

St Ives Guildhall Renewal

Invitation to Tender: StIves-ITT-0006-22

Appendix 3: SCHEDULE PF COST CONSULTANCY SERVICES

DEVELOPMENT PHASE: Review RIBA Stage 0/1

Project Initiation & Feasibility (RIBA Stage 0/1) The QS is to support work of the design team in preparing documentation for finalising the key funding bids and to provide an 'Order of Cost' estimate based on their work and to be included in the brief.

QS to review Order of Costs submitted as part of the Feasibility Study

RIBA Stage 2: Concept Design

Research information:

1. Consider programme, cost, risks and environmental issues and assess financial constraints
2. Review cost estimates of feasibility, site surveys and investigations and appraise constraints
3. Identify any additional information required. Provide information, analysis and advice:
4. Participate in the development of the Project Brief
5. Advise on the cost effect of initial design and energy options, including cost estimates of the major design elements in order to inform the design process, including a 10 Year Management & Maintenance Costs
6. Consider financial implications of comments on design studies from design team, client and users.
7. Provide initial elemental cost plan (in accordance with the New Rules of Measurement) to be based on Concept Design proposals in accordance with the Strategic Brief and developing Project and provide initial cash flow projection.
8. Review initial design risk assessments with the design team and CDM Principal Designer and assess any financial implications both in construction and use.

Typical Stage 2 QS Deliverables

9. Initial elemental cost plan.
10. Initial cash flow projection.
11. Stage 1 cost report.
12. Costed Risk Assessment
13. Updated Project Cost summary.

14. Consultation with key agencies and stakeholders, including Cornwall Council's planning and conservation staff will be required at this stage to develop the detailed project brief.

RIBA Stage 3: Developed Design

This Stage will focus on the submission of the Planning and Conservation Area Consent application and developing the scheme to the level of detail required for the key funding agency. Contribute to the formulation of a 10-year Management & Maintenance Plan to be embedded within the business plan. Support the formulation of a procurement strategy, including brief for the main contractor and any other significant sub-contractors, including for the fit-out of the performance space.

Management Duties:

1. In conjunction with the Design Team coordinate and present detailed proposals and cost plan, to the lead consultant and Client Project Steering Group at a formal Scheme Design Review prior to formal issue of Stage 3 end report to the Council.
2. Provide Information, Analysis and Advice
3. Contribute to the on-going development of the Project Brief.
4. Evaluate scheme design proposals; complete any necessary cost studies to ensure compliance with the brief and cost plan.
5. Continually update cost plan, in accordance with the New Rules of Measurement, advising on critical elements.
6. Advise on the implication of establishing compliance in principle with statutory requirements.
7. Review design co-ordination and development with the Architect, and advise on the cost implications of design risk assessments.
8. Provide cost information necessary to assist the Architect in making and negotiating full development control, conservation area consents with the local authority planners, engineers, surveyors and other relevant departments.

Typical Stage 3 QS Deliverables

9. Firm elemental cost plan and updated cash flow projection, in accordance with the New Rules of Measurement.
10. Updated Costed Risk Assessment
11. Contract procurement options report
12. Stage 3 Cost report.
13. Cash flow projection
14. Updated Project cost summary.
15. Priced 10-year maintenance schedule

At the end of RIBA Stage 3 and the submission of the statutory consent application there will be a break clause. All subsequent Stages through to completion are subject to funding being secured and satisfactory performance.

QUANTITY SURVEYING SERVICE BRIEF

DELIVERY PHASE

RIBA Stage 4: Detailed Design, Production & Tender Information

Provide Information, Analysis and Advice

1. Continuously check cost of design against cost plan and advise the project lead consultant, client and architect where the current estimate is likely to be exceeded. This should be an iterative ongoing process.
2. Collaborate with Design Team and provide cost advice to consider actions necessary to contain Project cost within agreed budget.
3. Prepare updated elemental cost plan and cash flow projection.
4. Provide procurement advice and assist client in contractor selection processes
5. Prepare bills of quantities measured in accordance with the latest version of the standard method of measurement for building works.
6. Advise on contract conditions, to include preliminaries, contingencies, access, working and storage areas, work sequence and phasing.
7. Assemble tender documentation.
8. Assist in setting up and running contractor selection procedures and confirmation of tender list
9. Provide pre-tender estimate.
10. Provide support around the appraisal of tenders and undertake any negotiations with tenderer(s) authorised by the client representative.
11. Provide tender report.
12. Contribute to the preparation and assembly of the main contract documents.
13. Attend and contribute to pre-contract meeting.
14. Provide cost information to assist the lead consultant, architects and client team, submit, negotiate and obtain Building Regulation approval and all other statutory approvals.

Typical Stage 4 Deliverables

12. Updated cost plan and cash flow projection.
13. Updated Project Cost summary.
14. Updated costed risk register
15. Pre-tender estimate.
16. Assist in selection of suitable contractors for inclusion in tender list
17. Bills of quantities, measured in accordance with the standard method of measurement for building works.
18. Preparation of tender documentation for lead consultant and client approval and issue to selected contractors
19. Record of responses to tenderers queries.

Tender report.

20. Provide co-ordinated contract documentation and bills of quantities (including any tender amendments) for contract.

It is anticipated that the works will be procured mainly as a single contract, competitively tendered in a traditional single stage JCT SBC/Q contract. There may be minor enabling works or sectional completion requirements for programming reasons.

RIBA Stage 5: Construction

Inspection and Compliance Duties

1. Make regular visits to the site, at least once monthly, co-ordinated by the
2. architects, or more frequently should the need arise, to assess the value and progress of the work being executed by the Contractor. Assist in the resolution of any queries received.
3. Receive reports from the Contractor, lead consultant and design team for
4. comment and take action as appropriate.
5. Contribute to architect's monthly report.
6. Attend contract progress meetings and present a monthly Quantity Surveyors report; and attend all other appropriate meetings as requested by the project lead consultant. Where appropriate, these may be combined with visits required under 1.
7. Assist in value engineering and monitoring contingency allocation and spend as necessary to ensure the capital works are delivered within the available client budget
8. Provide Information, Analysis and Advice on potential variations to the contract works and their cost impact
9. Respond to reasonable requests for additional information from main contractor, sub-contractors and specialist suppliers and contractors.
10. Collaborate with the lead consultant and contract administrator to evaluate and advise on any claims from the Contractor in respect of extensions of time and loss and expense.
11. Valuation of variations to the contract as a result of lead consultant and contract administrators instructions, liaising with the Contractor as necessary.

Typical Stage 5 QS Deliverables

12. Financial statements at monthly intervals, including variations report, contingency reconciliations, retention statements and final account projections.
13. Interim valuations in accordance with Building Contract.
14. Calculate any deductions and additional retentions for defective works on advice from architect and contract administrator
15. Monthly financial statement and cash flow projection.
13. Advise the lead consultant and contract administrator on the need for instructions to vary the Building Contract.
14. Advice on contractual claims.
15. Response to reasonable requests for additional information.

RIBA Stage 6: Handover and Close Out

16. Attend and contribute to the Post Project Review. Inspection and Compliance Duties
17. Comment on defect reports, determine necessary action and advise the Works Administrator.
18. Assist the contract administrator with reviewing decisions affecting the completion date within the period prescribed in the Building Contract.
19. Issue final valuation following receipt of notification from contract

administrator that all defects have been made good.

Typical Stage 6 QS deliverables

20. Agreed final account signed by the contractor.
21. Final valuation certificate.
22. Input into Post Project Review.