



TASK ORDER FORM

This Task Order has been prepared in accordance with the Framework Agreement between Scape Procure Limited and Perfect Circle JV Ltd dated 29th January 2021 and the following NEC3 Option G Delivery Agreement between Perfect Circle JV Ltd and the *Employer* named below:

DETAILS OF ASSOCIATED OPTION G DELIVERY AGREEMENT:

Agreement Title

Commission No.

Estate Master Planning Strategy Guide

3232

Date of Original Agreement

26/07/2021

TASK ORDER DETAILS:

1. the *Employer*

Defence Infrastructure
Organisation

2. the
Consultant

Perfect Circle JV Ltd

of whose registered office is

Address for
communications

DIO HQ
St Georges House
Kingston Road
Sutton Coldfield
West Midlands B75 7RL

Address for
communications

Halford House
Charles Street
Leicester
LE1 1HA

Telephone

REDACTED

Telephone

REDACTED

Address for
electronic
communications

REDACTED@mod.gov.uk

Address for
electronic
communications

REDACTED@gleeds.com

The Lead Partner
for this Task
Order is:

Gleeds Cost Management Ltd

Task Order Title

Task Order No.

Milestone 7 EMH - Energy Masterplanning Handbook

3232-007



The *Consultant's* Offer and *Employer's* Acceptance

The *Consultant* offers to provide the Services described in this Task Order in accordance with the *conditions of contract* for an amount to be determined in accordance with the *conditions of contract*.

The price is based upon: Fixed Price X Time ☐

Charges

The offered total of the Prices is: £ 70,982.88

Nb. where time charges are used, the total is the estimated value of the Task Order. The *Consultant* should set out, either in a Service Request or through other supporting documentation how the Prices have been derived.

Task Order Dates

Expected start date Expected completion date

01/08/2022 28/02/2023

Task Description

The following details the Services to be provided by the *Consultant*.

The attached Service Request (Part C) details the full requirements of this Task Order and provides for a total fee of £70,982.88




Service Request: Attach

If a Service Request has been used to develop the scope of this task order, please attach it here.



Other Supporting Information.

One or more files may be itemised and attached below and on the following page. Please upload documents in the order you wish them to be appended.

Ref	Item Description	Attach
Doc 1	220810 V2 DIO Draft Programme	
Doc 2	220810 V4 DIO EMH Energy Masterplanning Handbook Proposal DRAFT	
Doc 3	20220817 EMG Statement of Requirements incl MS7	
App A	See Doc 2	



[If the Client chooses to sign the Task Order on paper, only this page should be scanned and uploaded using the DocuSign Print and Sign function]

Executed for and on behalf of
Defence Infrastructure Organisation

by

)

) **REDACTED**

)

15/9/2022

.....
Authorised Signatory

REDACTED

.....
Full name

Senior Commercial Officer

.....
Position/title

Executed for and on behalf of

)

Perfect Circle JV Ltd

REDACTED

14/9/2022

.....
Full name

Director

.....
Position/title

Service Request Proposal

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 VFM 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.

Part A - Outline Service Requirements

Client Name	Defence Infrastructure Organisation		
Commission No.	3232-007	Commission Name (Title)	Milestone 7 EMH - Energy Masterplanning Handbook
Commission Description	Develop a complementary Energy Masterplanning Handbook (EMH) to support the wider strategic thinking required on an establishment to plan for reducing energy consumption to net zero and support the consistent development of future EMPs		Commission Postcode G28EX
Client Contact Name	REDACTED	Client Contact Email	REDACTED@mod.gov.uk
Client Contact Position		Client Contact Telephone Number	REDACTED
Lead Partner - Company Name	Gleeds Cost Management		Commission Lead Contact Name REDACTED
Commission Lead Contact Email	REDACTED@gleeds.com	Commission Lead Contact Mobile	REDACTED
		Region	West Midlands
Main Contract Type	Option G (NEC3 Professional Service Contract) - Task Order	Lead Partner's Service Manager (or NEC3 PM)	REDACTED
Procurement Method	Lump Sum	Client anticipated end date	28 Feb 2023
Client estimated budget for Commission £	70,982.88	If yes, upload document	<u>220810_V2_DIO_EMH_Draft_Programme.pdf</u> (20 KB)
Client anticipated start date	01 Aug 2022		
Has a Client's draft/outline programme been appended?	Yes	Other Document Comments 1	
If yes, please provide commentary			
Other Document Upload 1	<u>20220817_EMG_Statement_of_Requirements</u> (209 KB)		
Other Document Upload 2		If yes, upload document	<u>220810_V4_DIO_EMH_Energy_Masterplanning</u> (1006 KB)
Other Document Upload 3			
Has a Client's Project Brief been appended?	Yes		
If yes, please provide commentary			
Has a Scheme Layout been appended?	No		
Are there Client Proposed Organisations?	No		

Part B - Pre-Engagement Activity Checklist

Are Pre-Engagement Matters required? No

Part C - Detailed Service Requirements

- 1.1 Project Overview/Background
- 1.1 This proposal has been prepared by Perfect Circle (PC) in response to discussions with Defence Infrastructure Organisation (DIO) over the spring / summer of 2022. The responding scope of activities reflects these discussions and the interpretation of services documented in this proposal; these are summarised below.
- 1.2 The DIO's EMG (Establishment Masterplanning Guide) and associated toolkits that have recently developed by Perfect Circle provide the basis for guiding future MOD Establishment masterplans and are presently being tested out on a series of live Establishment Management Plans (EMPs).

1.3 The ongoing programme of EMPs being developed for each establishment will provide a site-by-site record of future evolution based on capability need. They follow a standard process with some elements of the work covering energy aspects, and how the establishment can reach Net Zero.

1.4 This is set within the context of the MOD supporting the delivery of the UK Government's sustainability objectives and contributing towards the UN Sustainable Development Goals. In a MOD context sustainability is about ensuring resilience and adaptability to ensure a considered response to future risks and their influence on defence capabilities whilst respecting and minimising the impacts on the environment, availability of resources, changes in the climatic and geographical arena. (See <https://www.gov.uk/government/collections/sustainable-development-mod> and <https://www.gov.uk/government/organisations/ministry-of-defence/about/our-energy-use>)

1.5 The energy assessment approach uses tools which have been generated as part of the MEP (Modern Energy Partners) programme (a BEIS funded innovation programme) which targeted consistent development of decarbonisation plans for the built estate.

1.6 Historically where EMPs have been generated for an establishment the Energy Masterplan has been produced by the Area Utilities Managers (AUM's) and reflected the energy status of the site and collected the data. These were never completed for all sites and where developed not used.

1.2 Objectives/Outcomes

1.7 Bringing together the learning of the EMG and MEP there is an opportunity develop a complementary Energy Masterplanning Handbook (EMH) which will support the wider strategic thinking required on an establishment to plan for reducing energy consumption to net zero and supports the consistent development of future EMPs.

1.8 Preparation of the EMH will be undertaken with reference to a number of contemporary studies and documents including: Energy Master Planning toward Net Zero Energy Resilient Public Communities Guide, International Energy Agency (IEA) 2021; and Ministry of Defence Climate Change and Sustainability Strategic Approach, MOD, 2021; Net Zero Strategy: Build Back Greener, BEIS, 2021; and Heat and Buildings Strategy, BEIS, 2021.

1.9 The EMH should be read in conjunction with the Carbon Net Zero Design Guide (CNZDG) that is presently being prepared by AECOM for DIO. The CNZDG is focused on individual elements within the wider estate and associated design solutions with the potential to deliver more sustainable, resilient and net zero carbon development whereas the EMH takes the perspective of an Establishment wide energy/decarbonisation management solution and associated future actions. It is therefore important to stress at this point that the two guides are complementary and can work together to achieve an overall net-zero solution.

The relationship between the various EMP and EMGs is illustrated in Figure 1.1 within the project brief attached.

2.0 Health, Welfare, Safety, Environment and Sustainability Considerations

This requirement is covered within the project brief where applicable to the Energy Masterplanning Handbook production.

3.0 Value for Money Statement

The EMH will focus on adaptability and flexibility of the estate. The EMH will provide advice on the ability to adapt in different circumstances while delivering military capability and value for money optionality.

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)	6) Innovative solutions
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

5.0 Social Value

The Framing Sessions have helped provide a concise understanding of the necessary technical and data capabilities to support the requirements of the EMH produced within Milestone 7. This has included the identification of Critical Success Factors, defined by a

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.

- Local spend on projects, reporting on spend within 20 miles of commissions - our target is 45% of the commission value to be within that 20 miles
- Small and Medium (SME) spend, targeting greater engagement of SME’s in our supply chain - our target is 85% of spend with our supplier chain to be SME suppliers
- Fair payment, ensuring we pay our supply chain within 19 days of receipt of invoices - our target is 100% of our invoices to be paid within 19 days

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 additional metrics against the National Data Set of TOMs (Themes, Opportunities, Measures), we confirm that additional measures are not required on this commission.

TOMS Measures

NT Ref (1)	NT18 - Total amount (£) spent in LOCAL supply chain through the contract	Comments (1)	Unit £	SV <i>REDACTED</i> Proxy Value	Target <i>REDACTED</i> (1)	SV <i>REDACTED</i> Add £ (1)
NT Ref (2)	NT19 - Total amount (£) spent through contract with LOCAL micro, small and medium enterprises (MSMEs)	Comments (2)	Unit £	SV <i>REDACTED</i> Proxy Value	Target <i>REDACTED</i> (2)	SV <i>REDACTED</i> Add £ (2)
NT Ref (3)	NT61 - Fair Payment - Percentage of invoices on the contract paid within 30 days	Comments (3)	Unit %	SV <i>REDACTED</i> Proxy Value	Target 0 (3)	SV <i>REDACTED</i> Add £ (3)
NT Ref (4)		Comments (4)	Unit	SV Proxy Value	Target (4)	SV 0.00 Add £ (4)
NT Ref (5)		Comments (5)	Unit	SV Proxy Value	Target (5)	SV 0.00 Add £ (5)
NT Ref (6)		Comments (6)	Unit	SV Proxy Value	Target (6)	SV 0.00 Add £ (6)
NT Ref (7)		Comments (7)	Unit	SV Proxy Value	Target (7)	SV 0.00 Add £ (7)
NT Ref (8)		Comments (8)	Unit	SV Proxy Value	Target (8)	SV 0.00 Add £ (8)
						SV (£) <i>REDACTED</i> Total

6.0 Detailed Scope of Services	
6.1 Description of the Services to be Provided	<p>At this stage of the proposal development, we have worked on a Four Stage Structure for the required EM-I activities generally based on experience of developing the EMG. The stages, activities and outputs are summarised below:</p> <p>Stage 1: Capturing Baseline Energy Consumption and Site Data</p> <ul style="list-style-type: none">• Inception kick-off workshop with DIO• The primary scope of the workshop will be to:<ul style="list-style-type: none">○ Define what data is available in relation to energy consumption on establishments.○ Capture how this is influenced by service, location, age and condition (renewal/refurbishment).○ Establish stakeholders that the team should engage with from IO / TLB / service providers / etc.• DIO baseline position workshop.• This workshop will present the initial baseline findings to DIO and seek confirmation that the output will add value.• Output: Baseline Energy Consumption and Site Data Report. <p>Stage 2: Overlaying External Influencing Factors</p> <p>Initial long list of core influencing factors to be defined</p> <ul style="list-style-type: none">• This will be presented in a knowledge sharing workshop with the stakeholders identified in Stage 1. It will evaluate:<ul style="list-style-type: none">○ Future energy cost forecasts and time of day tariffs (where available).○ Defined scope and boundaries of site and Net Zero options.○ Variable characteristics and end point Net Zero options.○ Case study examples (MEP and EMPs).• The output from the workshop will inform the development of the EM-I output structure and the components that will be incorporated into the handbook. These could include:<ul style="list-style-type: none">○ A written guide describing who should use the EM-I, what the benefits are and when it should be adopted in the EMP lifecycle.○ An EM-I Sandbox that will allow graphic illustration of energy/decarbonisation based spatial decisions.○ A decision tree tool that can be used in establishment workshops to define the primary requirements.○ A matrix of short-term gains, medium-term opportunities and longer-term strategies for cost saving and TCO2e reduction.○ An EM-I excel based toolkit that will identify the optimal energy/decarbonisation strategy for an establishment.• Output: EM-I draft structure including review (and sign-off) with DIO <p>Stage 3: Refining Influencing Factors and Variables</p> <ul style="list-style-type: none">• Based on the feedback received on the draft EM-I structure. This stage will focus on:<ul style="list-style-type: none">○ Mapping onsite decarbonisation variables.○ Capturing and refining differences associated with service/location/energy sources.○ Expansion of guidance information giving best practice (including referencing other sources) and case study examples.• Output: Presentation to DIO and stakeholders describing development of tool/decision structure. <p>Stage 4: Final EM-I and Associated Tools</p> <ul style="list-style-type: none">• The Final EM-I Guide will be tested against up to three case studies, to be provided by DIO.• The outcome of this exercise will be reflected in a revised EM-I that will be issued to DIO for review and comment.• DIO comments will be reviewed in a final workshop.• A Final suite of EM-I documents will be issued.• Output: EM-I Draft and Final documents
6.2 Service / Price Exclusions	<p>The Draft Fee Proposal has been prepared on the basis of an Option G extension of the existing EMG contract. We believe it provides an accurate fee estimation in relation to the EM-I activities. We are happy to review the fee proposal with DIO if required. (A separate PDF of the Draft Fee has also been provided).</p>
6.3 Key Stakeholders, Consultations and Interdependencies	<p>The project will be delivered through transparent partnership working across Perfect Circle Organisations and the DIO. AECOM will lead the consultancy team and provide project leadership with technical leadership provided by Modern Energy Partners and Low Carbon Estates.</p> <p>Key team members are confirmed in the organogram (Figure 3.1 within the project brief).</p>
6.4 Summary of Services at Each Project Stage	
<p>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.</p>	

Prime Core - RIBA (✓)		0-1*	2	3	4	5	6	7	Procurement Route
Project Management	Gleeds Cost Management	Yes	No	No	No	No	No	No	SFR
Quantity Surveying		No	No	No	No	No	No	No	
Core - RIBA Stages (✓)									
Building Surveying		No	No	No	No	No	No	No	
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	

Non Core Services									
Service	Supplier	0-1* on time charge	2	3	4	5	6	7	Procurement Route
Carbon & Energy	Low Carbon Estates Limited	Yes	No	No	No	No	No	No	SFR
Project lead		AECOM	Yes	No	No	No	No	No	SFR
Sustainability & Net Zero	Energy Systems Catapult Systems Ltd	Yes	No	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 using rates agreed with the Client
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 (ins urances/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.

6.5 Sub-consultant Selection Scape framework, direct award and Competitive Tender Award
Criteria

6.6 Appointment of Principal Designer Principal Designer is not required

7.0 Delivery Team CV's not required - Key team members are confirmed in the organogram (Figure 3.1 within the project brief).

Delivery Team - document upload

8.0 Delivery Programme

Our proposed delivery programme is as follows:

Would you like to upload your No own Project Programme

Delivery Programme

There are no records to display.

9.0 Schedule of Deliverables

The stages, activities and outputs are summarised below:

Stage 1: Capturing Baseline Energy Consumption and Site Data

- Inception kick-off workshop with DIO
- The primary scope of the workshop will be to:
 - Define what data is available in relation to energy consumption on establishments.
 - Capture how this is influenced by service, location, age and condition (renewal/refurbishment).
 - Establish stakeholders that the team should engage with from IO / TLB / service providers / etc.
- DIO baseline position workshop.
- This workshop will present the initial baseline findings to DIO and seek confirmation that the output will add value.
- Output: Baseline Energy Consumption and Site Data Report.

Stage 2: Overlaying External Influencing Factors

Initial long list of core influencing factors to be defined

- This will be presented in a knowledge sharing workshop with the stakeholders identified in Stage 1. It will evaluate:
 - Future energy cost forecasts and time of day tariffs (where available).
 - Defined scope and boundaries of site and Net Zero options.
 - Variable characteristics and end point Net Zero options.
 - Case study examples (MEP and EMPs).
- The output from the workshop will inform the development of the EMH output structure and the components that will be incorporated into the handbook. These could include:
 - A written guide describing who should use the EMH, what the benefits are and when it should be adopted in the EMP lifecycle.
 - An EMH Sandbox that will allow graphic illustration of energy/decarbonisation based spatial decisions.
 - A decision tree tool that can be used in establishment workshops to define the primary requirements.
 - A matrix of short-term gains, medium-term opportunities and longer-term strategies for cost saving and TCO2e reduction.
 - An EMH excel based toolkit that will identify the optimal energy/decarbonisation strategy for an establishment.
- Output: EMH draft structure including review (and sign-off) with DIO

Stage 3: Refining Influencing Factors and Variables

- Based on the feedback received on the draft EMH structure. This stage will focus on:
 - Mapping onsite decarbonisation variables.
 - Capturing and refining differences associated with service/location/energy sources.
 - Expansion of guidance information giving best practice (including referencing other sources) and case study examples.
- Output: Presentation to DIO and stakeholders describing development of tool/decision structure.

Stage 4: Final EMH and Associated Tools

- The Final EMH Guide will be tested against up to three case studies, to be provided by DIO.
- The outcome of this exercise will be reflected in a revised EMH that will be issued to DIO for review and comment.
- DIO comments will be reviewed in a final workshop.
- A Final suite of EMH will be documents will be issued.
- Output: EMH Draft and Final documents

10.0 Design Specifications and Not required

Technical/Quality/Regulatory
Standards

11.0 BIM Requirements and BIM not required in SoR
Document Control

12.0 Client Acceptance Criteria Complete and comprehensive EMH covering as detailed in the project brief.

13.0 Risks and Opportunities

Risks

- Data requirements / tool kit functionality beyond the template and end users;
- The effectiveness of stakeholder engagement throughout the EMH outputs;
- The need for further stakeholder sessions beyond the original scope;
- Impact of (non-)availability of required resources across the Defence Organisation to assist with data information, queries regarding

laydown assessment and sign-off of work complete;

Opportunities

- The use of Option G provides flexibility over commissioning via task orders and work required throughout the project which allows a more agile process and approval of optional outputs going forward;
- Additional / enhanced advice across Perfect Circle – technical survey / consultancy advice;

14.0 Prerequisites,
assumptions and constraints

The EMH guidance document will look at the potential outcomes that could be applicable to an establishment. This will be based on the learning from the MEP programme, the completed EMPs and via a steer from the Infrastructure Energy Emissions Sub-Strategy (IEESS)

15.0 Requirements for Surveys, Supplied by client

Investigations and Third-Party
Historic Data

A - Charges for Prime Core Services RIBA 0.00
Workstages 2-7 £

B - Charges for Core Services RIBA	0.00
Workstages 2-7 £	

C - Time Charges £ REDACTED

D - Sub Total: Charges for Prime Core, Core **REDACTED**
Services and Time Charges £

E - External Consultancy Commissions £	0.00
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Total of Charges £ **REDACTED**

F - PSC / PSSC Fee £ REDACTED

Total Commission Value £	70,982.88
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G - Disbursements £	0.00
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Overall Commission Value £	70,982.88
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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)

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:

Service % Charges

[illegible]

Time Charges										
	Project Manager	Quantity Surveyor	Architect	Building Surveyor	Electrical Engineer	Mechanic Engineer	Structural Engineer	Commercial Surveyor	Non Core	Total Fee
0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
1	REDACTED	0.00	0.00	0.00	0.00	0.00	0.00	0.00	REDACTED	REDACTED
2	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
3	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
4	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
5	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
6	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
7	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Sub Total	2,018.80	0.00	0.00	0.00	0.00	0.00	0.00	0.00	REDACTED	REDACTED

Total Charges										
	Project Manager	Quantity Surveyor	Architect	Building Surveyor	Electrical Engineer	Mechanic Engineer	Structural Engineer	Commercial Surveyor	Non Core	Total Fee
0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
1	REDACTED	0.00	0.00	0.00	0.00	0.00	0.00	0.00	REDACTED	REDACTED
2	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
3	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
4	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
5	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
6	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
7	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Total	REDACTED	0.00	0.00	0.00	0.00	0.00	0.00	0.00	REDACTED	REDACTED

Escalators										
	Project Manager	Quantity Surveyor	Architect	Building Surveyor	Electrical Engineer	Mechanic Engineer	Structural Engineer	Commercial Surveyor	Non Core	Total Fee
Contract Lead	0.00		0.00	0.00	0.00	0.00	0.00 0.00	0.00	0.00	0.00
Support	0.00		0.00	0.00	0.00	0.00	0.00 0.00	0.00	0.00	0.00

Disbursements

There are no records to display.

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 variable have been used.

Time Charges									
Discipline	Supplier	If Non-Core, please state Service	RIBA Stage	Enter Task Details	Staff Grade	Estimated Duration in Hours	Hourly Rate (ex VAT) £	Total Fee £	
Non-Core	AECOM	Project Lead	1	Project Lead	Director/Partner	REDACTED	REDACTED	REDACTED	
Non-Core	AECOM	Project Support	1	Project Support	Director/Partner	REDACTED	REDACTED	REDACTED	
Non-Core	AECOM	Project support	1	Project support	Consultant or 5 - 10yrs experience	REDACTED	REDACTED	REDACTED	
Non-Core	Energy Systems Catapult Systems Ltd	Head of MEP	1	Head of MEP	Director/Partner	REDACTED	REDACTED	REDACTED	
Non-Core	Energy Systems Catapult Systems Ltd	Sustaina & Net Zero	t1 y	Programme delivery	Senior Consultant or 10 - 15yrs experience	REDACTED	REDACTED	REDACTED	
Non-Core	Energy Systems Catapult Systems Ltd	Sustaina & Net Zero	t1 y	Programme delivery	Director/Partner	REDACTED	REDACTED	REDACTED	
Non-Core	Low Carbon Estates Limited	Carbon & Energy	1	Carbon & Energy consulting	Director/Partner	REDACTED	REDACTED	REDACTED	
Non-Core	Low Carbon Estates Limited	Stakehol managem	r1	Stakeholder management	Associate/Principal Consultant or 15yrs + experience	REDACTED	REDACTED	REDACTED	
Project Manager	Gleeds Cost Managem		1	Service Manager on subconsultant appointment and general project support	Graduate - Degree qualified and < 5yrs experience	REDACTED	REDACTED	REDACTED	

Where non-core services are provided by our Perfect Circle Partners and Suppliers that 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' non-framework rates, as referenced in section 6.4 above

External Consultancy
There are no records to display.

17 Delivery Agreement Professional Services Contract Model

17.0 Delivery Agreement Professional Service Contract Model. 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:

Appendix A

Scope of Services Lot 1 220810_V4_DIO_EMH_Energy_Masterplanning_Handbook_Proposal_DRAFT.pdf (1006 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 attender 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 other wise 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.

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)

