carbon reduction are embedded into the scheme.

**+ + +**

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Lot 1: Scope of Services

Scape Consultancy Framework – Built Environment 5

**Manage lessons learnt and client satisfaction process:** Identify lessons learnt and client satisfaction scores from previous projects at an early stage.

**+ + +**

**Concept Design, Spatial Coordination and Technical Design (stages 2, 3 & 4) D&B**

**1**

**D&B**

**2**

**Trad**

**Establishing the team/Procurement:** Leading procurement of client advisers including design team, technical specialists, and contractor(s) where applicable, including tender (MEAT) or direct award assessments including reports and recommendations.

+

**Establishing the team/Procurement:** Leading procurement of client advisers including concept designers, technical specialists, and contractor(s), including tender (MEAT) or direct award assessments, reports and recommendations. Overseeing or undertaking any novations and/or Contractor's procurement of design contributors

+ +

**Teambuilding:** Onboard all new project team members including Contractor, confirming roles, responsibilities, reporting/communication channels between parties and ensuring cultural alignment

+

**Teambuilding:** Whenever Contractor appointed, work with Contractor, supporting onboarding of all new project and/or design team members, ensuring all roles, responsibilities, reporting/communication channels between parties appropriately allocated and cultural alignment

+ +

**Clarify brief:** Agree the scope of the specifications/Scope/Works Information and co-ordination of drawings with particular reference any specialist works/services, working with Client and stakeholders including end-users, client advisers/design team and contractor, as appropriate to procurement route.

+ + +

**Communication & collaboration:** Monitor and maintain effective communication/information exchange/collaboration between parties such as design data

+

**Communication & collaboration:** Support effective communication/information exchange/collaboration between parties such as overseeing transfer of design data, intellectual property, documents and records to Contractor.

+ +

**Commercial leadership:** Oversee preparation/monitor/updates to cost plan/budget breakdown/whole-life forecasts/contingency planning/programme for client approval. Maintain Risk and Value Management modelling to balance risk and value for money and provide audit trail of decisions and up-to-date cost/budget/cashflow & whole-life forecasts/design proposals

+ + +

**Management of progress:** Continually validating designs/programme ensuring properly co-ordinated and integrated. + + +

**Reporting:** Provide report on project approval/compliance with client/stakeholder targets/objectives, obtaining approvals as appropriate and supporting client making informed decisions/approval to proceed.

+ + +

**Contingency planning:** to mitigate any impact of parties' failure to agree to proceed. Includes determining/agreeing suitable corrective action and monitor its implementation

+ + +

**Contract management:** Oversee the preparation/execution of contract documents including checking appropriate inclusions, approvals, insurances etc, and their execution by the client's Legal advisers. Check all contract documents properly executed before work begins on site. Instigate corrective action where necessary

+ + +

**Statutory Consents:** Provide support to the team in securing any required statutory consents (including the planning application).

+ + +

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Lot 1: Scope of Services

Scape Consultancy Framework – Built Environment 6

**Operation and Maintenance (O&M) Strategy:** Development of O&M strategy, handover strategy, testing and commissioning. + + +

**Social Value update:** Provide client with update on Social Value data through use of our bespoke Social Value App. + + +

**Value for Money update:** Provide client with update on VfM data through use of our VfM Tool. + +

+

**Scape Engage Portal:** Tender opportunities for supply chain advertised on our bespoke Engage Portal Dynamic Purchasing System.

+ + +

**Benefits review:** Review of progress against intended benefits considers time, tools and resource needed. + + +

**Engagement with end-user community:** Engage with end-user community to enable users to be key influencers in design development.

+ + +

**Lessons learnt and client satisfaction:** Manage lessons learnt and client satisfaction process. + +

+

**Manufacturing and Construction (stage 5) D&B**

1

**D&B**

2

**Trad**

**Leadership:** Lead/support the project, tracking actions against roles/responsibilities including management and administration of construction contracts and coordination of 3<sup>rd</sup> party providers/stakeholders.

+ + +

**Providing client/stakeholders with technical advice/reports:** Support the client, advising of its statutory (HSEQ) responsibilities, suitability of Contractor/design team proposals, programmes etc with recommendations to resolve areas of concern.

+ + +

**Monitoring:** Regularly review and update Project Execution plan including Risk Register, Quality Plan, Health and Safety & Environmental Strategies

+ + +

**Coordination between parties:** arrange meetings/dialogue and monitor timely provision of client/stakeholder information and approvals

+ + +

**Reporting:** Monitor/track progress providing appropriate reporting and risk/opportunity management, using early warnings etc. Supporting client and instigating corrective actions

+ + +

**Maintain effective communication channels between parties:** + + +

**Management:** Oversee/report on contractual processes including certification, assessments, monitoring HSEQ compliance, costs to budget, variations/CEs, programme monitoring/acceptance, sub-contractor approvals, risk management, final account etc

+ + +

**Government Soft Landings:** Finalise end user training, occupation and aftercare programme in line with Government Soft Landings Strategy.

+ + +

**Engage end-use community:** Engage end users to allow for a smooth transition at handover. + + +

**Media engagement:** Media engagement to foster goodwill in the community and celebrate success.

+ + +

**Lessons learnt and client satisfaction:** Manage lessons learnt and client satisfaction process. + +

+

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Lot 1: Scope of Services

Scape Consultancy Framework – Built Environment 7

**Handover and Use (stages 6 & 7) D&B**

1

**D&B**

2

**Trad**

**Handover control:** Oversee handover and commissioning processes, including preparation of client/end-users, a Handover

Report for the client's approval, provision of training/O&Ms, CAFM/COBie, 'as built', H&S File etc.

Arrange and attend handover

meeting with the project team and client capturing lessons learned etc.

+ + +

**Post-handover management:** Monitor contractor's aftercare/corrective work during the defects liability period, actions by endusers/

3<sup>rd</sup> parties including overseeing handover and aftercare activities including defects corrections, issue of certificates,

manuals, POE surveys, as-built drawings/CAFM/COBie data etc as per Project Execution Plan

+ + +

**Effective closure of project:** Oversight of commercial settlements, storage of certificates, manuals, as-builts, CAFM updates etc

+ + +

**Verify project outcomes:** Verify project outcomes including sustainability to provide positive community, environmental and economic outcomes.

+ + +

**Benchmarking report:** Support the preparation of the benchmarking report to provide future framework projects with valuable performance data.

+ + +

**Aftercare tasks:** Support aftercare tasks including post occupancy evaluation and enhanced aftercare checks after 12 and

24 months. Engage with FM team, client team and end-users to ensure optimal asset performance.

+ + +

**Complete post project review:** Complete post project review, benefits realisation and customer listening process. + + +

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Lot 1: Scope of Services

Scape Consultancy Framework – Built Environment 8

**Quantity Surveying**

**The Consultant may be appointed as part of the Client's design team or as a Client Adviser to support Contractor-led/Design & Build solutions to fulfil Quantity Surveying duties.**

**The Consultant's Quantity Surveying team will be under the direction of the client's Lead Adviser. Under a construction contract the Quantity Surveyor would support or fulfil the Contract Lead role i.e. JCT Contract Administrator or NEC Project Manager.**

**As part of this role the Consultant should expect to deliver the following Quantity Surveying outcomes/actions.**

**Generally D&B**

**1**

**D&B**

**2**

**Trad**

**Technical expertise:** The Quantity Surveyor will provide technical commercial/cost advice at each stage of a project advising the client, stakeholders and design team on market intelligence, historic reference costs/benchmarks, forecast trends and suitability of cost proposals, budgets etc. The Quantity Surveyor may work alongside a Lead Adviser for the client providing cost advice with some and/or all of the other design disciplines provided by the Client or Contractor.

**+ + +**

**Contract Management:** provide contract management duties for commercial activities, otherwise supporting their fulfilment by others. Duties and deliverables as appropriate to the main form of contract e.g. NEC ECC Project Manager or NEC PSC Service Manager commercial duties, JCT Contract Administrator etc. Includes coordinating with other contract roles.

**+ + +**

**Collaborative working:** support effective collaboration between parties at each stage focusing on discharging appropriate Plan of Work Strategies to deliver project success through combined skills of project stakeholders including design team, contractor(s), specialists, supply-chain etc.

**+ + +**

**Attendance/engagement:** Attending meetings as required to ensure the project meets the client's commercial/cost requirements and delivers appropriate value for money standards.

**+ + +**

**Compliance:** Compliance with the statutory requirements, e.g. advising the client of its CDM obligations. **+ + +**

**Communication:** Maintaining effective communication with all project stakeholders throughout the life of the project. **+ + +**

**Management:** Maintaining effective cost management e.g. commercial control, procurement and modelling of risks and opportunities (risk and value management modelling) - monitoring payments to design team members, contractor(s), assessment of budget/contingency allowances and assessment of claims, compensation events etc.

**+ + +**

**Reporting:** Monitoring/providing reports on actual cost against cost plan/budget and regularly reporting to the client/PM **+ + +**

**BIM/Digital Execution:** Support the effective delivery of BIM Services on every Commission, and BIM Level 2 where requested. **+ + +**

**Plan of work:** Discharge appropriate Core Tasks and Core Statutory Processes from the RIBA 2020 Plan of Work to achieve appropriate Stage Outcomes in a timely and efficient manner.

**+ + +**

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Lot 1: Scope of Services

Scape Consultancy Framework – Built Environment 9

**Common data environment:** Supporting the procurement and implementation of a common data environment platform. + + +

**Conduct initiation workshops:** Workshops to be carried out to include Value for Money, Social Value, Sustainability, Collaboration and Best Practice.

+ + +

**Data collection:** Collate wealth of data gathered from past projects to inform efficiencies on project in question. + + +

## **Strategic Definition & Preparation and Brief D&B**

1

### **D&B**

2

### **Trad**

**Effective means to develop appreciation of client and its project:** e.g. Discuss/map client's Requirements/Business Case, Strategic Brief and other core project requirements, including reporting cycles/client organisation structure/roles, timescale and any financial limits, whole-life targets; assess these and give general advice on how to proceed; maintain effective lines of communication.

+ + +

**Discharge responsibilities as allocated:** Diligently discharge project roles, responsibilities complying with communication methodology, common standards, Digital Execution/Building Information Modelling (BIM) and technology standards and strategy, schedules of services and initial project brief; agreeing strategy/actions to efficiently meet/deliver project and quality objectives and success criteria (e.g. sustainability outcomes, programme, whole-life cost and quality).

+ + +

**Contributing to development of project execution plan:** identify the various commercial actions/requirements at each stage including preparing proposals for additional research, surveys, investigations and Risk and Value Management Modelling etc

+ + +

**Communication:** use agreed communication channels for effective collaboration between parties. +

+ +

**Supporting development of most appropriate strategies:** Providing client/stakeholders with accurate and appropriate technical advice/reports e.g. preliminary commercial advice; national and regional cost trends, effect of market conditions; provide elemental cost advice and guidance on alternative building design and methods; consider any implications on programme; prepare initial budget estimate to test the feasibility proposals; prepare a preliminary cost plan and cash flow forecast

+ + +

**Value management/optioneering:** Confer with the client and other parties including stakeholders and members of the project team on the options and alternative methods to meet client's requirements having regard to the means of procuring, types of contract, timing, funding, resources, site conditions etc

+ + +

**Test client's brief:** Test client's brief to explore available efficiencies with property portfolio and alternative methods of project delivery.

+ + +

**Challenge brief:** Continual challenge of the brief to check that capital expenditure is focussed on added value. + + +

**Benchmarking:** Produce initial benchmarking proposals to test budget against data to offer cost certainty. + + +

**Cost in-use studies:** Early cost in-use studies to support sustainability objectives to provide full consideration of total project costs.

+ + +

**ISO44001 Collaboration Workshop:** In addition to the collaboration review we will conduct an ISO44001 collaboration workshop to ensure the project adheres to accredited standards and status.

+ + +

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Lot 1: Scope of Services

Scape Consultancy Framework – Built Environment 10

**Best Practice Workshop:** Conduct a best practice workshop to identify innovations and best practice solutions to be adopted into project delivery.

+ + +

**Social Value Workshop and Report:** Conduct a Social Value workshop and produce a report to capture social value features most relevant to the client and project.

+ + +

**Value for Money Workshop and Report:** Conduct a Value for Money workshop and produce a report to capture areas where VfM can be achieved at an early stage.

+ + +

**Sustainability and Carbon Reduction Plan:** Review sustainability and carbon plan for the project to ensure sustainability, environmental enhancement and carbon reduction are embedded into the scheme.

+ + +

**Manage lessons learnt and client satisfaction process:** Identify lessons learnt and client satisfaction scores from previous projects at an early stage.

+ + +

**Concept Design, Spatial Coordination and Technical Design D&B**

1

**D&B**

2

**Trad**

**Procurement:** procurement of client advisers including design team, technical specialists and contractor(s) where applicable, including preparation of PQQs/tender/mini-competition documents, PQQ & tender (MEAT) or direct award assessments, reports and recommendations. Advice to support most effective contracting model, form of contract etc, providing information on contractual responsibilities to support informed decision making.

+

**Procurement:** procurement of client advisers including concept designers, technical specialists, and contractor(s) where applicable, including preparation of PQQs/tender/mini-competition documents, PQQ & tender (MEAT) or direct award assessments, reports and recommendations. Advice to support most effective contracting model, form of contract etc, providing information on contractual responsibilities to support informed decision making. Overseeing or undertaking any novations of client design team members and overseeing procurement of Contractor's design team as required.

+ +

**Teambuilding:** Assist onboarding of new project team members including Contractor, working to establish reporting/communication channels between parties and cultural alignment

+

**Teambuilding:** Whenever Contractor appointed, work with Contractor, supporting onboarding of all new project team members, ensuring all roles, responsibilities, reporting/communication channels between parties appropriately allocated and cultural alignment

+ +

**Communication & collaboration:** Monitoring and maintain effective communication/information exchange/collaboration between parties such as design data

+ + +

**Commercial management:** Prepare/monitor/update cost plan/budget breakdown/whole-life forecasts/contingency planning/programme for client approval. Using tools such as collaborative working, Risk and Value Management modelling to balance risk and value for money and provide audit trail of decisions and up-to-date cost/budget/cashflow & whole-life forecasts/design proposals

+

**Commercial management:** Prepare initial cost plans/budget breakdowns/whole-life forecasts/contingency planning/programme for client approval. Monitor and update Contractor's development of costs using tools such as Risk and Value Management

+ +

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Lot 1: Scope of Services

Scape Consultancy Framework – Built Environment 11

modelling to validate risk and value for money balance, auditing decisions/proposals and ensuring Contractor provides up-to-date cost/budget/cashflow & whole-life forecasts/design proposals

**Management of progress:** Continually monitoring/validating costs against designs/programme ensuring properly co-ordinated and achievable.

+ + +

**Reporting:** Provide detailed cost statement/contract sum analysis on project approval/compliance with client/stakeholder commercial/value targets/budget objectives, obtaining tender and direct award approvals as appropriate and supporting client making informed decisions/approval to proceed.

+ + +

**Value Management/optioneering:** Working with client and stakeholders including client advisers/design team and Contractor to obtain agreement to any budget variances or in consultation with the other members of the project team reduce the scope of the project to come within the approved budget.

+

**Value Management/optioneering:** Working with client and stakeholders including client adviser, the Contractor and its design team and to obtain agreement to any budget variances or in consultation with the other members of the project team reduce the scope of the project to come within the approved budget.

+ +

**Contingency planning:** to mitigate any impact of parties' failure to agree to proceed. Includes determining/agreeing suitable corrective action and monitor its implementation

+ + +

**Contract management:** Oversee the preparation/execution of contract documents including checking appropriate inclusions, exclusions, supply-chain costs, risk inclusions/contingencies, approvals, insurances etc, and the execution of contracts by the client's Legal advisers. Agree the Tendered Total of the Prices for the agreed scheme with the Contractor, including making any adjustments necessary as instructed by the client, and prepare and submit a report on the Tendered Total to the client

+ + +

**Coordination/validation:** Re-examine, in consultation with the client and design team, the overall construction proposals including programme, costs and determine ability to meet client/stakeholders' objectives/requirements.

+ + +

**Interactive cost models:** Establish interactive cost models to provide timely investigation of multiple options of cost models. + + +

**Total cost reports:** Author total cost reports to provide single point of responsibility to avoid oversights. + + +

**Brief modifications:** Capture modifications to the brief to secure best value. + + +

**MEP cost advice:** Provide MEP cost advice. Cost controlling engineering to provide project savings.

+ + +

**Assess evolving design:** Assess evolving design and cost against internal data to drive efficiency into design. + + +

**Market testing:** Market test costs to provide reliable cost data that acknowledges supply chain. + + +

**Preliminaries book:** Produce preliminaries book based on knowledge from open book contract. + + +

**Early supply chain engagement:** Early supply chain engagement to secure best price from pool of contractors. + + +

**Social Value update:** Provide client with update on Social Value data through use of our bespoke Social Value App. + + +

**Value for money update:** Provide client with update on VfM data through use of our VfM tool. + + +

**Lessons learnt and client satisfaction:** Manage lessons learnt and client satisfaction process. + + +

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Lot 1: Scope of Services

Scape Consultancy Framework – Built Environment 12

**Manufacturing and Construction D&B**

1

**D&B**

2

**Trad**

**Providing client/stakeholders with technical commercial advice/reports:** Support the client and design team, advising on commercial aspects, suitability of Contractor/design team proposals/compensation events/quotations, programmes etc with recommendations to resolve areas of concern.

+ + +

**Coordination between parties:** attend meetings between parties + + +

**Reporting:** Monitor/track progress providing monthly financial statements projecting the anticipated total final cost including fees, furniture, equipment and other direct payments and report to the client, including an assessment of the forecast cash flow for the remainder of the project. Supporting client and instigating corrective actions

+++

**Maintain effective communication between parties:** +++

**Management:** Oversee/report on commercial processes including monitoring HSEQ compliance, costs to budget, variations/CEs. Monitor any over-run on the contract period, which is not sanctioned by a formal extension of time, issued by the Contract Administrator. Failing which, recommend to the client the deductions of liquidated and ascertained damage for the unextended period.

+++

**Change control:** Receiving, logging and costing all change proposals with contractor. +++

**Collaboration workshop:** Collaboration workshops throughout construction to provide a team approach to overcoming any issues that arise during construction.

+++

**Change management system:** Input initiatives into change management system to explore solutions where joint benefits are derived but project objectives not impacted.

+++

**Lessons learnt and client satisfaction:** Manage lessons learnt and client satisfaction process. ++

+

**Handover and Use D&B**

1

**D&B**

2

**Trad**

**Post-handover commercial management:** Prepare final account in collaboration with the Contractor. Prepare a cost analysis of the final account in BCIS elemental format in conjunction with the project team

+++

**Reporting:** Prepare final account report including a statement of direct payments and submit to the client and Contract Lead e.g. NEC Project Manager or JCT Contract Administrator as appropriate.

+++

**Project close out and benchmarking:** Produce benchmarking value report to provide future framework projects with valuable data.

+++

**Social Value achievements:** Produce final social value report to understand impact of social value drivers that provide positive impact on community, environmental and economic outcomes.

+++

**Project aftercare:** Support aftercare tasks inc. post occupancy evaluation and enhanced aftercare checks where required. +++

**Post project review:** Complete post project review, benefits realisation and customer listening process. +++

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Lot 1: Scope of Services

Scape Consultancy Framework – Built Environment 13

**Building Surveying**

The Consultant will be responsible for all aspects of the design other than that normally carried out by mechanical and electrical engineers and structural engineers. Specialist consultants (e.g. for asbestos analysis, legionella testing) will be appointed in consultation with the Consultant's Building Surveyor team.

The Consultant's Building Surveying team may be appointed independently, as part of the Client's design team or as a Client Adviser to support Contractor-led/Design & Build solutions.

Where other design contributors are appointed, the Building Surveyor may be required to act as Lead Designer and in addition to any duties listed below, will co-ordinate and integrate the work of other design contributors however employed. As part of this role the Consultant should expect to deliver the following Building Surveyor outcomes/actions.

**Generally D&B**

**1**

**D&B**

**2**

**Trad**

**Leadership:** Acting as client's **Lead Adviser** and/or **Lead Designer**, co-ordinating and integrating the work of client's advisers, design team members and other parties however employed. It must have and maintain communication and management review procedures to satisfy itself that all stages of the design team, Contractor and any 3<sup>rd</sup> parties' work can be achieved within the programmed period.

**+ + +**

**Collaborative working:** support effective collaboration between parties at each stage focusing on discharging appropriate RIBA

Plan of Work Strategies to deliver project success through combined skills of project stakeholders including design team, contractor(s), specialists, supply-chain etc.

**+ + +**

**Strategy Planning/Monitoring:** Working with client and stakeholders to establish appropriate RIBA Plan of Work Strategies and

oversee their fulfilment of the course of the Project. For example, agreement of Strategies for Sustainability, Soft Landing/Plan

for Use etc, benchmarking progress with RIBA's Building in Quality or similar management tools.

**+ + +**

**Project Management:** Effective management project e.g. programme and commercial control and procurement - monitoring

payments to design team members, and preparing and maintaining the programmes of stakeholder engagement activities,

design, Digital Execution/BIM etc, and timely procuring of each consultant, contractor, specialist etc.

**+ + +**

**Contract Management:** fulfil contract management (**Contract Lead**) duties, as appropriate to the main form of contract with the

contractor e.g. NEC ECC Project Manager, NEC PSC Service Manager, JCT Contract Administrator etc. Includes coordinating

with or providing other contract roles, e.g. Supervisor etc

**+ + +**

**Attendance/engagement:** activities should include convening/arranging and attending/chairing meetings as necessary to

effectively deliver the client's requirements, for example: client/stakeholder engagement, Soft Landing/Plan for Use, Design,

Digital Execution/BIM, Project, Site Logistics/constraints, and others. Associated activities include taking/issuing comprehensive

notes of each meeting and maintaining meetings are well facilitated and productive.

**+ + +**

Lot 1: Scope of Services

Scope Consultancy Framework – Built Environment 14

**BIM/Digital Execution:** Support the effective delivery of BIM Services on every Commission, and BIM Level 2 where requested. + + +

**Design Management:** Lead and co-ordinate design work done by the design team, contractor's design contributors, specialist

3<sup>rd</sup> party contractors, etc. Obtain quotations and other information in connection with specialist work.

+

**Design Management:** Lead and co-ordinate design work done by the client's design team. Monitor ongoing development of

Contractor's Design.

Obtaining quotations and other information in connection with specialist work prior to the Contractor's appointment.

+ +

**Compliance:** with HSEQ requirements including the CDM Regulations insofar as they relate to this Service and liaise with the project team to advise the client of its statutory obligations.

+

**Compliance:** with HSEQ requirements including the CDM Regulations insofar as they relate to this Service and liaise with the

project team to advise the client of its statutory obligations. *The Building Surveyor will undertake the role of Principal Designer*

*under the CDM Regulations unless/until this is taken on by the contractor during the project development.*

+ +

**Plan of work:** Discharge appropriate Core Tasks and Core Statutory Processes from the RIBA 2020 Plan of Work to achieve

appropriate Stage Outcomes in a timely and efficient manner.

+

**Plan of work:** Discharge appropriate Core Tasks and Core Statutory Processes from the RIBA 2020 Plan of Work to achieve

appropriate Stage Outcomes in a timely and efficient manner unless Tasks and Processes allocated to Contractor/Contractor's design team.

+ +

**Supervision:** Where requested, fulfil the NEC Supervisor or Clerk of Works duties, otherwise supporting their fulfilment of by others.

+ + +

**Providing client/stakeholders with technical advice/reports:** Providing technical advice and expertise at each stage of a project

advising the client, stakeholders and design team on market intelligence, historic reference projects/benchmarks, forecast trends and

suitability of design proposals, budgets etc. May need to work alongside Lead Adviser with some and/or all of the other design team

members including contributors for contractor design portions/ECI. Will also brief/support client staff, examine reports/studies etc,

monitor implementation and supervise progress to next stage.

+

**Providing client/stakeholders with technical advice/reports:** Providing technical advice and expertise at each stage of a project

advising the client, stakeholders and design team on market intelligence, historic reference projects/benchmarks, forecast trends and

suitability of design proposals, budgets etc. May need to work alongside Lead Adviser with some and/or all of the other client advisers

and design disciplines provided by the Contractor. Will also brief/support client staff, examine reports/studies etc, monitor implementation and supervise progress to next stage.

**+ +**

**Common data environment:** Supporting the procurement and implementation of a common data environment platform. **+ + +**

**Conduct initiation workshops:** Workshops to be carried out to include Value for Money, Social Value, Sustainability, Collaboration and Best Practice

**+ + +**

**Strategic Definition & Preparation and Brief D&B**

**1**

**D&B**

**2**

**Trad**

**Effective means to develop appreciation of client and its project:** e.g. Discuss/map client's Requirements/Business Case, **+ + +**

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Lot 1: Scope of Services

Scape Consultancy Framework – Built Environment 15

Strategic Brief and other core project requirements, including reporting cycles/client organisation structure/roles, timescale and

any financial limits, whole-life targets; assess these and give general advice on how to proceed; establish stakeholders and lines of communication.

**Early Contractor Involvement:** engagement of shortlisted/potential direct award contractor(s) where required by client **+ + +**

**Due diligence:** Carry out site appraisal and obtain/investigate any reasonably accessible data and information relating to the

project and relevant to the works. E.g. asbestos surveys/Health and Safety files, or ownership and any lessors and lessees of

the site, any existing buildings on the site, boundary fence and other enclosures, any known easements, encroachments, underground services, rights of way, rights of support or other relevant matters

**+ + +**

**Discharge responsibilities as allocated:** Diligently discharge project roles, responsibilities complying with communication

methodology, common standards, Digital Execution/Building Information Modelling (BIM) and technology standards and strategy,

schedules of services/Scope and initial project brief; agreeing strategy/actions to efficiently meet/deliver project and quality

objectives and success criteria (e.g. sustainability outcomes, programme, whole-life cost and quality).

If **Lead Designer**, establish

responsibilities and oversee team's discharge of duties.

**+ + +**

**Collaborative review:** Undertake, with other client advisers and design team members where appointed, technical appraisals

as may be necessary to determine the feasibility of the client's design solution requirements such as BREEAM, Passivhaus, programmes, budgets etc.

**+**

**Collaborative review:** Undertake, with other client advisers and (contractor/contractor's team where appointed) technical

appraisals as may be necessary to determine the feasibility of the client's design solution

requirements such as BREEAM,

Passivhaus, programmes, budgets etc.

**+ +**

**Executing strategies /adding value:** develop strategies/project execution plan for the project's execution and use in accordance with the client's brief and stakeholder's objectives; identify the various actions at each stage including proposals for additional research, surveys, investigations and Risk and Value Management Modelling, etc. For example, agree Sustainability Strategy, Maintenance & Operational Strategy, Handover Strategy etc

+ + +

**Communication:** confirm communication channels including reporting and authorisation procedures to operate with the client, maintaining effective communication between parties.

+ + +

**Supporting development of most appropriate strategies:** Providing client/stakeholders with accurate and appropriate technical advice/reports; consider any implications on programme; prepare initial budget estimate to test the feasibility proposals; prepare a preliminary cost plan and cash flow forecast.

+ + +

**Value Management/Optioneering:** Confer with the client and other members of the project team on the options and alternative methods of meeting the client's requirements having regard to the means of procuring, types of contract, timing, funding, resources, site conditions etc.

+ + +

**ISO44001 Collaboration Workshop:** In addition to the collaboration review we will conduct an ISO44001 collaboration workshop to ensure the project adheres to accredited standards and status.

+ + +

**Employers Information Requirements (EIRs):** Develop EIRs to give clarity on information formats.

+ + +

**Asset Security Manager:** Built Asset Security Manager Audit to develop innovation, sustainability and growth objectives. + + +

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Lot 1: Scope of Services

Scape Consultancy Framework – Built Environment 16

**Information Delivery Plan:** Develop Information Delivery Plan to manage the delivery of information.

+ + +

**BIM protocol:** Develop BIM protocol to identify common practices throughout project delivery. + + +

**Develop Government Soft Landings Strategy:** Early engagement and planning for the project's Government Soft Landings Strategy to prepare for successful handover and operation.

+ + +

**Review of legal matters:** Review legal matters to give confidence the project adheres to all legal requirements + + +

**Statutory consents:** Appraise statutory consents including planning to ensure project is delivered in line with time requirements. + + +

**Social Value Workshop and Report:** Conduct a Social Value workshop and produce a report to capture social value features most relevant to the client and project.

+ + +

**Value for Money Workshop and Report:** Conduct a Value for Money workshop and produce a report to capture areas where VfM can be achieved at an early stage.

+ + +

**Best Practice Workshop:** Conduct a best practice workshop to identify innovations and best practice solutions to be adopted

into project delivery.

**+++**

**Sustainability and Carbon Reduction Plan:** Review sustainability and carbon plan for the project to ensure sustainability, environmental enhancement and carbon reduction are embedded into the scheme.

**+++**

**Manage lessons learnt and client satisfaction process:** Identify lessons learnt and client satisfaction scores from previous projects at an early stage.

**+++**

## **Concept Design, Spatial Coordination and Technical Design D&B**

**1**

### **D&B**

**2**

### **Trad**

**Establishing the team/Procurement:** Leading procurement of client advisers including design team, technical specialists, and contractor(s) where applicable, including tender (MEAT) or direct award assessments including reports and recommendations.

**+**

**Establishing the team/Procurement:** Leading procurement of client advisers including concept designers, technical specialists, and contractor(s), including tender (MEAT) or direct award assessments, reports and recommendations. Overseeing or undertaking any novations and/or Contractor's procurement of design contributors

**++**

**Teambuilding:** Onboard all new project team members including Contractor, confirming roles, responsibilities, reporting/communication channels between parties and ensuring cultural alignment

**+**

**Teambuilding:** Whenever Contractor appointed, work with Contractor, supporting onboarding of all new project and/or design team members, ensuring all roles, responsibilities, reporting/communication channels between parties appropriately allocated and cultural alignment

**++**

**Clarify brief:** Agree the scope of the specifications/Scope/Works Information and co-ordination of drawings with particular reference any specialist works/services, working with Client and stakeholders including end-users, client advisers/design team and contractor, as appropriate to procurement route.

**+++**

**Communication & collaboration:** Monitor and maintain effective communication/information exchange/collaboration between parties such as design data

**+**

**Communication & collaboration:** Support effective communication/information exchange/collaboration between parties such **++**

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Lot 1: Scope of Services

Scape Consultancy Framework – Built Environment 17

as overseeing transfer of design data, intellectual property, documents, and records to Contractor.

**Concept Design:** With other stakeholders including end-users, client advisers/design team members, Contractor etc develop a concept design from the outline proposals taking into account amendments requested by the client; where applicable give an indication of timetable for the project; obtain approval of the client.

+

**Concept Design:** Where Contractor appointed, work with Contractor and other stakeholders to support development of concept design from the outline proposals taking into account amendments requested by the client. Where no Contractor appointed, as client led activities.

+ +

**Commercial management:** Analyse the client's requirements, ensure design meets client's whole-life requirements. Oversee preparation/monitor/updates to cost plan/budget breakdown/whole-life forecasts/contingency planning/programme for client approval. Maintain Risk and Value Management modelling to balance risk and value for money and provide audit trail of decisions and up-to-date cost/budget/cashflow & whole-life forecasts/design proposals.

+

**Commercial management:** Analyse the client's requirements, ensure Contractor's design meets client's whole-life requirements. Oversee/monitor Contractor's preparation/updates to cost plan/budget breakdown/whole-life forecasts/contingency planning/programme for client approval. Using Risk and Value Management modelling to validate risk and value for money balance and auditing decisions and ensuring Contractor's cost/budget/cashflow & whole-life forecasts reflect latest design proposals.

+ +

**Due diligence:** consult with appropriate statutory bodies, specialists etc such as BREEAM Assessor, Fire Officer, Highways, Planner etc – ensuring proposals meet requirements, approvals from Building Regulations, DQI, AEDET etc.

+

**Due diligence:** consult with appropriate statutory bodies, specialists etc such as BREEAM Assessor, Fire Officer, Highways, Planner etc – ensuring proposals meet requirements, approvals from Building Regulations, DQI, AEDET etc. Once appointed ensure Contractor maintains ongoing due diligence requirements

+ +

**Management of progress:** Continually validating designs/programme ensuring properly co-ordinated and integrated. + + +

**Reporting:** Prepare progress reports and final report to client, including fully developed brief, explanation of scheme, outline specification, estimate of cost of the building works and project plan and risks; highlighting project's compliance with client/stakeholder targets/objectives, obtaining approvals as appropriate and supporting client making informed decisions/approval to proceed.

+

**Reporting:** Prepare progress reports and final report to client, ensuring Contractor includes fully developed brief, explanation of scheme, outline specification, estimate of cost of the building works and project plan and risks. Support client by confirming project's compliance with client/stakeholder targets/objectives, obtaining approvals as appropriate and supporting client making informed decisions/approval to proceed.

+ +

**Spatial Coordination/Technical Design:** With other client advisers/design team members including contractor's design contributors where appointed, develop spatial coordination proposals, design and technical information to enable tenders to be

invited including drawings, schedules and specification of materials and standard of workmanship.

**+**

**Spatial Coordination:** With other client advisers/design team members and Contractor (where appointed), develop spatial coordination concept design and information to enable tenders to be invited including drawings, schedules and specification of materials and standard of workmanship as appropriate to required appointment stage.

**++**

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Lot 1: Scope of Services

Scape Consultancy Framework – Built Environment 18

If already appointed, oversee Contractor's development of spatial coordination proposals into technical design/production information.

**Package coordination:** Co-ordinate design work, from design team, contractor's Design contributors, specialist 3<sup>rd</sup> parties; obtain quotations and other information in connection with the electrical installations. Negotiate with the public and other utility authorities for provision of all necessary incoming services.

**+**

**Package coordination:** Monitor coordination of any design work. **++**

**Specialist procurement:** Where specialists are to be tendered separately obtain list of tenderers from the client or assist in the preparation of a tender list, invite tenders from approved contractors; appraise and report on tenders received. If necessary, contribute to negotiation of reductions in tenders, in consultation with the client, Lead Adviser, and/or Contract Lead e.g. NEC Project Manager or JCT Contract Administrator.

**+++**

**Procurement:** Monitor Contractor's procurement of packages, reviewing decisions on shortlisting, MEAT etc to ensure value for money optimised.

**++**

**Strategy planning/Monitoring:** Prepare, review and update Plan of Work Strategies, e.g. Construction, Sustainability Strategy, Maintenance and Operational Strategy and review Handover Strategy and Risk Assessments. Review and update Project Execution Plan. Consider and develop Construction Strategy, including off-site fabrication, component supply and availability and Health and Safety Strategy. Issue Final Project Brief. Use market testing/early contractor involvement and collaborative working to support development of most appropriate strategies

**+**

**Strategy planning/Monitoring:** Prepare, initial Plan of Work Strategies, e.g. Construction, Sustainability Strategy, Maintenance and Operational Strategy and review Handover Strategy and Risk Assessments. Work with Contractor to review and update Project Execution Plan and updates to strategies. Consider Contractor's proposals for off-site fabrication, component supply and availability and Health and Safety Strategy; issuing Final Project Brief. Use market testing/early contractor involvement and collaborative working to support development of most appropriate strategies

**++**

**Client approval:** Complete detailed cost statement/contract sum analysis on project approval/compliance with client/stakeholder commercial/value targets/budget objectives, obtaining tender or direct award approvals as appropriate and

supporting client making informed decisions/approval to proceed. Obtain the client's approval of the type of construction, quality of materials and standard of workmanship; liaise with the project team for any design work done by 3<sup>rd</sup> party specialist contractors and suppliers and obtain quotations and other information in connection with specialist work.

**+**

**Client approval:** Complete detailed cost statement/contract sum analysis on project approval/compliance with client/stakeholder commercial/value targets/budget objectives, obtaining tender or direct award approvals as appropriate and supporting client making informed decisions/approval to proceed. Support the client in the review/approval of the contractor's proposals for type of construction, quality of materials and standard of workmanship; liaise with the project team for any design work done by 3<sup>rd</sup> party specialist contractors and suppliers and obtain quotations and other information in connection with specialist work.

**++**

**Value Management/Optioneering:** Working with client and stakeholders to obtain agreement to any budget variances or in consultation with the other members of the project team reduce the scope of the project to come within the approved budget.

**+++**

**Contingency planning:** to mitigate any impact of parties' failure to agree to proceed. Includes determining/agreeing suitable **+++**

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Lot 1: Scope of Services

Scope Consultancy Framework – Built Environment 19

corrective action and monitor its implementation

**Contract management:** Oversee the preparation/execution of contract documents including checking appropriate inclusions, approvals, insurances etc, and their execution by the client's Legal advisers. Check all contract documents properly executed

before work begins on site. Instigate corrective action where necessary

**+++**

**Coordination/validation:** Re-examine, in consultation with the client and design team, the overall construction proposals including programme, costs and determine ability to meet client/stakeholders' objectives/requirements.

**+++**

**Review life cycle model:** Review life cycle model and benchmark against client's asset management plan. **+++**

**Planning application:** Support submission of the planning application. **+++**

**Benefits review:** Undertake benefits review to ensure project progress against intended benefits and to identify time and resource needed.

**+++**

**Statutory consents:** Interact with statutory bodies to ensure design meets requirements and the project is being delivered in line with time requirements.

**+++**

**3D drawings:** Produce 3D drawings for awareness of design, interfaces and clashes. **+++**

**Legal constraints:** Implement design to meet legal constraints to ensure project is delivered in line with legal requirements. **+++**

**Scape Engage Portal:** Tender opportunity advertised on our bespoke Engage Portal Dynamic Purchasing System. + + +

**Maintenance and Operational (O&M) Strategy:** Development of O&M strategy, handover strategy, testing and commissioning.

+ + +

**Social Value update:** Provide client with update on Social Value data through use of our bespoke Social Value App. + + +

**Value for money update:** Provide client with update on VfM data through use of our VfM tool. + + +

**Lessons learnt and client satisfaction:** Manage lessons learnt and client satisfaction process. + + +

+

## **Manufacturing and Construction D&B**

1

### **D&B**

2

### **Trad**

**Leadership:** Lead/support the project tracking actions against roles/responsibilities including management and administration of construction contracts and coordination of 3<sup>rd</sup> party providers and stakeholders.

+

**Leadership:** Lead/support the client's advisers/design team tracking Contractor's actions against roles/responsibilities including management and administration of construction contracts and coordination of 3<sup>rd</sup> party providers and stakeholders.

+ +

**Attendance:** Visit the works at appropriate intervals and inspect the progress and quality of the workmanship and materials for compliance with the contract documents and good building practice – fulfilling the role of NEC Supervisor or JCT Clerk of Works or supporting the fulfilment of this role when undertaken by others.

+ + +

**Monitoring:** Regularly review and update Project Execution Plan including Risk Register, Quality Plan, Health and Safety & Environmental Strategies

+ + +

**Providing client/stakeholders with technical advice/reports:** Support the client, advising of its statutory (HSEQ) responsibilities, suitability of Contractor/design team proposals, programmes etc with recommendations to resolve areas of

+ + +

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Lot 1: Scope of Services

Scape Consultancy Framework – Built Environment 20 concern.

**Coordination between parties:** arrange meetings/dialogue and monitor timely provision of client/stakeholder information and approvals

+ + +

**Reporting:** Monitor/track progress providing appropriate reporting and risk/opportunity management, using early warnings etc. Supporting client and instigating corrective actions

+ + +

**Maintain effective communication channels between parties:** + + +

**Management:** Oversee/report on commercial processes including monitoring HSEQ compliance, costs to budget, variations/CEs + + +

**Submit approval to the Client Information Manager (CIM):** Authorise outputs and submit for approval to the CIM to ensure client is informed on costs.

+ + +

**End-user engagement:** Engagement of end-users to allow a smooth transition at handover. + + +

**Government Soft Landings:** Finalise end user training, occupation and aftercare programme in line with Government

Soft Landings strategy for successful handover.

+ + +

**Lessons learnt and client satisfaction:** Manage lessons learnt and client satisfaction process. + +

+

**Handover and Use D&B**

1

**D&B**

2

**Trad**

**Handover control:** Oversee handover and commissioning processes, including preparation of client/end-users, a Handover

Report for the client's approval, provision of training/O&Ms, CAFM/COBie, 'as built', H&S File etc.

Arrange and attend handover

meeting with the project team and client, capturing lessons learned etc.

+ + +

**Post-handover management:** Monitored contractor's aftercare/corrective work during the defects liability period, actions by endusers/

3<sup>rd</sup> parties including Oversee handover and aftercare activities including defects corrections, issue of certificates, manuals,

POE surveys, as-built drawings/CAFM/COBie data etc as per Project Execution Plan

+ + +

**Post-handover commercial management:** Prepare final account in collaboration with the

Contractor. Prepare a cost analysis

of the final account in BCIS elemental format in conjunction with the project team

+ + +

**Effective closure of project:** Oversight of commercial settlements, storage of certificates, manuals, as-builts, CAFM updates

etc

+ + +

**Verify project outcomes:** Verify project outcomes against client drivers to ensure positive

community, environmental and

economic outcomes.

+ + +

**Benchmark report:** Prepare benchmark report to provide future framework projects with valuable data. + + +

**Digital Asset Plan:** Produce a Digital Asset Plan to provide accurate budget projections. + + +

**Support enhanced aftercare tasks:** Engagement with FM team, client team and end users to ensure optimal asset

performance and support enhanced building health check after 12 and 24 months.

+ + +

**Complete post project review:** Complete post project review, benefits realisation and customer listening process. + + +

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Lot 1: Scope of Services

Scape Consultancy Framework – Built Environment 21

**Architectural Design**

**Generally D&B**

1

## D&B

### 2

#### Trad

**Leadership:** Acting as client's **Lead Adviser** and/or **Lead Designer**, co-ordinating and integrating the work of client's advisers, design team members and other parties however employed. It must have and maintain communication and management review procedures to satisfy itself that all stages of the design team, Contractor and any 3<sup>rd</sup> parties' work can be achieved within the programmed period.

+ + +

**Representation:** Provide and maintain effective representation of the wider client's design team in all formal communications with the client. Communication protocols and procedures must therefore reflect a 360° collaborative strategy and capability.

+

**Representation:** Provide and maintain effective representation of the client's design team in all formal communications with the client until the Contractor and its design team are appointed. Once appointed the Architect will ensure the client's requirements are reflected in the Contractor's proposals. Communication protocols and procedures must therefore reflect a 360° collaborative strategy and capability.

+ +

**Attendance/engagement:** activities should include convening/arranging and attending/chairing meetings as necessary to effectively deliver the client's requirements, for example: client/stakeholder engagement, Soft Landing/Plan for Use, Design, Digital Execution/BIM, Project, Site Logistics/constraints, and others. Associated activities include taking/issuing comprehensive notes of each meeting and maintaining meetings are well facilitated and productive.

+ + +

**Strategy Planning/Monitoring:** Working with client and stakeholders including Contractor to establish appropriate Plan of Work Strategies and oversee their fulfilment of the course of the Project. For example, agreement of Strategies for achieving Sustainability Outcomes, Soft Landing/Plan for Use etc, benchmarking progress with RIBA's Building in Quality or similar management tools.

+ + +

**Collaborative working:** support effective collaboration between parties at each stage focusing on discharging appropriate Plan of Work Strategies to deliver project success through combined skills of project stakeholders including design team, contractor's design contributors, specialists, supply-chain etc.

+ + +

**Contract Management:** where requested provide contract management (**Contract Lead**) duties, otherwise supporting their fulfilment by others, as appropriate to the main form of contract e.g. NEC ECC Project Manager or NEC PSC Service Manager

+ + +

**The Consultant may be appointed as a member of Client's design team or as a Client Adviser to support Contractor Led/Design & Build solutions. The Consultant will be responsible for the architectural design of elements and sub-elements of the project excluding Mechanical, Electrical and/or the Structural Engineering.**

**The Consultant's Architectural Design Team may be required to act as the Lead Designer and in addition to any duties listed below, will coordinate**

**and integrate the work of other client advisers and design team members however employed. As part of this role the Consultant should expect to deliver the following Architectural Design outcomes/actions.**

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Lot 1: Scope of Services

Scape Consultancy Framework – Built Environment 22

commercial duties, JCT Contract Administrator etc. Includes coordinating with other contract roles.

**BIM/Digital Execution:** Support the effective delivery of BIM Services on every Commission, and BIM Level 2 where requested. + + +

**Design Management:** Lead and co-ordinate design work done by the client's advisers/design team, contractor's design contributors, specialist 3<sup>rd</sup> party contractors, etc. Obtain quotations and other information in connection with specialist work.

+

**Design Management:** Lead and co-ordinate design work done by the client's advisers/design team.

Monitor ongoing

development of Contractor's Design.

Obtaining quotations and other information in connection with specialist work prior to the Contractor's appointment.

+ +

**Compliance:** with HSEQ requirements including the CDM Regulations insofar as they relate to this Service and liaise with the project team to advise the client of its statutory obligations.

+

**Compliance:** with HSEQ requirements including the CDM Regulations insofar as they relate to this Service and liaise with the

project team to advise the client of its statutory obligations. *The Architect will undertake the role of Principal Designer under the*

*CDM Regulations unless/until this is taken on by the contractor during the project development.*

+ +

**Plan of work:** Discharge appropriate Core Tasks and Core Statutory Processes from the RIBA 2020 Plan of Work to achieve appropriate Stage Outcomes in a timely and efficient manner.

+

**Plan of work:** Discharge appropriate Core Tasks and Core Statutory Processes from the RIBA 2020 Plan of Work to achieve

appropriate Stage Outcomes in a timely and efficient manner unless Tasks and Processes allocated to Contractor/Contractor's design team.

+ +

**Supervision:** Where requested fulfil the NEC Supervisor or Clerk of Works duties, otherwise supporting their fulfilment of by others.

+ + +

**Providing client/stakeholders with technical advice/reports:** Providing technical advice and expertise at each stage of a project

advising the client, stakeholders and design team on market intelligence, historic reference projects/benchmarks, forecast trends and

suitability of design proposals, budgets etc. May need to work alongside Lead Adviser with some and/or all of the other design team

members including contributors for contractor design portions/ECI. Will also brief/support client staff, examine reports/studies etc,

monitor implementation and supervise progress to next stage.

+

**Providing client/stakeholders with technical advice/reports:** Providing technical advice and expertise at each stage of a project

advising the client, stakeholders and design team on market intelligence, historic reference projects/benchmarks, forecast trends and suitability of design proposals, budgets etc. May need to work alongside Lead Adviser with some and/or all of the other client advisers and design disciplines provided by the Contractor. Will also brief/support client staff, examine reports/studies etc, monitor implementation and supervise progress to next stage.

**+ +**

**Conduct initiation workshops:** Workshops to be carried out to include Value for Money, Social Value, Sustainability, Collaboration and Best Practice.

**+ + +**

**Sustainability and Carbon Reduction Plan:** Scope and plan sustainability and carbon delivery to ensure sustainability, environmental enhancement and carbon reduction are embedded into project delivery.

**+ + +**

**Strategic Definition & Preparation and Brief D&B**

**1**

**D&B**

**2**

**Trad**

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Lot 1: Scope of Services

Scape Consultancy Framework – Built Environment 23

**Effective means to develop appreciation of client and its project:** e.g. Discuss/map client's Requirements/Business Case, Strategic Brief and other core project requirements, including reporting cycles/client organisation structure/roles, timescale and any financial limits, whole-life targets; assess these and give general advice on how to proceed; establish stakeholders and lines of communication.

**+ + +**

**Due diligence:** Carry out site appraisal and obtain information on ownership and any lessors and lessees of the site, any existing buildings on the site, boundary fence and other enclosures, any known easements, encroachments, underground services, rights of way, rights of support or other relevant matters

**+ + +**

**Establishing clear responsibilities of each party:** Establishing project roles, responsibilities, communication methodology, common standards, Digital Execution Plan/Building Information Modelling (BIM) and technology standards and strategy, schedules of services and initial project brief; agreeing project and quality objectives and success criteria (e.g. sustainability outcomes, programme, whole-life cost and quality).

**+ + +**

**Executing strategies/adding value:** develop strategy/project execution plan for the project's execution and use in accordance with the client's brief and stakeholder's objectives; identify the various actions at each stage including proposals for additional research, surveys, investigations and Risk and Value Management Modelling, etc. For example, agree Sustainability Strategy, Maintenance & Operational Strategy, Handover Strategy etc

**+ + +**

**Value management/Optioneering:** Confer with the client and other members of the project team on the options and alternative methods of meeting the client's requirements having regard to the means of procuring, types of contract, timing, funding,

resources, site conditions etc

**+++**

**Collaborative review:** Undertake, with other appointed client advisers/design team members/Contractor Design Contributors etc, technical appraisals as may be necessary to determine the feasibility of the client's design requirements such as BREEAM, Passivhaus, programmes, budgets etc

**+**

**Collaborative review:** Undertake, with other client advisers/design team members and (contractor/contractor's team where appointed) technical appraisals as may be necessary to determine the feasibility of the client's design requirements such as BREEAM, Passivhaus, programmes, budgets etc

**++**

**Communication:** confirm communication channels including reporting and authorisation procedures to operate with the client, maintaining effective communication between parties.

**+++**

**Government Soft Landings:** Develop Soft Landings Strategy – early engagement and preparation for successful handover and operation.

**+++**

**ISO44001 Collaboration Workshop:** In addition to the collaboration review we will build in an ISO44001 collaboration workshop to ensure the project adhered to accredited standards and status.

**+++**

**Social Value Workshop and Report:** Conduct a Social Value workshop and produce a report to capture social value features most relevant to the client and project.

**+++**

**Value for Money Workshop and Report:** Conduct a Value for Money workshop and produce a report to capture areas where VfM can be achieved at an early stage.

**+++**

**Best Practice Workshop:** Conduct a best practice workshop to identify innovations and best practice solutions to be adopted into project delivery.

**+++**

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Lot 1: Scope of Services

Scape Consultancy Framework – Built Environment 24

**Sustainability and Carbon Reduction Plan:** Review sustainability and carbon plan for the project to ensure sustainability, environmental enhancement and carbon reduction are embedded into the scheme.

**+++**

**Manage lessons learnt and client satisfaction process:** Identify lessons learnt and client satisfaction scores from previous projects at an early stage.

**+++**

**Concept Design, Spatial Coordination and Technical Design D&B**

**1**

**D&B**

**2**

**Trad**

**Establishing the team/Procurement:** Leading procurement design team/client advisers, specialists, contractor(s), including

tender (MEAT) or direct award assessments, reports/recommendations and drawings and documents as required. Supporting team with identification of long lead/pre-ordered items or activities.

+

**Establishing the team/Procurement:** Leading procurement design team/client advisors, specialists, contractor(s), including tender (MEAT) or direct award assessments, reports/recommendations and drawings and documents as required. Overseeing any novations and/or Contractor's procurement of design contributors. Supporting team with identification of long lead/preordered items or activities.

++

**Clarify brief:** working with identified Stakeholders including client advisers, design team, Contractor, end-users etc to analyse and constructively challenge brief, establish room data sheets, whole-life performance/operational requirements etc

+++

**Teambuilding:** Onboard all new project team members including the Contractor, confirming roles, responsibilities, reporting/communication channels between parties and ensuring cultural alignment

+

**Teambuilding:** Whenever Contractor appointed, work with the Contractor, supporting onboarding of all new project team members, ensuring all roles, responsibilities, reporting/communication channels between parties appropriately allocated and cultural alignment

++

**Communication & collaboration:** Monitoring and maintain effective communication/information exchange/collaboration between parties such as design data to support development of concept design

+

**Communication & collaboration:** support effective communication/information exchange/collaboration between parties reviewing data/proposals for compatibility, ensuring parties benefit from specialist expertise, facilitating review workshops, peer reviews, etc

++

**Concept Design:** With other stakeholders including end-users, project team members etc develop a concept design from the outline proposals taking into account amendments requested by the client; where applicable give an indication of timetable for the project; obtain approval of the client.

+

**Concept Design:** Where Contractor appointed, work with Contractor and other stakeholders to support development of concept design from the outline proposals taking into account amendments requested by the client. Where no Contractor appointed, as client led/Traditional activities.

++

**Commercial management:** Analyse the client's requirements, ensure design meets client's whole-life requirements Oversee preparation/monitor/updates to cost plan/budget breakdown/whole-life forecasts/contingency planning/programme for client approval. Maintain Risk and Value Management modelling to balance risk and value for money and provide audit trail of decisions

+

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and up-to-date cost/budget/cashflow & whole-life forecasts/design proposals

**Commercial management:** Analyse the client's requirements, ensure Contractor's design meets client's whole-life requirements

Oversee/monitor Contractor's preparation/updates to cost plan/budget breakdown/whole-life forecasts/contingency

planning/programme for client approval. Using Risk and Value Management modelling to validate risk and value for money

balance and auditing decisions and ensuring the Contractor's cost/budget/cashflow & whole-life forecasts reflect latest design

proposals

**+ +**

**Due diligence:** consult with appropriate statutory bodies, specialists etc such as BREEAM Assessor, Fire Officer, Highways,

Planner etc – ensuring proposals meet requirements, approvals from Building Regulations, DQI, AEDET etc.

**+**

**Due diligence:** consult with appropriate statutory bodies, specialists etc such as BREEAM Assessor, Fire Officer, Highways,

Planner etc – ensuring proposals meet requirements, approvals from Building Regulations, DQI, AEDET etc. Once appointed

ensure Contractor maintains ongoing due diligence requirements

**+ +**

**Management of progress:** Continually validating designs/programme ensuring properly co-ordinated and integrated. **+ + +**

**Reporting:** Prepare progress reports and final report to client, including fully developed brief, explanation of scheme, outline

specification/Scope/Works Information, estimate of cost of the building works and project plan and risks; highlighting project's

compliance with client/stakeholder targets/objectives, obtaining approvals as appropriate and supporting client making informed

decisions/approval to proceed.

**+**

**Reporting:** Prepare progress reports and final report to client, ensuring Contractor includes fully developed brief, explanation of

scheme, outline specification/Scope/Works Information, estimate of cost of the building works and project plan and risks. Support

client by confirming project's compliance with client/stakeholder targets/objectives, obtaining approvals as appropriate and

supporting client making informed decisions/approval to proceed.

**+ +**

**Spatial Coordination/Technical Design:** With other client advisers/design team members including contractor's design

contributors where appointed, develop spatial coordination proposals, design and technical information to enable tenders to be

invited including drawings, schedules and specification of materials and standard of workmanship.

**+**

**Spatial Coordination:** With other client advisers/design team members and Contractor (where appointed), develop spatial

coordination concept design and information to enable tenders to be invited including drawings, schedules and specification of

materials and standard of workmanship as appropriate to required appointment stage.

If already appointed, oversee Contractor's development of spatial coordination proposals into technical design/production

information.

**+ +**

**Package coordination:** Co-ordinate design work, from design team, contractor's Design contributors, specialist 3<sup>rd</sup> parties;

obtain quotations and other information in connection with the electrical installations. Negotiate with the public and other utility authorities for provision of all necessary incoming services.

+

**Package coordination:** Monitor coordination of any design work. ++

**Specialist procurement:** Where specialists are to be tendered separately obtain list of tenderers from the client or assist in the preparation of a tender list, invite tenders from approved contractors; appraise and report on tenders received. If necessary, contribute to negotiation of reductions in tenders, in consultation with the client, Lead Adviser, and/or Contract Lead e.g. NEC Project Manager or JCT Contract Administrator.

+++

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Lot 1: Scope of Services

Scape Consultancy Framework – Built Environment 26

**Procurement:** Monitor Contractor's procurement of packages, reviewing decisions on shortlisting, MEAT etc to ensure value for money optimised.

++

**Strategy planning/Monitoring:** Prepare, review and update Plan of Work Strategies, e.g. Construction, Sustainability Strategy, Maintenance and Operational Strategy and review Handover Strategy and Risk Assessments. Review and update Project Execution Plan. Consider and develop Construction Strategy, including off-site fabrication, component supply and availability and Health and Safety Strategy. Issue Final Project Brief. Use market testing/early contractor involvement and collaborative working to support development of most appropriate strategies

+

**Strategy planning/Monitoring:** Prepare, initial Plan of Work Strategies, e.g. Construction, Sustainability Strategy, Maintenance and Operational Strategy and review Handover Strategy and Risk Assessments. Work with Contractor to review and update Project Execution Plan and updates to strategies. Consider the Contractor's proposals for off-site fabrication, component supply and availability and Health and Safety Strategy; issuing Final Project Brief. Use market testing/early contractor involvement and collaborative working to support development of most appropriate strategies

++

**Client approval:** Complete detailed cost statement/contract sum analysis on project approval/compliance with client/stakeholder commercial/value targets/budget objectives, obtaining tender or direct award approvals as appropriate and supporting client making informed decisions/approval to proceed. Obtain the client's approval of the type of construction, quality of materials and standard of workmanship; liaise with the project team for any design work done by 3<sup>rd</sup> party specialist contractors and suppliers and obtain quotations and other information in connection with specialist work.

+

**Client approval:** Complete detailed cost statement/contract sum analysis on project approval/compliance with client/stakeholder commercial/value targets/budget objectives, obtaining tender or direct award approvals as appropriate and supporting client making informed decisions/approval to proceed. Support the client in the review/approval of the contractor's proposals for type of construction, quality of materials and standard of workmanship; liaise with the project team for any design work done by 3<sup>rd</sup>

party specialist contractors and suppliers and obtain quotations and other information in connection with specialist work.

**++**

**Value Management/Optioneering:** Working with client and stakeholders to obtain agreement to any budget variances or in consultation with the other members of the project team reduce the scope of the project to come within the approved budget.

**+++**

**Contingency planning:** to mitigate any impact of parties' failure to agree to proceed. Includes determining/agreeing suitable corrective action and monitor its implementation

**+++**

**Contract management:** Oversee the preparation/execution of contract documents including checking appropriate inclusions, approvals, insurances etc, and their execution by the client's Legal advisers. Check all contract documents properly executed before work begins on site. Instigate corrective action where necessary

**+++**

**Coordination/validation:** Re-examine, in consultation with the client and design team, the overall construction proposals including programme, costs and determine ability to meet client/stakeholders' objectives/requirements.

**+++**

**Design development:** Develop design using BIM to inform the client with progress on budget, time and quality. **+++**

**Statutory approvals:** Statutory approvals strategy to ensure timely approvals. **+++**

**Operation and Maintenance (O&M) Strategy:** Development of O&M strategy, handover strategy, testing and commissioning. **+++**

**Scope Engage Portal:** Tender opportunity advertised on our bespoke Engage Portal Dynamic Purchasing System. **+++**

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Lot 1: Scope of Services

Scape Consultancy Framework – Built Environment 27

**Virtual Construction Model:** Produce Virtual Construction Model to reduce design risks. **+++**

**Benefits review:** Review of progress against intended benefits considers time, tools and resource needed. **+++**

**Social Value update:** Provide client with update on Social Value data through use of our bespoke Social Value App. **+++**

**Value for money update:** Provide client with update on VfM data through use of our VfM tool. **+++**

**Engagement with end-user community:** Engage with end-user community to enable users to be key influencers in design development.

**+++**

**Lessons learnt and client satisfaction:** Manage lessons learnt and client satisfaction process. **++**

**+**

**Manufacturing and Construction D&B**

**1**

**D&B**

**2**

**Trad**

**Leadership:** Lead/support the project team tracking actions against roles/responsibilities including management and administration of construction contracts and coordination of 3<sup>rd</sup> party providers and stakeholders.

**+**

**Leadership:** Lead/support the client's advisers/design team tracking Contractor's actions against roles/responsibilities including management and administration of construction contracts and coordination of 3<sup>rd</sup> party providers and stakeholders.

++

**Attendance:** Visit the works at appropriate intervals and inspect the progress and quality of the workmanship and materials for compliance with the contract documents and good building practice– fulfilling the role of NEC Supervisor or JCT Clerk of Works or supporting the fulfilment of this role when undertaken by others.

+++

**Monitoring:** Regularly review and update Project Execution Plan including Risk Register, Quality Plan, Health and Safety & Environmental Strategies

+++

**Providing client/stakeholders with technical advice/reports:** Support the client, advising of its statutory (HSEQ) responsibilities, suitability of Contractor/design team proposals, programmes etc with recommendations to resolve areas of concern.

+++

**Coordination between parties:** arrange meetings/dialogue and monitor timely provision of client/stakeholder information and approvals

+++

**Reporting:** Monitor/track progress providing appropriate reporting and risk/opportunity management, using early warnings etc. Supporting client and instigating corrective actions

+++

**Maintain effective communication channels between parties:** +++

**Management:** Oversee/report on commercial processes including monitoring HSEQ compliance, costs to budget, variations/CEs +++

**Government Soft Landings:** Finalise end user training, occupation and aftercare programme in line with Soft Landings strategy for successful handover.

+++

**Asset Information Model:** Check completeness of Asset Information Model to secure best outcomes for the client. +++

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Lot 1: Scope of Services

Scape Consultancy Framework – Built Environment 28

**Defects:** Proactive defects management. +++

**End-user engagement:** End-user engagement to allow a smooth transition at handover. +++

**Media engagement:** Media engagement to foster goodwill in the community and celebrate success.

+++

**Lessons learnt and client satisfaction:** Manage lessons learnt and client satisfaction process. ++

+

**Handover and Use D&B**

1

**D&B**

2

**Trad**

**Handover control:** Oversee handover and commissioning processes, including preparation of client/end-users, a Handover

Report for the client's approval, provision of training/O&Ms, CAFM/COBie, 'as built', H&S File etc.  
Arrange and attend handover meeting with the project team and client, capturing lessons learned etc.

**+++**

**Post-handover management:** Monitored contractor's aftercare/corrective work during the defects liability period, actions by endusers/  
3<sup>rd</sup> parties including Oversee handover and aftercare activities including defects corrections, issue of certificates, manuals,  
POE surveys, as-built drawings/CAFM/COBie data etc as per Project Execution Plan

**+++**

**Effective closure of project:** Oversight of storage of certificates, manuals, as-builts, CAFM updates etc **+++**

**Asset Information Model:** Handover of Asset Information Model to ensure client receives data and information to support operation of the facility.

**+++**

**Verify project outcomes:** Verify project outcomes against client drivers to ensure positive community, environmental and economic outcomes.

**+++**

**Benchmark report:** Prepare benchmark report to provide future framework projects with valuable data. **+++**

**Support enhanced aftercare tasks:** Engagement with FM team, client team and end users to ensure optimal asset performance and support enhanced building health check after 12 and 24 months.

**+++**

**Complete post project review:** Complete post project review, benefits realisation and customer listening process. **+++**

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Lot 1: Scope of Services

Scape Consultancy Framework – Built Environment 29

## **Mechanical Engineering**

**The Consultant will be responsible for all aspects of Mechanical Engineering.**

**The Consultant's Mechanical Engineering team may be appointed independently, as part of the Client's design team or as a Client Adviser to support Contractor-led/Design & Build solutions. The Lead Designer will co-ordinate and integrate Mechanical Engineering activities with the work of other design contributors however employed.**

**For projects where the services content forms the majority or all of the work relate to Mechanical Engineering the Consultant's Mechanical Engineering Team may be required to act as the Lead Designer and co-ordinate and integrate the work of other design contributors however employed.**

**As part of this role the Consultant should expect to deliver the following Mechanical Engineering outcomes/actions.**

**Generally D&B**

**1**

**D&B**

**2**

**Trad**

**Attendance/engagement:** activities should include convening/arranging and attending/chairing meetings as necessary to effectively deliver the client's requirements, for example: client/stakeholder engagement, Soft Landing/Plan for Use, Design, BIM/Digital Execution, Project, Site Logistics/constraints, and others. Associated activities include taking/issuing comprehensive notes of each meeting and maintaining meetings are well facilitated and productive.

+++

**Collaborative working:** support effective collaboration between parties at each stage focusing on discharging appropriate Plan of Work Strategies to deliver project success through combined skills of project stakeholders including design team, contractor(s), specialists, supply-chain etc.

+++

**Contract Management:** where requested provide contract management (**Contract Lead**) duties, otherwise supporting their fulfilment by others, as appropriate to the main form of contract e.g. NEC ECC Supervisor, Project Manager or NEC PSC Service Manager duties, JCT Contract Administrator, Clerk of Works etc. Includes coordinating with other contract roles.

+++

**BIM/Digital Execution:** Support the effective delivery of BIM Services on every Commission, and BIM Level 2 where requested. +++

**Design Management:** Lead and co-ordinate design or support coordination of Mechanical Engineering with design work done by the client's design team, contractor's design contributors, specialist 3<sup>rd</sup> party contractors, etc. Obtain quotations and other information in connection with specialist work.

+

**Design Management:** Lead and co-ordinate design or support coordination of Mechanical Engineering with design work done by the client's design team. Monitor ongoing development of Contractor's Mechanical Engineering Design. Obtaining quotations and other information in connection with specialist work prior to the Contractor's appointment.

++

**Compliance:** with HSEQ requirements including the CDM Regulations insofar as they relate to this Service and liaise with the +++

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project team to advise the client of its statutory obligations.

**Statutory compliance:** with HSEQ requirements including the CDM Regulations insofar as they relate to this Service and liaise with the project team to advise the client of its statutory obligations.

+++

**Supervision:** Where requested, fulfil the NEC Supervisor or Clerk of Works duties, otherwise supporting their fulfilment of by others.

+++

**Plan of work:** Discharge appropriate Core Tasks and Core Statutory Processes from the RIBA 2020 Plan of Work to achieve appropriate Stage Outcomes in a timely and efficient manner.

+

**Plan of work:** Discharge appropriate Core Tasks and Core Statutory Processes from the RIBA 2020 Plan of Work to achieve appropriate Stage Outcomes in a timely and efficient manner unless Tasks and Processes allocated to Contractor/Contractor's design team.

++

**Providing client/stakeholders with technical advice/reports:** Providing technical advice and expertise at each stage of a project advising the client, stakeholders and design team on market intelligence, historic reference projects/benchmarks, forecast trends and

suitability of design proposals, budgets etc. May need to work alongside Lead Adviser with some and/or all of the other design team members including contributors for contractor design portions/ECI. Will also brief/support client staff, examine reports/studies etc, monitor implementation and supervise progress to next stage.

**+**

**Providing client/stakeholders with technical advice/reports:** Providing technical advice and expertise at each stage of a project advising the client, stakeholders and design team on market intelligence, historic reference projects/benchmarks, forecast trends and suitability of design proposals, budgets etc. May need to work alongside Lead Adviser with some and/or all of the other client advisers and design disciplines provided by the Contractor. Will also brief/support client staff, examine reports/studies etc, monitor implementation and supervise progress to next stage.

**++**

**Common data environment:** Supporting the procurement and implementation of a common data environment platform. **+++**

**Conduct initiation workshops:** Workshops to be carried out to include Value for Money, Social Value, Sustainability, Collaboration and Best Practice.

**+++**

**Sustainability and Carbon Reduction Plan:** Scope and plan sustainability and carbon strategy to ensure sustainability, environmental enhancement and carbon reduction are embedded into project delivery.

**+++**

**Strategic Definition & Preparation and Brief D&B**

**1**

**D&B**

**2**

**Trad**

**Effective means to develop appreciation of client and its project:** e.g. Discuss client's Requirements/Business Case, Strategic Brief and other core project requirements, including reporting cycles/client organisation structure/roles, timescale and any financial limits, whole-life targets, construction strategy; assess these and give general advice on how to proceed; maintain effective lines of communication.

**+++**

**Due diligence:** Carry out site appraisal and obtain/investigate any reasonably accessible data and information relating to the project and relevant to the works. E.g. asbestos surveys/Health and Safety files, or ownership and any lessors and lessees of the site, any existing buildings and services on the site, boundary fence and other enclosures, any known easements,

**+++**

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Lot 1: Scope of Services

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encroachments, underground services, rights of way, rights of support or other relevant matters

**Commercial input:** Work with other client advisers/design team members & contributors/contractor/specialists to provide an

approximation of cost based upon unit volume, unit area or similar available statistics, cost for basic services, renewables, rain water

harvesting, Biomass as appropriate to meet whole-life requirements

**+++**

**Discharge responsibilities as allocated:** Diligently discharge project roles, responsibilities complying with communication methodology, common standards, Digital Execution/Building Information Modelling (BIM) and technology standards and strategy, schedules of services and initial project brief; agreeing strategy/actions to efficiently meet/deliver project and quality objectives and success criteria (e.g. sustainability outcomes, programme, whole-life cost and quality).

+ + +

**Add Value:** identify the various actions at each stage including proposals for additional research, surveys, investigations and Risk and Value Management Modelling, etc. For example agree Sustainability Strategy, Maintenance & Operational Strategy, Handover Strategy etc to meet the client's brief and stakeholders' objectives.

+ + +

**Value management/Optioneering:** Confer with the client and other parties including members of the design team, contractor etc., on the options and alternative methods of meeting the client's requirements having regard to the means of procuring, types of contract, timing, funding, resources, site conditions etc

+ + +

**Collaborative review:** Undertake, with other appointed client advisers/design team members/Contractor Design Contributors etc, technical appraisals as may be necessary to determine the feasibility of the client's mechanical engineering solution requirements such as BREEAM, Passivhaus, programmes, budgets etc

+

**Collaborative review:** Undertake, with other client advisers/design team members and (contractor/contractor's design team where appointed) technical appraisals as may be necessary to determine the feasibility of the client's mechanical engineering solution requirements such as BREEAM, Passivhaus, programmes, budgets etc

+ +

**Communication:** use agreed communication channels including reporting and authorisation procedures to operate with the client, maintaining effective communication between parties.

+ + +

**Government Soft Landings:** Develop Soft Landings Strategy – early engagement and preparation for successful handover and operation.

+ + +

**ISO44001 Collaboration Workshop:** In addition to the collaboration review we will build in an ISO44001 collaboration workshop to ensure the project adheres to accredited standards and status.

+ + +

**Social Value Workshop and Report:** Conduct a Social Value workshop and produce a report to capture social value features most relevant to the client and project.

+ + +

**Value for Money Workshop and Report:** Conduct a Value for Money workshop and produce a report to capture areas where VfM can be achieved at an early stage.

+ + +

**Best Practice Workshop:** Conduct a best practice workshop to identify innovations and best practice solutions to be adopted into project delivery.

+ + +

**Sustainability and Carbon Reduction Plan:** Review sustainability and carbon plan for the project to ensure sustainability, environmental enhancement and carbon reduction are embedded into the scheme.

+ + +

**Manage lessons learnt and client satisfaction process:** Identify lessons learnt and client satisfaction scores from previous projects at an early stage.

+ + +

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Lot 1: Scope of Services

Scape Consultancy Framework – Built Environment 32

**Concept Design, Spatial Coordination and Technical Design D&B**

1

**D&B**

2

**Trad**

**Support establishment of the team/Procurement:** supporting lead adviser/client design team members in procurement of other design team members, specialists, contractor(s), including tender (MEAT) or direct award assessments providing drawings and documents as required. Supporting team with identification of long lead/pre-ordered mechanical engineering items.

+

**Support establishment of the team/Procurement:** supporting lead adviser/client design team members in procurement of other design team members, specialists, contractor(s), including tender (MEAT) or direct award assessments providing drawings and documents as required. Supporting team with identification of long lead/pre-ordered items. Assisting any novations and/or Contractor's procurement of mechanical engineering design contributors Supporting team with identification of long lead/preordered items

+ +

**Teambuilding:** Assist onboarding of new project team members including Contractor, working to establish reporting/communication channels between parties and cultural alignment

+

**Teambuilding:** Whenever Contractor appointed, work with Contractor, supporting onboarding of all new project team members, ensuring all roles, responsibilities, reporting/communication channels between parties appropriately allocated and cultural alignment

+ +

**Clarify brief:** Agree the scope of the specifications/Scope/Works Information and co-ordination of drawings with the client's advisers/design team, with particular reference to mechanical services and specialist work affecting the structure.

+

**Clarify brief:** Agree the scope of the specifications/Scope/Works Information and co-ordination of drawings with the Contractor/Contractor's design team, with particular reference to mechanical services and specialist work affecting the structure.

+ +

**Due diligence:** Consult any local or any other authority necessary in connection with the mechanical design of the works and prepare details and calculations as necessary to the appropriate Authorities

+

**Due diligence:** Consult any local or any other authority necessary in connection with the mechanical design of the works and prepare details and calculations as necessary to the appropriate Authorities. Once appointed ensure Contractor maintains ongoing due diligence requirements

**+ +**

**Communication & collaboration:** Maintain effective communication/information exchange/collaboration between parties such as design data for the engineering services showing locations and approximate sizes of plant rooms, major items of plant, ducts and service run; also approximate weights of any item affecting architectural concepts and structural design to ensure compatibility.

**+**

**Communication & collaboration:** Maintain effective communication/information exchange/collaboration between parties reviewing data/proposals for compatibility, ensuring parties benefit from specialist expertise, facilitating specialist workshops, peer reviews etc

**+ +**

**Concept Design:** With other stakeholders including end-users, design team members, Contractor Design Contributors (where appointed) etc support development of concept design and prepare calculations (such as heating and cooling loads), drawings and specification of the works within the cost plan limit.

**+**

**Concept Design:** Where Contractor appointed, work with Contractor and other stakeholders to support development of concept design from the outline proposals taking into account amendments requested by the client and review Contractor's calculations (such as heating and cooling loads).

**+ +**

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Lot 1: Scope of Services

Scape Consultancy Framework – Built Environment 33

Where no Contractor appointed, as client led/Traditional activities.

**Commercial input:** In conjunction with client advisers/design team members & contributors/contractor/specialists providing advice on the cost for the mechanical design solution for the project.

**+ + +**

**Technical advice/design reviews:** Continually validating designs/programme such as evaluations of energy use and consumption calculations, advising the client's design team on energy conservation measure and ensuring design elements properly co-ordinated and integrated.

**+**

**Technical advice/design reviews:** Continually validating designs/programme such as evaluations of energy use and consumption calculations, advising the client's on the suitability of proposed energy conservation measures and ensuring design elements properly co-ordinated and integrated.

**+ +**

**Reporting:** Prepare progress reports and final report to client, including fully developed brief, explanation of scheme, outline specification/Scope/Works Information, estimate of cost of the building works and project plan and risks; highlighting project's compliance with client/stakeholder targets/objectives, obtaining approvals as appropriate and supporting client making informed

decisions/approval to proceed.

**+**

**Reporting:** Prepare progress reports and final report to client, ensuring Contractor includes fully developed brief, explanation of scheme, outline specification/Scope/Works Information, estimate of cost of the building works and project plan and risks. Support client by confirming project's compliance with client/stakeholder targets/objectives, obtaining approvals as appropriate and supporting client making informed decisions/approval to proceed.

**+ +**

**Spatial Coordination/Technical Design:** With other client advisers/design team members including contractor's design contributors where appointed, develop spatial coordination proposals, design and technical information to enable tenders to be invited including drawings, schedules and specification of materials and standard of workmanship. Submit final designs for each of the engineering services to be included in the works with the associated estimates and assist in preparation of report for the client.

**+**

**Spatial Coordination:** With other client advisers/design team members and Contractor (where appointed), develop spatial coordination concept design and information to enable tenders to be invited including drawings, schedules and specification of materials and standard of workmanship as appropriate to required appointment stage. If already appointed, oversee Contractor's development of spatial coordination proposals into technical design/production information. Assessing final designs for each of the engineering services to be included in the works with the associated estimates and assist in preparation of report for the client.

**+ +**

**Package coordination:** Co-ordinate any mechanical engineering installation design work, from design team, contractor's design contributors, specialist 3<sup>rd</sup> parties; obtain quotations and other information in connection with the mechanical installations. Negotiate with the public and other utility authorities for provision of all necessary incoming services.

**+**

**Package coordination:** Monitor coordination of any mechanical engineering installation design work.

**+ +**

**Specialist procurement:** Where mechanical installations are to be tendered separately obtain list of tenderers from the client or assist in the preparation of a tender list, invite tenders from approved contractors; appraise and report on tenders received. If necessary, contribute to negotiation of reductions in tenders, in consultation with the client, Lead Adviser, and/or Contract Lead e.g. NEC Project Manager or JCT Contract Administrator.

**+**

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Lot 1: Scope of Services

Scape Consultancy Framework – Built Environment 34

**Procurement:** Monitor Contractor's procurement of mechanical engineering packages, reviewing decisions on shortlisting, MEAT etc to ensure value for money optimised.

**+ +**

**Assists and support approval process:** Providing timely and accurate mechanical drawings/calculations etc for Building Regulations, responding to any queries / conditions.

+

**Assists and support approval process:** Providing timely assessments of Contractor's mechanical drawings/calculations etc for Building Regulations, responding to any queries / clarification requests.

++

**Validation:** Collaboratively re-examine proposals to determine their ability to meet client/stakeholders' objectives/requirements. +++

**Statutory consents:** Provide support to the team in securing any statutory consents to ensure the project is delivered in line with time requirements.

+++

**Operation and Maintenance (O&M) Strategy:** Development of O&M strategy, handover strategy, testing and commissioning. +++

**Scope Engage Portal:** Tender opportunity advertised on our bespoke Engage Portal Dynamic Purchasing System. +++

**Benefits review:** Review of progress against intended benefits considers time, tools and resource needed. +++

**Social Value update:** Provide client with update on Social Value data through use of our bespoke Social Value App. +++

**Value for money update:** Provide client with update on VfM data through use of our VfM tool. +++

**Engagement with end-user community:** Engage with end-user community to enable 'users' to be key influencers in design development.

+++

**Lessons learnt and client satisfaction:** Manage lessons learnt and client satisfaction process. ++

+

## **Manufacturing and Construction D&B**

1

**D&B**

2

**Trad**

**Management:** Oversee/report on mechanical engineering progress including monitoring compliance, costs to budget, variations/CEs programme reviews etc to support Lead Adviser, Lead Designer, Contract Lead and Client

+++

**Maintain effective communication channels between parties:** +++

**Design/approval:** assist contractor/supply-chain installation drawings production/sign-off +

**Design/approval:** approve/sign-off contractor/supply-chain installation drawings ++

**Commercial input:** support accurate commercial management of works with input to applications, compensation events/variations etc

+++

**Attendance:** Visit the works at appropriate intervals and inspect the progress and quality of the workmanship and materials for compliance with the contract documents and good building practice – fulfilling the role of NEC Supervisor or JCT Clerk of Works or supporting the fulfilment of this role when undertaken by others.

+++

**Coordination between parties:** attending meetings/dialogue and monitor timely provision of client/stakeholder information and approvals

+++

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## Lot 1: Scope of Services

### Scape Consultancy Framework – Built Environment 35

**Providing client/stakeholders with technical advice/reports:** Support the client, advising on suitability of Contractor/design team proposals, programmes etc with recommendations to resolve areas of concern.

+ + +

**Witnessing, testing & commissioning:** to demonstrate full functionality, balancing of systems, sign-off of records, suitable training of end-users etc

+ + +

**Reporting:** Monitor/track progress providing appropriate reporting and risk/opportunity management, using early warnings etc. Supporting client and instigating corrective actions

+ + +

**Records:** ensuring Client, end-users, Lead Designer, and Contract Lead have as-built records and data for Health and Safety File and the Building Log Book, including an operation and maintenance manual for the mechanical services

+ + +

**Government Soft Landings:** Finalise end user training, occupation and aftercare programme in line with Government Soft Landings strategy for successful handover.

+ + +

**End-user engagement:** End-user engagement to allow a smooth transition at handover. + + +

**Media engagement:** Media engagement to foster goodwill in the community and celebrate success.

+ + +

**Lessons learnt and client satisfaction:** Manage lessons learnt and client satisfaction process. + +

+

## Handover and Close Out & In Use D&B

1

### D&B

2

### Trad

**Handover control:** Provide maintenance details and operating manuals with record drawings in hard and electronic copy and submit to the Client, end-users, Lead Designer, and Contract Lead

+ + +

**Performance management:** At handover and after the completion of making good defects, submit a report on mechanical subcontractor's performance to the client

+ + +

**Commercial input:** Assist in the preparation of the final account. + + +

**Effective closure of project:** Oversight of storage of certificates, manuals, as-builts, CAFM updates etc + + +

**Verify project outcomes:** Verify project outcomes against client drivers to ensure positive community, environmental and economic outcomes.

+ + +

**Benchmark report:** Prepare benchmark report to provide future framework projects with valuable data. + + +

**Support enhanced aftercare tasks:** Engagement with FM team, client team and end users to ensure optimal asset performance and support enhanced building health check after 12 and 24 months.

+ + +

**Complete post project review:** Complete post project review, benefits realisation and customer listening process. + + +

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Lot 1: Scope of Services

Scape Consultancy Framework – Built Environment 36

## **Electrical Engineering**

**The Consultant will be responsible for all aspects of Electrical Engineering.**

**The Consultant's Electrical Engineering team may be appointed independently, as part of the Client's design team or as a Client Adviser to support Contractor-led/Design & Build solutions. The Lead Designer will co-ordinate and integrate**

**Electrical Engineering activities with the work of other design contributors however employed.**

**For projects where the services content forms the majority or all of the work relate to Electrical Engineering the Consultant's Electrical Engineering Team may be required to act as the Lead Designer and co-ordinate and integrate the work of other design contributors however employed.**

**As part of this role the Consultant should expect to deliver the following Electrical Engineering outcomes/actions.**

**Generally D&B**

**1**

**D&B**

**2**

**Trad**

**Attendance/engagement:** activities should include convening/arranging and attending/chairing meetings as necessary to

effectively deliver the client's requirements, for example: client/stakeholder engagement, Soft

Landing/Plan for Use, Design,

BIM/Digital Execution, Project, Site Logistics/constraints, and others. Associated activities include

taking/issuing comprehensive

notes of each meeting and maintaining meetings are well facilitated and productive.

+ + +

**Collaborative working:** support effective collaboration between parties at each stage focusing on discharging appropriate Plan

of Work Strategies to deliver project success through combined skills of project stakeholders including

design team, contractor(s),

specialists, supply-chain etc.

+ + +

**Contract Management:** where requested provide contract management (**Contract Lead**) duties otherwise supporting their

fulfilment by others, as appropriate to the main form of contract e.g. NEC ECC Supervisor, Project Manager or NEC PSC Service

Manager duties, JCT Contract Administrator, Clerk of Works etc. Includes coordinating with other contract roles.

+ + +

**BIM/Digital Execution:** Support the effective delivery of BIM Services on every Commission, and

BIM Level 2 where requested. + + +

**Design Management:** Lead and co-ordinate design or support coordination of Electrical Engineering with design work done by

the client's design team, contractor's design contributors, specialist 3<sup>rd</sup> party contractors, etc. Obtain

quotations and other

information in connection with specialist work.

+

**Design Management:** Lead and co-ordinate design or support coordination of Electrical Engineering with design work done by

the client's design team. Monitor ongoing development of Contractor's Electrical Engineering Design.

Obtaining quotations and other information in connection with specialist work prior to the Contractor's appointment.

+ +

**Statutory compliance:** with HSEQ requirements including the CDM Regulations insofar as they relate to this Service and liaise with the project team to advise the client of its statutory obligations.

+ + +

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Lot 1: Scope of Services

Scape Consultancy Framework – Built Environment 37

**Supervision:** Where requested to fulfil the NEC Supervisor or Clerk of Works duties, otherwise supporting their fulfilment of by others.

+ + +

**Compliance:** with HSEQ requirements including the CDM Regulations insofar as they relate to this Service and liaise with the project team to advise the client of its statutory obligations.

+ + +

**Plan of work:** Discharge appropriate Core Tasks and Core Statutory Processes from the RIBA 2020 Plan of Work to achieve appropriate Stage Outcomes in a timely and efficient manner.

+

**Plan of work:** Discharge appropriate Core Tasks and Core Statutory Processes from the RIBA 2020 Plan of Work to achieve appropriate Stage Outcomes in a timely and efficient manner unless Tasks and Processes allocated to Contractor/Contractor's design team.

+ +

**Providing client/stakeholders with technical advice/reports:** Providing technical advice and expertise at each stage of a project advising the client, stakeholders and design team on market intelligence, historic reference projects/benchmarks, forecast trends and suitability of design proposals, budgets etc. May need to work alongside Lead Adviser with some and/or all of the other design team members including contributors for contractor design portions/ECI. Will also brief/support client staff, examine reports/studies etc, monitor implementation and supervise progress to next stage.

+

**Providing client/stakeholders with technical advice/reports:** Providing technical advice and expertise at each stage of a project advising the client, stakeholders and design team on market intelligence, historic reference projects/benchmarks, forecast trends and suitability of design proposals, budgets etc. May need to work alongside Lead Adviser with some and/or all of the other client advisers and design disciplines provided by the Contractor. Will also brief/support client staff, examine reports/studies etc, monitor implementation and supervise progress to next stage.

+ +

**Common data environment:** Supporting the procurement and implementation of a common data environment platform. + + +

**Conduct initiation workshops:** Workshops to be carried out to include Value for Money, Social Value, Sustainability, Collaboration and Best Practice.

+ + +

**Sustainability and Carbon Reduction Plan:** Scope and plan sustainability and carbon strategy to ensure sustainability, environmental enhancement and carbon reduction are embedded into project delivery.

+ + +

**Strategic Definition & Preparation and Brief D&B**

1

**D&B**

2

**Trad**

**Effective means to develop appreciation of client and its project:** e.g. Discuss client's Requirements/Business Case, Strategic Brief and other core project requirements, including reporting cycles/client organisation structure/roles, timescale and any financial limits, whole-life targets, construction strategy; assess these and give general advice on how to proceed; maintaining effective lines of communication.

**+ + +**

**Due diligence:** Carry out site appraisal and obtain/investigate any reasonably accessible data and information relating to the project and relevant to the works. E.g. asbestos surveys/Health and Safety files, or ownership and any lessors and lessees of the site, any existing buildings and services on the site, boundary fence and other enclosures, any known easements, encroachments, underground services, rights of way, rights of support or other relevant matters

**+ + +**

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Lot 1: Scope of Services

Scape Consultancy Framework – Built Environment 38

**Collaborative review:** Undertake, with other appointed client advisers/design team members/Contractor Design Contributors etc, technical appraisals as may be necessary to determine the feasibility of the client's electrical engineering solution requirements such as BREEAM, Passivhaus, programmes, budgets etc

**+**

**Collaborative review:** Undertake, with other client advisers/design team members and (contractor/contractor's team where appointed) technical appraisals as may be necessary to determine the feasibility of the client's electrical engineering solution requirements such as BREEAM, Passivhaus, programmes, budgets etc

**+ +**

**Commercial input:** Work with other client advisers/design team members & contributors/contractor/specialists to provide an approximation of cost based upon unit volume, unit area or similar available statistics, cost for basic services, renewables e.g. wind turbine, CHP and, solar electricity (PV) to meet whole-life requirements

**+ + +**

**Discharge responsibilities as allocated:** Diligently discharge project roles, responsibilities complying with communication methodology, common standards, Digital Execution/Building Information Modelling (BIM) and technology standards and strategy, schedules of services and initial project brief; agreeing strategy/actions to efficiently meet/deliver project and quality objectives and success criteria (e.g. sustainability outcomes, programme, whole-life cost and quality).

**+ + +**

**Add Value:** identify the various actions at each stage including proposals for additional research, surveys, investigations and Risk and Value Management Modelling, etc. For example, agree Sustainability Strategy, Maintenance & Operational Strategy, Handover Strategy etc to meet the client's brief and stakeholders' objectives.

**+ + +**

**Value management/Optioneering:** Confer with the client and other parties including members of the design team, contractor

etc., on the options and alternative methods of meeting the client's requirements having regard to the means of procuring, types of contract, timing, funding, resources, site conditions etc

**+ + +**

**Communication:** use communication channels including reporting and authorisation procedures to operate with the client, maintaining effective communication between parties.

**+ + +**

**Government Soft Landings:** Develop Soft Landings Strategy – early engagement and preparation for successful handover and operation.

**+ + +**

**ISO44001 Collaboration Workshop:** In addition to the collaboration review we will build in an ISO44001 collaboration workshop to ensure the project adhered to accredited standards and status.

**+ + +**

**Social Value Workshop and Report:** Conduct a Social Value workshop and produce a report to capture social value features most relevant to the client and project.

**+ + +**

**Value for Money Workshop and Report:** Conduct a Value for Money workshop and produce a report to capture areas where VfM can be achieved at an early stage.

**+ + +**

**Best Practice Workshop:** Conduct a best practice workshop to identify innovations and best practice solutions to be adopted into project delivery.

**+ + +**

**Sustainability and Carbon Reduction Plan:** Review sustainability and carbon plan for the project to ensure sustainability, environmental enhancement and carbon reduction are embedded into the scheme.

**+ + +**

**Manage lessons learnt and client satisfaction process:** Identify lessons learnt and client satisfaction scores from previous projects at an early stage.

**+ + +**

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Lot 1: Scope of Services

Scape Consultancy Framework – Built Environment 39

## **Concept Design, Spatial Coordination and Technical Design D&B**

**1**

**D&B**

**2**

**Trad**

**Support establishment of the team/Procurement:** supporting lead adviser/client design team member in procurement of other design team members, specialists, contractor(s), including tender (MEAT) or direct award assessments providing drawings and documents as required. Supporting team with identification of long lead/pre-ordered electrical engineering items.

**+**

**Support establishment of the team/Procurement:** supporting lead adviser/client design team member in procurement of other design team members, specialists, contractor(s), including tender (MEAT) or direct award assessments providing drawings and documents as required. Supporting team with identification of long lead/pre-ordered items. Assisting any novations and/or

Contractor's procurement of electrical engineering design contributors Supporting team with identification of long lead/preordered items

**+ +**

**Teambuilding:** Assist onboarding of new project team members including the Contractor, working to establish reporting/communication channels between parties and cultural alignment

**+**

**Teambuilding:** Whenever Contractor appointed, work with the Contractor, supporting onboarding of all new project team members, ensuring all roles, responsibilities, reporting/communication channels between parties appropriately allocated and cultural alignment

**+ +**

**Clarify brief:** Agree the scope of the specifications/Scope/Works Information and co-ordination of drawings with stakeholders including the client's advisers/design team, with particular reference to electrical services and specialist work affecting the structure.

**+**

**Clarify brief:** Agree the scope of the specifications/Scope/Works Information and co-ordination of drawings with stakeholders including the Contractor/Contractor's design team, with particular reference to electrical services and specialist work affecting the structure.

**+ +**

**Due diligence:** Consult any local or any other authority necessary in connection with the electrical design of the works and prepare details and calculations as necessary to the appropriate Authorities

**+**

**Due diligence:** Consult any local or any other authority necessary in connection with the electrical design of the works and prepare details and calculations as necessary to the appropriate Authorities. Once appointed ensure the Contractor maintains ongoing due diligence requirements

**+ +**

**Communication & collaboration:** Maintain effective communication/information exchange/collaboration between parties such as design data for the engineering services showing locations and approximate sizes of plant rooms, major items of plant, ducts and service run; also approximate weights of any item affecting architectural concepts and structural design to ensure compatibility.

**+**

**Communication & collaboration:** Maintain effective communication/information exchange/collaboration between parties reviewing data/proposals for compatibility, ensuring parties benefit from specialist expertise, facilitating specialist workshops, peer reviews etc

**+ +**

**Concept Design:** With other stakeholders including end-users, design team members, Contractor Design Contributors (where appointed) etc support development of concept design and prepare calculations (such as heating, cooling, power loads etc), drawings and specification of the works within the cost plan limit.

**+**

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## Lot 1: Scope of Services

### Scape Consultancy Framework – Built Environment 40

**Concept Design:** Where Contractor appointed, work with Contractor and other stakeholders to support development of concept design from the outline proposals taking into account amendments requested by the client and review Contractor's calculations (such as heating, cooling power loads).  
Where no Contractor appointed, as client led/Traditional activities.

+ +

**Commercial input:** In conjunction with client advisers/design team members & contributors/contractor/specialists providing advise on the cost for the electrical design solution for the project.

+ + +

**Technical advice/design reviews:** Continually validating designs/programme such as evaluations of energy/power use and consumption calculations, advising the client's design team on energy conservation measure and ensuring design elements properly co-ordinated and integrated.

+

**Technical advice/design reviews:** Continually validating designs/programme such as evaluations of energy/power use and consumption calculations, advising the client on the suitability of proposed energy conservation measures and ensuring design elements properly co-ordinated and integrated

+ +

**Reporting:** Prepare progress reports and final report to client, including fully developed brief, explanation of scheme, outline specification/Scope/Works Information, estimate of cost of the building works and project plan and risks; highlighting project's compliance with client/stakeholder targets/objectives, obtaining approvals as appropriate and supporting client making informed decisions/approval to proceed.

+

**Reporting:** Prepare progress reports and final report to client, ensuring Contractor includes fully developed brief, explanation of scheme, outline specification/Scope/Works Information, estimate of cost of the building works and project plan and risks. Support client by confirming project's compliance with client/stakeholder targets/objectives, obtaining approvals as appropriate and supporting client making informed decisions/approval to proceed.

+ +

**Spatial Coordination/Technical Design:** With other client advisers/design team members including contractor's design contributors where appointed, develop spatial coordination proposals, design and technical information to enable tenders to be invited including drawings, schedules and specification of materials and standard of workmanship. Submit final designs for each of the engineering services to be included in the works with the associated estimates and assist in preparation of report for the client.

+

**Spatial Coordination:** With other client advisers/design team members and Contractor (where appointed), develop spatial coordination concept design and information to enable tenders to be invited including drawings, schedules and specification of materials and standard of workmanship as appropriate to required appointment stage. If already appointed, oversee Contractor's development of spatial coordination proposals into technical design/production

information. Assessing final designs for each of the engineering services to be included in the works with the associated estimates and assist in preparation of report for the client.

**+ +**

**Package coordination:** Co-ordinate any electrical engineering installation design work, from design team, contractor's Design contributors, specialist 3<sup>rd</sup> parties; obtain quotations and other information in connection with the electrical installations. Negotiate with the public and other utility authorities for provision of all necessary incoming services.

**+**

**Package coordination:** Monitor coordination of any electrical engineering installation design work. **+**

**+**

**Specialist procurement:** Where electrical installations are to be tendered separately obtain list of tenderers from the client or assist in the preparation of a tender list, invite tenders from approved contractors; appraise and report on tenders received. If

**+ + +**

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Lot 1: Scope of Services

Scape Consultancy Framework – Built Environment 41

necessary contribute to negotiation of reductions in tenders, in consultation with the client, Lead Adviser, and/or Contract Lead

e.g. NEC Project Manager or JCT Contract Administrator.

**Procurement:** Monitor Contractor's procurement of electrical engineering packages, reviewing decisions on shortlisting, MEAT etc to ensure value for money optimised.

**+ +**

**Assists and support approval process:** Providing timely and accurate drawings/calculations etc for Building Regulations, responding to any queries / conditions.

**+**

**Assists and support approval process:** Providing timely assessments of Contractor's drawings/calculations etc for Building Regulations, responding to any queries / clarification requests.

**+ +**

**Validation:** Collaboratively re-examine proposals to determine their ability to meet client/stakeholders' objectives/requirements. **+ + +**

**Statutory consents:** Provide support to the team in securing any statutory consents to ensure the project is delivered in line with time requirements.

**+ + +**

**Operation and Maintenance (O&M) Strategy:** Development of O&M strategy, handover strategy, testing and commissioning. **+ + +**

**Scape Engage Portal:** Tender opportunity advertised on our bespoke Engage Portal Dynamic Purchasing System. **+ + +**

**Benefits review:** Review of progress against intended benefits considers time, tools and resource needed. **+ + +**

**Social Value update:** Provide client with update on Social Value data through use of our bespoke Social Value App. **+ + +**

**Value for money update:** Provide client with update on VfM data through use of our VfM tool. **+ + +**

**Engagement with end-user community:** Engage with end-user community to enable users to be key influencers in design development.

**+ + +**

**Lessons learnt and client satisfaction:** Manage lessons learnt and client satisfaction process. + +

+

## **Manufacturing and Construction D&B**

1

### **D&B**

2

### **Trad**

**Management:** Oversee/report on electrical engineering progress including monitoring compliance, costs to budget, variations/CEs, programme reviews etc to support the Client, end-users, Lead Designer, and Contract Lead

+ + +

**Maintain effective communication channels between parties:** + + +

**Design/approval:** assist contractor/supply-chain installation drawings production/sign-off +

**Design/approval:** approve/sign-off contractor/supply-chain installation drawings + +

**Commercial input:** support accurate commercial management of works with input to applications, compensation events/variations etc

+ + +

**Attendance:** Visit the works at appropriate intervals and inspect the progress and quality of the workmanship and materials for compliance with the contract documents and good building practice – fulfilling the role of NEC Supervisor or JCT Clerk of Works or supporting the fulfilment of this role when undertaken by others.

+ + +

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Lot 1: Scope of Services

Scape Consultancy Framework – Built Environment 42

**Coordination between parties:** attending meetings/dialogue and monitor timely provision of client/stakeholder information and approvals

+ + +

**Providing client/stakeholders with technical advice/reports:** Support the client, advising on suitability of Contractor/design team proposals, programmes etc with recommendations to resolve areas of concern.

+ + +

**Witnessing, testing & commissioning:** to demonstrate full functionality, balancing of systems, sign-off of records, suitable training of end-users etc

+ + +

**Reporting:** Monitor/track progress providing appropriate reporting and risk/opportunity management, using early warnings etc.

Supporting client and instigating corrective actions

+ + +

**Records:** ensuring client, NEC Project Manager or Contract Administrator have as-built records and data for Health and Safety File and the Building Log Book, including an operation and maintenance manual for the electrical services

+ + +

**Government Soft Landings:** Finalise end user training, occupation and aftercare programme in line with Government Soft Landings strategy for successful handover.

+ + +

**End-user engagement:** End-user engagement to allow a smooth transition at handover. + + +

**Media engagement:** Media engagement to foster goodwill in the community and celebrate success.

+ + +

**Lessons learnt and client satisfaction:** Manage lessons learnt and client satisfaction process. + +

+

**Handover and Close Out & In Use D&B**

1

**D&B**

2

**Trad**

**Handover control:** Provide maintenance details and operating manuals with record drawings in hard and electronic copy and submit to the Client, end-users, Lead Designer, and Contract Lead

+ + +

**Performance management:** At handover and after the completion of making good defects, submit a report on contractor/electrical sub-contractor's performance to the client

+ + +

**Commercial input:** Assist in the preparation of the final account. + + +

**Effective closure of project:** Oversight of storage of certificates, manuals, as-builts, CAFM updates etc + + +

**Verify project outcomes:** Verify project outcomes against client drivers to ensure positive community, environmental and economic outcomes.

+ + +

**Benchmark report:** Prepare benchmark report to provide future framework projects with valuable data. + + +

**Support enhanced aftercare tasks:** Engagement with FM team, client team and end users to ensure optimal asset performance and support enhanced building health check after 12 and 24 months.

+ + +

**Complete post project review:** Complete post project review, benefits realisation and customer listening process. + + +

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Lot 1: Scope of Services

Scape Consultancy Framework – Built Environment 43

## **Structural Engineering**

**The Consultant will be responsible for all aspects of Structural Engineering.**

**The Consultant's Structural Engineering team may be appointed independently, as part of the Client's design team or as a Client Adviser to support**

**Contractor-led/Design & Build solutions. The Lead Designer will co-ordinate and integrate Structural Engineering activities with the work of other design contributors however employed.**

**For projects where the services content forms the majority or all of the work relate to Structural Engineering the Consultant's Structural**

**Engineering Team may be required to act as the Lead Designer and co-ordinate and integrate the work of other design contributors however employed.**

**As part of this role the Consultant should expect to deliver the following Structural Engineering outcomes/actions.**

**Generally D&B**

1

**D&B**

2

**Trad**

**Attendance/engagement:** activities should include convening/arranging and attending/chairing meetings as necessary to effectively deliver the client's requirements, for example: client/stakeholder engagement, Soft Landing/Plan for Use, Design,

Digital Execution/BIM, Project, Site Logistics/constraints, and others. Associated activities include taking/issuing comprehensive notes of each meeting and maintaining meetings are well facilitated and productive.

**+++**

**Collaborative working:** support effective collaboration between parties at each stage focusing on discharging appropriate Plan of Work Strategies to deliver project success through combined skills of project stakeholders including design team, contractor(s), specialists, supply-chain etc.

**+++**

**Contract Management:** where requested provide contract management (**Contract Lead**) duties, otherwise supporting their fulfilment by others, as appropriate to the main form of contract e.g. NEC ECC Supervisor, Project Manager or NEC PSC Service Manager duties, JCT Contract Administrator, Clerk of Works etc. Includes coordinating with other contract roles.

**+++**

**BIM/Digital Execution:** Support the effective delivery of BIM Services on every Commission, and BIM Level 2 where requested. **+++**

**Design Management:** Lead and co-ordinate design or support coordination of Structural Engineering with design work done by the client's design team, contractor's design contributors, specialist 3<sup>rd</sup> party contractors, etc. Obtain quotations and other information in connection with specialist work.

**+**

**Design Management:** Lead and co-ordinate design or support coordination of Structural Engineering with design work done by the client's design team. Monitor ongoing development of Contractor's Structural Engineering Design. Obtaining quotations and other information in connection with specialist work prior to the Contractor's appointment.

**++**

**Statutory compliance:** with HSEQ requirements including the CDM Regulations insofar as they relate to this Service and liaise **+++**

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Lot 1: Scope of Services

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with the project team to advise the client of its statutory obligations.

**Supervision:** Where requested, fulfil the NEC Supervisor or Clerk of Works duties, otherwise supporting their fulfilment of by others.

**+++**

**Plan of work:** Discharge appropriate Core Tasks and Core Statutory Processes from the RIBA 2020 Plan of Work to achieve appropriate Stage Outcomes in a timely and efficient manner.

**+**

**Plan of work:** Discharge appropriate Core Tasks and Core Statutory Processes from the RIBA 2020 Plan of Work to achieve appropriate Stage Outcomes in a timely and efficient manner unless Tasks and Processes allocated to Contractor/Contractor's design team.

**++**

**Providing client/stakeholders with technical advice/reports:** Providing technical advice and expertise at each stage of a project advising the client, stakeholders and design team on market intelligence, historic reference projects/benchmarks, forecast trends and suitability of design proposals, budgets etc. May need to work alongside Lead Adviser with some and/or all of the other design team

members including contributors for contractor design portions/ECI. Will also brief/support client staff, examine reports/studies etc, monitor implementation and supervise progress to next stage.

+

**Providing client/stakeholders with technical advice/reports:** Providing technical advice and expertise at each stage of a project advising the client, stakeholders and design team on market intelligence, historic reference projects/benchmarks, forecast trends and suitability of design proposals, budgets etc. May need to work alongside Lead Adviser with some and/or all of the other client advisers and design disciplines provided by the Contractor. Will also brief/support client staff, examine reports/studies etc, monitor implementation and supervise progress to next stage.

++

**Common data environment:** Supporting the procurement and implementation of a common data environment platform. ++

**Conduct initiation workshops:** Workshops to be carried out to include Value for Money, Social Value, Sustainability, Collaboration and Best Practice.

+++

**Sustainability and Carbon Reduction Plan:** Scope and plan sustainability and carbon strategy to ensure sustainability, environmental enhancement and carbon reduction are embedded into project delivery.

+++

**Strategic Definition & Preparation and Brief D&B**

1

**D&B**

2

**Trad**

**Effective means to develop appreciation of client and its project:** e.g. Discuss/map client's Requirements/Business Case, Strategic Brief and other core project requirements, including reporting cycles/client organisation structure/roles, timescale and any financial limits, whole-life targets, construction strategy; assess these and give general advice on how to proceed; maintain effective lines of communication.

+++

**Due diligence:** Carry out site appraisal and obtain/investigate any reasonably accessible data and information relating to the project and relevant to the works. E.g. Advise on need to carry out any geotechnical investigations, topographical surveys special surveys, investigations or model tests to be carried out under the consulting engineer's direction. Prepare a specification/Scope for such surveys and investigations and evaluate and interpret the results

+++

**Collaborative review:** Undertake, with other appointed client advisers/design team

members/Contractor Design Contributors +

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etc, technical appraisals as may be necessary to determine the feasibility of the client's structural solution requirements, programme, budget etc

**Collaborative review:** Undertake, with other client advisers/design team members and (contractor/contractor's design team where appointed) technical appraisals as may be necessary to determine the feasibility of the client's structural solution

requirements, programme, budget etc

**+ +**

**Commercial input:** Work with other client advisers/design team members & contributors/contractor/specialists to provide an approximation of cost based upon unit volume, unit area or similar available statistics

**+ + +**

**Discharge responsibilities as allocated:** Diligently discharge project roles, responsibilities complying with communication methodology, common standards, Digital Execution/Building Information Modelling (BIM) and technology standards and strategy, schedules of services and initial project brief; agreeing strategy/actions to efficiently meet/deliver project and quality objectives and success criteria (e.g. sustainability outcomes, programme, whole-life cost and quality).

**+ + +**

**Add Value:** identify the various actions at each stage including proposals for additional research, surveys, investigations and Risk and Value Management Modelling, etc. For example, agree Sustainability Strategy, Maintenance & Operational Strategy, Handover Strategy etc to meet the client's brief and stakeholders' objectives.

**+ + +**

**Value management/Optioneering:** Confer with the client and other parties including members of the design team, contractor etc., on the options and alternative methods of meeting the client's requirements having regard to the means of procuring, types of contract, timing, funding, resources, site conditions etc

**+ + +**

**Communication:** use communication channels including reporting and authorisation procedures to operate with the client, maintaining effective communication between parties.

**+ + +**

**Government Soft Landings:** Develop Soft Landings Strategy – early engagement and preparation for successful handover and operation.

**+ + +**

**ISO44001 Collaboration Workshop:** In addition to the collaboration review we will build in an ISO44001 collaboration workshop to ensure the project adhered to accredited standards and status.

**+ + +**

**Social Value Workshop and Report:** Conduct a Social Value workshop and produce a report to capture social value features most relevant to the client and project.

**+ + +**

**Value for Money Workshop and Report:** Conduct a Value for Money workshop and produce a report to capture areas where VfM can be achieved at an early stage.

**+ + +**

**Best Practice Workshop:** Conduct a best practice workshop to identify innovations and best practice solutions to be adopted into project delivery.

**+ + +**

**Sustainability and Carbon Reduction Plan:** Review sustainability and carbon plan for the project to ensure sustainability, environmental enhancement and carbon reduction are embedded into the scheme.

**+ + +**

**Manage lessons learnt and client satisfaction process:** Identify lessons learnt and client satisfaction scores from previous projects at an early stage.

+ + +

## **Concept Design, Spatial Coordination and Technical Design D&B**

1

### **D&B**

2

### **Trad**

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**Support establishment of the team/Procurement:** supporting lead adviser/client design team member in procurement of other design team members, specialists, contractor(s), including tender (MEAT) or direct award assessments providing drawings and documents as required. Supporting team with identification of long lead/pre-ordered structural elements.

+

**Support establishment of the team/Procurement:** supporting lead adviser/client design team member in procurement of other design team members, specialists, contractor(s), including tender (MEAT) or direct award assessments providing drawings and documents as required. Supporting team with identification of long lead/pre-ordered items. Assisting any novations and/or Contractor's procurement of structural engineering design contributors.

+ +

**Teambuilding:** Assist onboarding of new project team members including the Contractor, working to establish reporting/communication channels between parties and cultural alignment

+

**Teambuilding:** Whenever Contractor appointed, work with the Contractor, supporting onboarding of all new project team members, ensuring all roles, responsibilities, reporting/communication channels between parties appropriately allocated and cultural alignment

+ +

**Clarify brief:** Agree the scope of the specifications/Scope/Works Information and co-ordination of drawings with stakeholders including the client's advisers/design team, with particular reference to structural elements and specialist work affecting the structure.

+

**Clarify brief:** Agree the scope of the specifications/Scope/Works Information and co-ordination of drawings with stakeholders including the Contractor/Contractor's design team, with particular reference to structural elements and specialist work affecting the structure

+ +

**Due diligence:** Consult any local or any other authority necessary in connection with the structural design of the works and prepare details and calculations as necessary to the appropriate Authorities

+

**Due diligence:** Consult any local or any other authority necessary in connection with the structural design of the works and prepare details and calculations as necessary to the appropriate Authorities. Once appointed ensure Contractor maintains ongoing due diligence requirements

+ +

**Communication & collaboration:** Maintain effective communication/information exchange/collaboration between parties such as loading data for the engineering services showing locations and approximate sizes of plant rooms, major items of plant, and service run; also approximate weights of any item affecting architectural concepts and structural design to ensure compatibility.

+

**Communication & collaboration:** Maintain effective communication/information exchange/collaboration between parties reviewing data/proposals for compatibility, ensuring parties benefit from specialist expertise, facilitating specialist workshops, peer reviews etc

++

**Concept Design:** With other stakeholders including end-users, design team members, Contractor Design Contributors (where appointed) etc support development of concept design and prepare calculations, drawings, and specification of the works within the cost plan limit.

+

**Concept Design:** Where Contractor appointed, work with Contractor and other stakeholders to support development of concept design from the outline proposals taking into account amendments requested by the client and review Contractor's calculations, drawings and specification of the works within the cost plan limit. Where no Contractor appointed, as client led/Traditional activities.

++

**Commercial input:** In conjunction with the client advisers/design team members & contributors/contractor/specialists providing ++

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advice on the cost for the structural design solution for the project.

**Coordination:** Co-ordinate any structural design work, with designs carried out by other consultants, specialist contractors, subcontractors, and suppliers; obtain quotations and other information in connection with the structural installations.

+++

**Technical advice/design reviews:** Continually validating designs/programme, advising the client/client advisers on suitability, and ensuring design elements properly co-ordinated and integrated.

+

**Technical advice/design reviews:** Continually validating designs/programme, advising the client on the suitability of proposed solutions, and ensuring design elements properly co-ordinated and integrated.

++

**Reporting:** Prepare progress reports and final report to client, including fully developed brief, explanation of scheme, outline specification/Scope/Works Information, estimate of cost of the building works and project plan and risks; highlighting project's compliance with client/stakeholder targets/objectives, obtaining approvals as appropriate and supporting client making informed decisions/approval to proceed.

+

**Reporting:** Prepare progress reports and final report to client, ensuring Contractor includes fully developed brief, explanation of scheme, outline specification/Scope/Works Information, estimate of cost of the building works and project plan and risks. Support

client by confirming project's compliance with client/stakeholder targets/objectives, obtaining approvals as appropriate and supporting client making informed decisions/approval to proceed.

**+ +**

**Spatial Coordination/Technical Design:** With other client advisers/design team members including contractor's design contributors where appointed, develop spatial coordination proposals, design and technical information to enable tenders to be invited including drawings, schedules and specification of materials and standard of workmanship. Submit final design/specification/Scope/Works Information to be included in the works with the associated estimates and assist in preparation of report for the client.

**+**

**Spatial Coordination:** With other client advisers/design team members and Contractor (where appointed), develop spatial coordination concept design and information to enable tenders to be invited including drawings, schedules and specification of materials and standard of workmanship as appropriate to required appointment stage. If already appointed, oversee Contractor's development of spatial coordination proposals into technical design/production information. Assessing final designs for each of the structural component including services runs etc to be included in the works with the associated estimates and assist in preparation of report for the client.

**+ +**

**Package coordination:** Co-ordinate any structural installation design work, from design team, contractor's Design contributors, specialist 3<sup>rd</sup> parties; obtain quotations and other information in connection with the structural works.

**+**

**Package coordination:** Monitor coordination of any structural design work. **+ + +**

**Specialist procurement:** Where structural works/installations are to be tendered separately obtain list of tenderers from the client or assist in the preparation of a tender list, invite tenders from approved contractors; appraise and report on tenders received. If necessary, contribute to negotiation of reductions in tenders, in consultation with the Client, end-users, Lead Designer, and Contract Lead.

**+ + +**

**Procurement:** Monitor Contractor's procurement of structural works packages, reviewing decisions on shortlisting, MEAT etc to ensure value for money optimised.

**+ +**

**Assists and support approval process:** Providing timely and accurate structural drawings/calculations etc for Building Regulations, responding to any queries / conditions.

**+**

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Examine, check and comment on shop fabrication drawings, connection calculations and details, standard details, reinforcement drawings, bar bending schedules, specifications, and any other specialists details and calculations as required, etc. in respect of the conformity with the Structural Engineering design and in particular in respect of general dimensions, structural adequacy of members and connections and compliance with performance criteria.

**Assists and support approval process:** Providing timely assessments of Contractor's structural drawings/calculations etc for

Building Regulations, responding to any queries / clarification requests.  
Examine, check and comment on shop fabrication drawings, connection calculations and details, standard details, reinforcement drawings, bar bending schedules, specifications, and any other specialists details and calculations as required, etc. in respect of the conformity with the Structural Engineering design and in particular in respect of general dimensions, structural adequacy of members and connections and compliance with performance criteria

**++**

**Validation:** Collaboratively re-examine proposals to determine their ability to meet client/stakeholders' objectives/requirements. **+++**

**Statutory consents:** Provide support to the team in securing any statutory consents (including the planning application where required) to ensure the project is delivered in line with time requirements.

**+++**

**Operation and Maintenance (O&M) Strategy:** Development of O&M strategy, handover strategy, testing and commissioning. **+++**

**Scape Engage Portal:** Tender opportunity advertised on our bespoke Engage Portal Dynamic Purchasing System. **+++**

**Benefits review:** Review of progress against intended benefits considers time, tools and resource needed. **+++**

**Social Value update:** Provide client with update on Social Value data through use of our bespoke Social Value App. **+++**

**Value for money update:** Provide client with update on VfM data through use of our VfM tool. **+++**

**Engagement with end-user community:** Engage with end-user community to enable users to be key influencers in design development.

**+++**

**Lessons learnt and client satisfaction:** Manage lessons learnt and client satisfaction process. **++**

**+**

## **Manufacturing and Construction D&B**

**1**

### **D&B**

**2**

### **Trad**

**Management:** Oversee/report on progress including monitoring compliance, costs to budget, variations/CEs, programme reviews etc to support the Client, end-users, Lead Adviser, and Contract Lead, including approvals such as advise on required samples and testing procedures of structural elements; inspect and comment on sample and test results

**+++**

**Maintain effective communication channels between parties:** **+++**

**Design/approval:** assist contractor/supply-chain installation drawings production/sign-off **+**

**Design/approval:** approve/sign-off contractor/supply-chain installation drawings **++**

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**Commercial input:** support accurate commercial management of works with input to applications, compensation events/variations etc

**+++**

**Attendance:** Visit the works at appropriate intervals and inspect the progress and quality of the workmanship and materials for compliance with the contract documents and good building practice – fulfilling the role of NEC Supervisor or JCT Clerk of Works

or supporting the fulfilment of this role when undertaken by others.

**+** **+** **+**

**Coordination between parties:** attending meetings/dialogue and monitor timely provision of client/stakeholder information and approvals

**+** **+** **+**

**Providing client/stakeholders with technical advice/reports:** Support the client, advising on suitability of Contractor/design team proposals, programmes etc with recommendations to resolve areas of concern.

**+** **+** **+**

**Witnessing, testing & commissioning:** to demonstrate full functionality, balancing of systems, sign-off of records, suitable training of end-users etc

**+** **+** **+**

**Reporting:** Monitor/track progress providing appropriate reporting and risk/opportunity management, using early warnings etc. Supporting client and instigating corrective actions

**+** **+** **+**

**Records:** ensuring Client, end-users, Lead Designer, and Contract Lead have as-built records and data for Health and Safety File and the Building Log Book, including an operation and maintenance manual

**+** **+** **+**

**Government Soft Landings:** Finalise end user training, occupation and aftercare programme in line with Government Soft Landings strategy for successful handover.

**+** **+** **+**

**End-user engagement:** End-user engagement to allow a smooth transition at handover. **+** **+** **+**

**Media engagement:** Media engagement to foster goodwill in the community and celebrate success.

**+** **+** **+**

**Lessons learnt and client satisfaction:** Manage lessons learnt and client satisfaction process. **+** **+**

**+**

**Handover and Use D&B**

**1**

**D&B**

**2**

**Trad**

**Handover control:** Provide maintenance details and operating manuals with record drawings in hard and electronic copy and submit to the contract administrator

**+** **+** **+**

**Performance management:** At handover and after the completion of making good defects, submit a report on contractor/subcontractor's performance to the client

**+** **+** **+**

**Commercial input:** Assist in the preparation of the final account. **+** **+** **+**

**Effective closure of project:** Oversight of storage of certificates, manuals, as-builts, CAFM updates etc **+** **+** **+**

**Verify project outcomes:** Verify project outcomes against client drivers to ensure positive community, environmental and economic outcomes.

**+** **+** **+**

**Benchmark report:** Prepare benchmark report to provide future framework projects with valuable data. **+** **+** **+**

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**Support enhanced aftercare tasks:** Engagement with FM team, client team and end users to ensure optimal asset performance and support enhanced building health check after 12 and 24 months.

+++

**Complete post project review:** Complete post project review, benefits realisation and customer listening process. +++

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Lot 1: Scope of Services

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## Commercial Surveyor

**A Commercial Surveyor may be appointed as a Client Adviser independently or as part of a wider team.**

**The consultancy services may include valuation of commercial and residential land and buildings, advice on marketing strategy of surplus assets and subsequent disposal, identification of suitable land and buildings for acquisition, undertaking of landlord and tenant matters including rent review and lease renewal, advice and negotiation and settlement of compulsory purchase and compensation claims.**

**As part of this role the Commercial Surveyor should expect to deliver the following outcomes/actions.**

### Generally

To provide general practice surveying services for land and property on behalf of Clients.

**Project execution plan:** Input into Project Execution Plan to provide a road map for delivery.

**Project initiation workshops:** Workshops to be carried out to include Value for Money, Social Value, Sustainability, Collaboration and Best Practice.

**Value for Money:** Input into VfM workshop/reporting outputs.

**Social value:** Input into social value workshop/reporting outputs.

**Sustainability and Carbon Reduction Plan:** Input into sustainability and carbon delivery plans to ensure sustainability, environmental enhancement and carbon reduction are embedded into the project.

**Client satisfaction surveys:** Input into client satisfaction surveys and lessons learnt process to drive continuous improvement.

**Post-project process:** Input into post-project feedback process and enhanced aftercare where required.

### Disposal (sales) of Surplus Freehold and Leasehold Land and Property

Provision of a marketing strategy to the Client for the disposal of surplus land and property including the sale or surrender of interests in land and property; such services to include (but not be limited to):-

- undertaking research into market sectors likely to have an interest in such disposal;
- advice to the Client on the most suitable publications for such disposal;
- guide prices for such disposal;
- the likely timescale for such disposal;
- advice on the best method of disposal, auction, tender, private treaty, etc.

Research of likely advertising costs, including (but not exclusively) boards, photos, printing, distribution and liaison with publications, etc.

Following agreement of advertising budgets with the Client, arrangement of advertising, including design, layouts, boards, photographs etc.

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Marketing of properties to be disposed of including arrangements of visits by third parties in liaison with the Client, conducting site visits and

discussions/negotiations with third parties, third party agents and other relevant parties on site, administration of tender documentation including its

preparation and delivery to tenderers and the arrangement of the receipt of tenders

Evaluation of tender bids and offers and advice to the Client as to the most suitable tenders and offers.

On written request by the Client, proceed with the disposal including any liaison necessary with relevant parties.

In relation to the disposal of leasehold interest, the same services above.

Negotiation with relevant parties regarding the assignment, sub-letting or surrender of the interest of any property by Client as above.

**Communication:** Utilise significant communication network including the use of Propex, EGI, etc. to develop strong relationships with buyers and developers to identify best deal for the client.

**Agents Insight:** Use Agents Insight software to manage and promote disposal.

**Property agents:** Use an internationally recognised property agent for all disposals over £5m to provide the client with a speedy disposal process.

**Property auctions:** Use modern methods of auction for property auctions with a predicted value of under £1m to achieve a higher price compared to traditional methods.

### **Acquisition (purchases) of Freehold and Leasehold Land and Property**

Provision of site searches to requirements identified by the Client in a given geographical area, including provision of:

- written reports;
  - dealing with vendors, developers and their agents;
  - shortlisting and evaluating options;
  - undertaking costing exercises to estimate full life cost of capital (acquisition and refurbishment) and ownership (running costs) including the time value of money;
  - provision of advice on the best locations of sites within the Client area, local and national property prices including rental and leasehold prices; availability of financial or other packages on property available in the marketplace.
  - identification of suitable land and buildings for acquisition either by agreement or through compulsory powers
- Research for suitable land and property for the Client on instruction, including:
- examination of appropriate property publications;
  - liaison with property vendors;
  - visits to site;
  - advice to the Client on prices

Liaison with local planning authorities to ensure appropriateness of a site for use by the Client.

Carrying out site investigations for appraisal purposes including visits to sites, research into any obstacles to purchase, liaison with vendors, instruction of solicitors for land searches on behalf of the Client.

To assist in the formulation of land appraisals and planning development projects to achieve maximum potential value prior to disposal of surplus land and property assets.

Negotiation of terms with appropriate parties for freehold and/or leasehold acquisition of sites by the Client.

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### **Lot 1: Scope of Services**

#### **Scape Consultancy Framework – Built Environment 53**

Negotiation of terms with appropriate parties in respect of licenses, easements and rights over property on behalf of the Client.

Liaison with building surveyors, architects and other such consultants in respect of work needed on land and property to meet the Client's requirements prior to or subsequent to acquisition.

Attendance by appropriate and suitably qualified officers as expert witnesses at public enquiries or any other enquiry where property is acquired or where planning permission is needed, as required by the Client.

Negotiations with third parties in respect of claims for compensation by or against the Client.

Negotiate and settle Compulsory Purchase claims

Attendance by appropriate and suitably qualified staff at Lands Tribunals as expert witnesses on behalf of the Client.

**Funding:** Provide advice on funding opportunities and leverage local and national funding streams for property investment.

**Revenue:** Provide advice on revenue options and guidance for authorities on revenue generation options.

**Compulsory purchase order:** CPO service offering to ensure project is delivered in line with time, cost and quality requirements.

**CoStar:** Provide access to comparable data through CoStar software to highlight market intel in relation to deals and lease availability.

**Agents Insight:** Use of Agents Insight software to manage and promote acquisition to provide better value for money.

**Modern method of auction:** Use of modern method of auction – no fee charge to client, buyer pays for fees.

### **Capital valuations**

Carrying out Market Value and Existing Use Valuations of the Clients estate as requested in any year for accounting and other purposes as requested by the

Client in accordance with the RICS valuation practice and guidance notes and the CIPFA guide 'Valuations for Accounting Purposes'.

The provision of annual updates to current existing use valuations in the form of a desk top appraisal of the original valuation figure, i.e. full valuations

involving site visits, etc. are not required in respect of re-evaluations

Provision of individual market or existing use valuations of nominated properties as requested by the Client.

**IFRS16 accounting:** Advice on IFRS16 accounting standard to provide clients with value for money solutions.

**BCIS:** Develop BCIS to provide an auditable cost input to allow the client to start the valuation process earlier.

**Excel model:** Develop a robust and detailed auditable Excel model to provide the client with time savings on the project.

**Audit process:** Build strong relations with external auditors to facilitate year-end audit process to provide the client with no audit adjustments.

### **Rating valuation services**

Provide a comprehensive rating service to minimise rates costs in respect of all non-domestic properties.

Establishing the current statues of non-domestic rates at properties including relevant rating Client, ratable value, rates payable, appeals/tribunal status and savings made as a result of any appeals.

Advising the Client on the likely outcome and advisability of lodging appeals.

Lodging of appeals as necessary against the Valuation Officer's list.

All necessary surveys required to each property to enable negotiations to be conducted.

Detailed consideration of the assessments and negotiation with the Inland Revenue or relevant authority in an attempt to agree a satisfactory and fair ratable value.

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Reporting to the Client with recommendations and details of financial implication of accepting or challenging rating decisions.

Preparation for and attendance at Rating Tribunals on behalf of the Client.

Provision of general advice on rating matters.

**Rate liabilities:** Exposure to rate liabilities – opportunity to mitigate rates is explored.

**Landlord and developments:** Advice on landlord and developments to ensure the project is delivered in line with quality requirements.

**Valuation Office Agency:** Collaboration with Valuation Office Agency to ensure best practice is adopted.

**Planning:** Provide advice in line with planning requirements to ensure the project is delivered to time requirements.

### **Landlord and Tenant – Lease renewals and rent reviews**

Negotiating lease and license renewals on behalf of the Client with freeholder or freeholders' agents.

Negotiating rent reviews on behalf of the Client with landlords or landlords' agents.

Negotiating lease or license renewals on behalf of the Client with leaseholders or leaseholders' agents.

Negotiating rent reviews on behalf of the Client with tenants or tenants' agents.

Provision of advice and the assessment of the implications of clauses within leases or licenses and the wording of any agreements.

Advising the Client on the serving of appropriate Notices and arranging for such service of Notices where requested by the Client.

Resolution of any disputes relating to landlord and tenant matters including rent reviews and lease renewals by referral to third parties if necessary including any referrals and submissions to an independent expert, arbitrator or court as may be required.

**Storepoint Geo:** The use of Storepoint Geo to analyse catchment size, competition, travel data and demographics.

**Data management:** Create a bespoke data management system through Agents Insight to provide a central data management hub storing all property and tenancy information.

**Comparable data:** Provide access to comparable data to highlight market intel and ensure the project is delivered to cost requirements.

### **Other services**

#### **Dilapidations Services**

- On behalf of the Client negotiating claims for dilapidations against leaseholders and all relevant parties on the surrender of leases.
- The provision of schedules of condition, including written reports and photographs.

#### **Tribunals**

- The Contractor will be required to provide general advice on an arrangement of referrals to Tribunals, Courts or Arbitration on behalf of the Client.

#### **Property Review**

- The Contract will be required to produce and present a report with strategic analysis of the estate portfolio to the Client as and when required.

#### **Local Planning Issues**

- Provision to the Client of strategic advice on the implications of the local, town, district and countywide plans including liaison with planning authorities in

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#### **Lot 1: Scope of Services**

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respect of specific issues.

- Reviewing and updating the Client's information on the status of individual local plans and provision of updated reports summarising the relevant issues for the Client on local strategy, housing, transport, employment, environment, recreation, town centre and shopping, including implications for the local Client properties and timescales for implementation.

#### **Strategic and General Advice**

The Consultant is required to provide to the Client general strategic and general property advice by suitably qualified personnel in appropriate disciplines, as and when required, including preparing and presenting reports to Client officers and members.

#### **Client Services**

- To ensure that all commissions in respect of new work from the Client are the subject of an individual identification reference.
- To attend regular review meetings with the Client. Information to be presented at such meetings shall include:-
  - a spreadsheet summarising current workload by project number
  - provision of a diary system to identify in advance forthcoming strategic events such as rent reviews, renewals and dilapidations obligations;

- the provision of a spreadsheet summarising current status of all rating work, particularly the impact of any reduction in ratable value of rates payable;
- the provision of a spreadsheet showing the status of each project.
- At the end of the Delivery Agreement or upon its prior termination, to return to the Client all relevant information and records such as plans, drawings, surveys, records leases, licenses, photographs, whether in hard copy or electronic format.

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