

REQUIREMENTS INFORMATION HARD FM

BOOKLET 3

REQUIREMENTS INFORMATION – HARD FM

IN RELATION TO

FACILITIES MANAGEMENT ON OPERATIONS (AFRICA)

**CONTRACT NUMBER:
709303453**

This is one of six booklets as listed below that together, comprise of the Facilities Management on Operations (FMO) Contract.

DOCUMENT No.	TITLE
Booklet 1 of 6	DEFFORM 47 <i>(Only Included at Invitation to Tender)</i>
Booklet 2 of 6	Conditions of Contract (including Contract data) Schedule of Amendments to NEC4 TSC Option A (as amended)
Booklet 3 of 6	Requirements Information – Hard FM
Booklet 3.5 of 6	Requirements Information – Soft FM
Booklet 4 of 6	Client Supplied Data
Booklet 5 of 6	Pricing Information
Booklet 6 of 6	Contractors Plan

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3.1 Introduction

3.1.1. The role of the MOD (the *Client*) is to protect the people of the UK, prevent conflict and be ready to fight our enemies. The Permanent Joint Headquarters (PJHQ) is part of the MOD that provides and maintains infrastructure across the operational estate including Hard Facilities Management (HFM) services. The provision of HFM services is a key enabler in the support of operational capability, by contributing to the health and safety of Armed Forces personnel, their motivation, and their satisfaction. HFM services provide the benign environment that overlays and incorporates the physical infrastructure to support personnel during their deployments and therefore is key to maintaining an effective operational capability.

3.1.2. The Operational Estate is unique in its requirements to support operations in [REDACTED]. It requires HFM services to maintain the physical infrastructure, and unique support services to enable operational support and a safe place to live and work for site occupants. The Services provided by the *Contractor* shall be capable of adapting to the changing needs and expectations of the *Client*, the Government, and other stakeholders. The *Contractor* shall ensure that technological innovations and advances are fully embraced, increasingly ensuring, at all times, that industry norms and best practice is delivered.

3.1.3. The *Contractor* shall manage the services within the Affected Property in accordance with the requirements of the Service Information. A Modular approach has been adopted to enable the provision of diverse stakeholder requirements whilst offering a consistent service to all sites in the Contract. The Modules are applied across this Contract to ensure coherence and a common End User and Occupant experience, except where impracticable or unachievable due to conditions stipulated within extant agreements between the UK and the Host Nation, details of which can be found in Booklet 4 - Employer Supplied Information.

3.1.4. Elements of the requirement will be subject to Inclusive Repair Limits (IRL). Where an IRL is specified, labour, materials, plant, and consumables up to that value will be included within the relevant fee area for that particular Module. The *Client* has the right to include additional alternative IRL options annually (effective from the start of a year) from Year 2 of the Contract onwards. The *Client* will review and specify the IRL level on a yearly basis at Contract anniversary.

3.1.5. The Asset Register and information detailed in Booklet 4 in the Contract documents has been described in good faith, there may be some discrepancies as a result of continued work during the tender process. The *Contractor* shall be fully responsible for the maintenance and repairs of similar plant and equipment located within the managed buildings or other areas, whether it has or has not been detailed correctly in the Contract, until it can be brought to the *Clients* attention. Major plant items, additional floor area either as part of an existing building or new building and change in use, as detailed within Booklet 5 will be subject to an addition/deletion procedure. Minor changes are deemed to be included for maintenance within the Contract lump sum (such as additional socket outlets added, change of type or model of air conditioning unit, addition of window blinds, internal partition addition, etc).

3.2 Operational Estate

3.2.1. Through this Contract the *Contractor* shall deliver HFM services that supports the use of the UK's Operational Estate in the [REDACTED]. The *Contractor* shall deliver a Contract maintaining statutory compliance of the estate keeping it safe and legal to use, fit for UK Defence and better for the society of the nation.

3.2.2. The Operational Estate currently consists of 4 establishments which comprise the Level 1 Assets of the Contract: [REDACTED] and [REDACTED] in [REDACTED] and [REDACTED] in [REDACTED]. Full detail of all constituent Level 2¹ Assets in scope of the Contract are contained in the *Client* Supplied Information at booklet 4.

3.2.3. Over the term of the Contract, it is expected that there will be changes in the size and shape of the estate as a result of changing policy, this may include delivering plans to optimise the use of the estate and rationalise assets.

3.2.4. There is a strategy to improve the management of data, moving towards one reliable and accurate set of data used multiple times, and it is likely that automation and technological advancements could offer significant opportunities to support the better delivery of Services. The *Contractor* will be required to work collaboratively, reacting to changes in data management and reacting to advances in technological capacity, to deliver one reliable and accurate set of data used multiple times.

3.3 Relationship

3.3.1. The Contract will be managed on behalf of the *Client* by a team comprising of both Military and Civilian personnel. The *Contractor* will work collaboratively at all levels with the *Client's* management team and the Military chain of command. The term *Client* is used throughout the specification and relates to the *Client* and the *Client's* Governance Structure. The FMO(A) *Client's* Governance Structure is shown below:

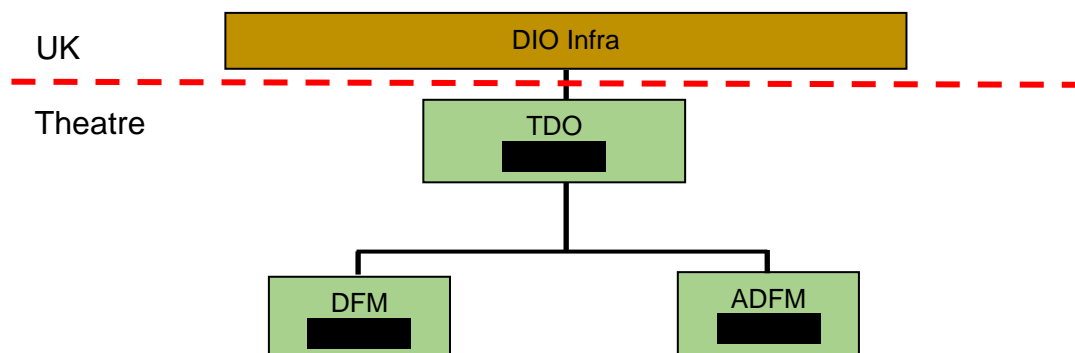


Diagram 1 – Example of a possible *Client's* Governance Structure

3.3.2. The *Client* is represented by PJHQ in which Demand and Supply responsibilities come together. PJHQ J8 has financial authority for the Contract and contractual authority rests with DIO Commercial (Operations International (Commercial)).

¹ Level 2 assets relate to buildings or significant systems such as site electrical and water supply or drainage.

Requirements and justifications for expenditure are articulated by the Designated Officer (DO) PJHQ in conjunction with commercial staff [REDACTED] of deployed military units.

3.3.3. Delivery to meet the requirement is co-ordinated and monitored by the Theatre Designated Officer (TDO) and the Facilities Management Staff. The *Client* will provide an appropriate FM team with assistants across the estate. The *Contractor* is responsible for the delivery of the service described in this document and is expected to provide a clear management structure. Good communications at each level are essential to facilitate an open and collaborative working relationship.

3.4 Constituent Parts

3.4.1. The Table of Services contained in Annex A – Table of Services details the constituent parts of the Requirement and their contents. In summary:

3.4.2. Core requirements:

- 3.4.2.1. Module A – Management Services
- 3.4.2.2. Module B - Helpdesk
- 3.4.2.3. Module C – IS and DATA Management
- 3.4.2.4. Module D – Contract Mobilisation and Demobilisation
- 3.4.2.5. Module E – Statutory and Mandatory Obligations
- 3.4.2.6. Module F – Maintenance Services
- 3.4.2.7. Module G – Support Services
- 3.4.2.8. Module H – Grounds Maintenance services
- 3.4.2.9. Module I – Sustainable Development and Environmental Management
- 3.4.2.10. Module J – Miscellaneous Services
- 3.4.2.11. Module K – Not used

3.4.3. Non-Core requirements:

- 3.4.3.1. Module L – Additional Services

3.5 Requirement

3.5.1. The Requirement is broken down into two areas:

3.5.1.1. **Core Service** is non-discretionary services required to keep the Affected Property safe, legal and operational. Modules A-J of this Requirement constitute the Core service:

3.5.1.1.1. All testing, inspections, and servicing in accordance with Statutory and Mandatory and Planned Preventative Maintenance (PPM) requirements, as defined in Module E.

3.5.1.1.2. All associated repairs and reactive maintenance to be delivered through an Inclusive Repair Limit (IRL).

3.5.1.1.3. Professional Services (including design, procurement and management services) required to deliver the Self-Delivery Mechanism (SDM)

(Remedial Maintenance (above the IRL), Response Maintenance and Minor New Works) up to the Threshold Value to Stage 6 (Handover) and up to Stage 2 (Concept Design) for Ordered Works valued above the Threshold Value and below \$325k.

3.5.1.1.4. Sustainable development to include the effective consumption of utilities, replacement of plant, equipment, and delivery of additional infra.

3.5.1.2. **Non-Core Services** are discretionary services that can be called off at the discretion of the *Client* to meet specific customer needs.

3.5.2. The *Contractor* shall have a common understanding of the Contract with the *Client* and deliver the Services to a consistent standard throughout the Affected Property. The full detail of the Services to be provided is set out in this schedule.

3.5.3. The *Contractor* shall have overall responsibility for the delivery of requirements described in the Schedule twenty-four (24) hours a day and three hundred and sixty-five (365) days per annum across the Affected Property. As a minimum, on normal Working Days access to Services shall be provided 0800 to 1700 hours. Working days will be different across different sites but will consist of five and a half (5½) working days, actual working days are to be agreed on a site-by-site basis with the *Client*. Outside of these times and on weekends and public holidays, the *Contractor* shall provide an Out of Hours (OOH) Service described in Module F: Maintenance Services.

3.5.4. The *Contractor* shall accept that a commitment to work outside of the stipulated working hours may arise, which is deemed to be included within the Core Fee, as a result of:

3.5.4.1. Any tasks with frequencies of daily or twice daily.

3.5.4.2. Emergency call-outs.

3.5.4.3. Very urgent works.

3.5.4.4. The need to accommodate any agreed operational requirement of the *Client*.

3.5.4.5. The need to rectify any failure to achieve an adequate level of operation, maintenance or repair.

3.5.5. The *Contractor* through its work, actions and advice shall support Operational Activity by keeping the Affected Property in a Compliant and fit for use Condition.

3.5.6. The Requirement for each location is highlighted at Table 1 below:

					Remarks
A	X	X	X	X	
B	X	X	X	X	
C	X	X	X	X	

D	X	X	X	X	
E	X	X	X	X	
F	X	X	X	X	
G	X	X	X	X	
H	X	X	X		
I	X	X	X	X	
J	X	X	X	X	
L	X	X	X	X	

Table 1 – Requirement by Location

**Annex A to
Booklet 3 – Requirements**

Table of Services

Module	Service	ID	Title
Core Requirements			
A	Management Services	A1	Facilities Condition Management (FCM)
		A2	Transition
		A3	Management of the Service
		A4	Achievement of Value for Money
		A5	Performance Management
		A6	Quality Management
		A7	Stores Management
		A8	<i>Contractor</i> Staff - Competence
		A9	Supervision
		A10	Induction Training
		A11	Identification of <i>Contractor's</i> personnel
		A12	Management of sub-Contractors
		A13	Site Closure and Remediation Management
B	Helpdesk	B1	General
		B2	Service Requests
		B3	Decision Tree
		B4	Access
		B5	Complaints
		B6	Complaints Records
		B7	Complaints Reports
		B8	Staff
C	Information Systems and Data Management	C1	Computer Aided Facilities Management (CAFM)
		C2	Asset Management
		C3	Stores Management
D	Contract Mobilisation and Demobilisation	D1	General
		D2	Mobilisation Period
		D3	Initial Service Delivery
		D4	Transition Period
		D5	Full-Service Commencement
		D6	Evaluation Period
		D7	Learning and Continuous Improvement
		D8	Demobilisation
E	Statutory and Mandatory Obligations	E1	General
		E2	Establishment Specific Task Schedule
		E3	Failures
		E4	Records
		E5	Health and Safety
		E6	Accidents, defects, Failures and Dangerous Occurrences
		E7	MOD Safety Rules and Procedures (Safe Systems of Work / Permits to Work Systems)
		E8	Construction (Design and Management) Regulations 2015 (CDM 2015)
F	Maintenance Services	F1	General
		F2	MOD SFG 20
		F3	Management of Works Services
		F4	Planning of Works Services
		F5	Reactive Maintenance

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		F6	Preventative Maintenance
		F7	Remedial Maintenance
		F8	Inspection Contracts
		F9	Response Times
		F10	Permissible Overdue Period Preventative Maintenance Tasks
		F11	Forward Maintenance Register
		F12	Self-Delivery Mechanism (SDM)
		F13	Inclusive Repair Limit (IRL)
		F14	Occurrence Banding and Value Banding Pricing Schedules
		F15	Practical Completion
		F16	Siting / Handover / Take-over
		F17	Defect Liability Period Inspections
		F18	F1097/1 Process
		F19	Kitchen Deep Cleaning
		F20	Prevention of Legionella
		F21	Airfield and Air Operating Surface Maintenance
		F22	Locksmith Services
		F23	Fire Alarm Testing / Free Standing Fire equipment
		F24	Portable Appliance Testing (PAT)
G	Support Services	G1	Support and Advice
		G2	Reporting
		G3	Facilities Manager Clerical Assistant
		G4	Surges and Relief in Place (RiP)
		G5	Client Business Continuity Plan (BCP)
H	Grounds Maintenance	H1	General
		H2	Clearance and weed Control
		H3	Grassed Areas
		H4	Explosive Storage Areas
		H5	Tree Maintenance
		H6	Pest Control
		H7	Sports Facilities and Artificial Surfaces
		H8	Irrigation
I	Sustainable Development and Environmental Management	I1	Management
		I2	Sustainable Procurement
		I3	Environmental Management Plans
		I4	Carbon Net Zero
		I5	Climate Change
		I6	Environmental Protection
		I7	Water Management
		I8	Waste Management
		I9	Air Conditioning
J	Miscellaneous Services	J1	Military Secondment
K	Not used		
Non-Core Requirements			
L	Additional Services	L1	Ordered Works
		L2	Technical Working Environment (TWE) Shelters
		L3	Prefabricated Buildings
		L4	Professional Services

Glossary of Terms

Asset (Fixed)

A building, system or any element of a building or system, which is considered separately as a cost centre for maintenance and operation.

Asset (Static)

A construction built on a Land Parcel, and which can be either a Built Structure or a Ground Asset. The former is self-evident, and the latter comprises the likes of Roads, Runways etc. A Level 2 Asset.

Client

The Client and their representatives: Designated Officer (DO), Theatre Designated Officer (TDO), Facilities Manager (FM), Deputy Facilities Manager (DFM).

Carry-in

Those funds, contractually or otherwise, committed to be spent on a particular job, which were not paid by the Financial Management Shared Services Centre (FMSSC) (Liverpool) before the end of the previous FY.

Carry-out

Those funds, contractually or otherwise, committed to be spent on a particular job, which will not be paid by the Financial Management Shared Services Centre (FMSSC) (Liverpool) before the end of the FY. This sum of money will also represent the Carry-in to a new FY.

Commanding Officer

The Head of Establishment or Senior British Military Officer in Theatre.

Condition Monitoring

The continuous or periodic measurement and interpretation of data to indicate the condition of an Asset, Sub Asset or parts thereof, to determine the need for maintenance.

Condition Survey

The Estate Condition Survey is intended to provide an annual update of condition, compliance, purpose and utilisation for all building assets owned by the MoD.

Core Requirement (Deliverable)

The main documents required and approvals specified within this Requirements Document, which will be used to measure the performance of all parties involved. NB. They do not purport to be a comprehensive list of all the duties and responsibilities which must be undertaken on a day-to-day basis.

Core Services

Those Works delivered in support of Facilities Management activities included in the Contract.

Cost Plan

A plan drawn up immediately before the start of each FY on behalf of the Head of Establishment and PJHQ by the FM. This plan shows the planned spend profile of the funds allocated.

Critical Asset/Facilities

Asset or fixed infrastructure that is critical to Combat operations or flight safety.

Data Pack

A document containing details of theatre current assets and maintenance requirements.

Defence Infrastructure Organisation (DIO)

The central professional works organisation that provides an intelligent end-user capability within MOD.

Deputy Facility Manager (DFM)

A person, usually a Royal Engineer WO/SNCO, who is responsible to the FM for the day-to-day management of the contract on an individual or group of sites/establishments. (see Facilities Manager)

Designated Officer (DO)

The DO for the Contract is a suitably qualified appointed officer (or *Client* representative) who is responsible for articulating requirements and justifying expenditure, in conjunction with deployed infrastructure staff. The incumbent SO1 J4 Infra at PJHQ is the DO for this contract.

Draft Works Programme (DWP)

This is derived from the FMR, following joint review by the FM and Contractor.

Emergency Maintenance

The maintenance necessary immediately to avoid serious consequences.

End-user

The end-user is the person(s) holding the day-to-day responsibility for an Asset or Sub Asset on a site.

Energy Management

The management of the storage, conversion, distribution, and utilisation of energy/utilities directed to the economic provision of required services and the elimination of avoidable losses.

Energy/Utilities Target

The desired energy/utility demand of a building or process.

Establishment

A MOD Establishment is defined as a Main Operating Base (MOB), Forward Operating Base (FOB), Patrol Base (PB), Tactical Base (TB) or any other geographical entity on the Defence Estate so designated by the MOD. A Level 1 Asset.

Estimated Costs

An estimated cost is produced using either costs per m² of Gross Floor Area (GFA) or any other method appropriate to the level of information available.

Examination

A comprehensive inspection supplemented by measurement and physical testing in order to determine the condition of an Asset, Sub Asset or part thereof.

Expenditure

Expenditure is categorised as follows:

Authorised Expenditure. The total approved Limit of Liability (LoL) stated on the individual F1097/1s.

Committed Expenditure. The value of contracts placed by the FMS(Ops) for work authorised. This also includes work carried out by their self-delivery [internal] resources, which is outside the scope of the fixed fees.

Facility Management (FM) Team

The *Client's* team, normally comprised of individuals from the Royal Engineers, which is responsible for monitoring and assurance of the contracted outputs on time, within budget and to the required quality. The team normally consists of a Facilities Manager (FM), Deputy Facilities Manager(s) (DFM) and Assistant Deputy Facilities Manager(s) (ADFM)

Feasibility Study

See "Strategic Brief".

Forward Maintenance Register (FMR)

A list of all known future Works Services including VAT and fees that have been identified for theatre. The FMR is used during the preparation of all plans and programmes and should include any Response and Remedial Maintenance items reported to the FM, which will not be undertaken in the FY in which they were identified.

Ground Asset

This is a natural Land based Asset which is not covered by a built, infrastructure or maritime asset. This will include a range of natural occurring features such as woodland, heathland, etc. which require maintenance/management.²

Inclusive Repair Limit (IRL)

The maximum value for a Works task and shall include all relevant and implicit resource costs (e.g. labour, materials, plant, equipment and consumables) necessary for its completion. The IRL will apply to the entire activity related to an occurrence (i.e., a single intervention rather than the aggregation of like activity). Only Remedial Maintenance will be subject to an IRL. IRL tasks are to be costed individually at Level 4 assets (i.e., if 2 no. smoke detector heads are unserviceable each will be costed individually as a distinct IRL

² DIO Specification 024 (024), Part 2, Chap 3, Para 53

task). It should be noted that multiple IRL tasks may be ordered on the same work order, but each will attract its own IRL task.

Inspection

An assessment of an Asset, Sub Asset, or part thereof which, based on professional judgement, will establish its conformity with specific or general requirements in respect of its ability to perform its required function.

Inspection Programme

Produced annually, the Inspection Programme sets out which inspection tasks included in the agreed Site-Specific Schedules are required and when they will be undertaken during the forthcoming FY.

Investment Appraisal (IA)

An assessment of the economic viability of Works Service options, to be carried out in accordance with Treasury/MOD/DIO Guidance for works above a certain threshold, or for works of a novel and contentious nature.

IA Threshold

The financial level above which an investment appraisal must be carried out for any Works Service. This threshold is currently £100k (whole-life costs) including fees and VAT.

Facilities Management on Operations (Africa) (FMO(A) / Contractor

The organisation responsible for providing professional and management advice to assess the condition of assets; find out and record the maintenance needs of the estate; plan, organise and manage the maintenance and repair of plant; maintain and repair assets; design and construct new works; and manage facilities.

J4 Infra Branch

The client's on-site Management Organisation who is responsible for determining the requirement, for liaison with the end-users of the estate and for communication of the requirement to the DO/FM. (see also SO1 J4 Infra Branch)

Key Performance Indicators (KPIs)

The main services which are amenable to quantitative measurement, which will be used to assess the performance of all parties involved in the implementation of this Requirements Document and will make up the criteria on which performance payments will be made. NB. They do not purport to be a comprehensive list of all the duties and responsibilities which must be undertaken on a day-to-day basis.

Level 1 Assets

A Level 1 Assets is, as defined in DE Spec 024. a "*Parcels of Land*". Within this contract such assets are a distinct establishment or location.

Level 2 Assets

A Level 2 Assets is, as defined in DE Spec 024. a "*Managed areas of land or built structures above or below ground*". Within this contract such assets are a distinct building or 'land use' (i.e., a HQ Building or road)

Level 3 Assets

A Level 3 Assets is, as defined in DE Spec 024. a “A *Sub-asset that is a component of, or a fixture for, a Level 2 Asset*”. Within this contract such assets are a component or system within a distinct building or area of land (i.e. electrical system, air conditioning system, sewage system etc.)

Level 4 Assets

A Level 4 Assets is, as defined in DE Spec 024. a “A *component of, or a fixture for, a Level 3 Asset*”. Within this contract such assets are the sub-components of a component or system within a distinct building or area of land (i.e. Distribution board, evaporator unit, window, socket outlet etc.)

Locally Recruited Workers (LRWs)

Those indigenous personnel engaged in theatre, by the Contractor in the delivery of the Contract. Sometimes also known as Third Country Nationals (TCNs).

Maintenance

The combination of all technical and administrative actions, including supervision, intended to retain an Asset, Sub Asset or part thereof in, or restore it to, a state in which it can perform its required function.

Maintenance Category

An indicator attached to an individual item of maintenance, which ensures its parity with other similar work across the Defence Estate.

Maintenance Cost

The total cost of retaining an Asset, Sub Asset or part thereof in, or restoring it to, a state in which it can perform its required function.

Maintenance Inspection

An inspection carried out as part of planned or preventative maintenance.

Maintenance Management

The organisation of maintenance within Facility Management.

Maintenance Programme

A time-based plan allocating specific maintenance tasks to specific periods.

Maintenance Requirements

A statement of the nature of the maintenance method or action needed.

Mandatory Requirements

Any requirements, provisions or conditions that are contained in, or having any effect under the MOD rules, regulations, and policy requirements.

Master Index (MI)

A complete listing of all documents, drawings, plans and records held for every Asset, , Sub Asset, building, system or service. Each document, drawing etc is to be allocated a unique reference number.

Minimum Military Requirement (MMR)

A standard of scope, construction and finish that meets both the statutory and military requirements without unnecessary aesthetic or quality enhancements (i.e. 'Gold-plating'). It is meant to ensure a robust form of construction to provide the lowest whole life costs. This may mean that more expensive, high-quality materials and finishes are appropriate to provide the best overall value for money.

Minor New Works (MNW)

New Works with a value below the Threshold Value stated in the Contract.

New Work

The combination of all technical and administrative actions, including supervision, required to provide a new asset or provide an additional or enhance functional capability of an existing asset.

Non-programmed Works

Works not previously identified within the FMR, which are capable/required for inclusion within the PMP. Work of this nature will normally arise as a directive from a higher authority, a change in operational output, as a requirement of revised legislation, or as a result of an accident or breakdown.

Novel and Contentious Work

When novel or contentious work is contemplated, the DO should consult TLB staff for guidance that will need to consider whether an Investment Appraisal is required. While the terms 'Novel' and 'Contentious' have no precise definition, the following may be used as general guidance:

Novel. Where goods and services have not previously been purchased by MOD, or unconventional methods of funding are being contemplated;

Contentious. Opposing the conclusions of an IA or competitive tender, or likely to arouse public or Parliamentary criticism of MOD, such as the demolition of housing.

Other work in the Novel and Contentious category might be that which produces an out-of-scale amenity exceeding the standards of JSP 315 Services Accommodation Code (See also JSP 434 Defence Construction in the Built Environment – Part 2).

Operation

The combination of all technical and administrative actions, including supervision, intended to enable an asset or part of an asset to perform its required function, recognising necessary adaptation to changes in external conditions.

Option Study

An Option Study will identify all the valid alternative works options that meet the requirements set out in the client's Statement of Requirement (SOR). It will provide information necessary for the preparation of an IA and form the basis for an objective management decision on the preferred option.

Ordered Works

Works Services ordered by the FM using a MOD Form F1097/1, including: Remedial Maintenance which exceeds the IRL cost identified in the Contract and Emergency Work; Response Maintenance and Minor New Works which exceeds the Threshold Value identified in the Contract. Response Maintenance and Minor New Works activities in excess of the Occurrence Banding and Value Banding limits will also be ordered via a F1097/1.

Personnel

Personnel are categorised as follows:

Professional. Staff who are corporate members of professional bodies incorporated by Royal Charter regulating the engineering and construction professions.

Technical. Staff who hold NVQ Level 3, equivalent or higher qualifications in an appropriate discipline together with relevant experience.

Senior Administration. Staff who hold a recognised business qualification.

Administration. Support staff with no technical function, e.g. contracts, accounts, purchasing etc.

Planned Maintenance

The maintenance, including predetermined maintenance, organised and carried out with forethought, control and the use of records to a predetermined plan.

Planned Preventative Maintenance (PPM)

The maintenance carried out at predetermined intervals, or according to prescribed criteria and intended to reduce the probability of failure or the degradation of the functioning of an Asset, Sub Asset or part thereof.

Planning Round

The 4-year forward budgeting process from which the MOD builds up its proposed annual Defence Budget for presentation to Parliament.

Policy Instruction

Mandatory instructions issued by Defence Infrastructure Organisation that, where applicable, govern the standards for estate and construction management

Policy and Technical Publications

DIO produce various Technical Publications that are available for use in the management and construction of MOD's built Estate, this includes but is not limited to Specifications; Policy Instructions; Health and Safety Warning Notices; SRPs; Design and Maintenance Guides and Best Practice Guides. A complete list of the extant publications is recorded in the Technical Publications Index and the quarterly updates produced by DIO.

The Technical Publications Index also refers to some publications, which have been produced by other organizations, including the MOD and a range of commercial bodies and other organizations, which are relevant to works activities on the Defence Estate.

However, it should be noted that the Technical Publications Index concentrates on providing references to DIO and MOD publications and no attempt has been made to cover all technical documents relating to a particular subject. It is the responsibility of individuals engaged in Works Services to ensure compliance with all statutory legislation, regulations and British Standards, and to follow good practice guidelines in all circumstances.

PPM Programme

Produced annually, the PPM Programme sets out which predetermined maintenance tasks included in the agreed Site-specific Schedules are required and when they will be undertaken during the forthcoming FY.

Practical Completion

The Practical Completion is where a Works Service has been completed such that a Certificate of Practical Completion can be issued by the FMS(Ops).

Procurement Strategy (PS)

The PS will be produced annually by a date to be agreed each year, and detail how the FMS(Ops) intends to procure and manage the work on the PMP.

Quantity of Works

The Quantity of Works is that Employer selected quantitative limit (based on area or each item as detailed in booklet 5) under which all Rem and Res tasks are deemed to be included in the lump sum for the contract. Quantities of Works tasks are to be costed individually. It should be noted that multiple Quantity of Works tasks may be ordered on the same work order but each will attract its own Quantity of Works task.

Refurbishment

The extensive work intended to bring buildings or assets up to current acceptable functional conditions, often involving modifications and improvements.

Rehabilitation

Synonymous with Refurbishment.

Remedial Maintenance (Rem)

Work arising from planned routine Schedule A inspections, combined Schedule B and C checks, examinations and inspections identified by the FMS(Ops) and reported through the Help Desk for action (NB - Remedial Maintenance items that cost less than the IRL identified in the Contract will be undertaken by the FMS(Ops) at no additional cost. Remedial Maintenance items above the IRL but below the Threshold Value identified in the Contract will be undertaken by the FMS(Ops), when authorised by the FM, in accordance with the Value Bandings identified in the Contract.)

Repair

That part of maintenance in which actions to renew, replace or mend worn, damaged or decayed parts, are performed on an Asset, Sub Asset or part thereof.

Response Maintenance (Res)

Maintenance work identified by end-users of buildings/facilities³ reported through the Help Desk. (NB - Response Maintenance items below the Threshold Value identified in the Contract will be undertaken by the FMS(Ops) in accordance with the Value Bandings identified in the Contract).

Risk Assessment

The integrated analysis of the risks inherent in an activity, process, system, building asset etc. and the significance of these risks in an appropriate context.

Rough Order of Cost (ROC) Estimate

A ROC estimate produced using functional unit rates, cost per m2 of GFA or any other method appropriate to the level of information available. It is used to aid FM's in predicting their STP requirements, the cost of low value/maintenance work and other budgetary controls.

Safety Rules and Procedures (SRPs)

The documentation pertaining to Safe Systems of Work, prepared by DIO on behalf of the MOD – see JSP 375 H&S Handbook Volume 3.

Schedule of Rates

A list of predetermined rates for new works and maintenance items for various trade disciplines used to value works up to the limits identified in the Contract.

Senior Authorising Authority

The DIO Technical Authority responsible for assessment and technical audit of Authorising Engineers.

Specification

The documents that state the requirements to be met by the Asset, Sub Asset or part thereof or service. NB: A specification may refer to, or include, drawings, patterns or other relevant documents and should indicate the means and the criteria whereby conformity can be checked.

Strategic Brief

A study carried out in accordance with Principal Support Provider (PSP) Handbook for Project Managers Work Stages 1 and 2.

Statutory Requirements

Any requirements or provisions contained in or having effect under any Act of Parliament.

Sub Asset

A component of a static asset e.g., the lift in a building, the water distribution pipework. Usually a Level 3 Asset.

³ End Users can be, but not limited to, any of the following – Building Custodians (BC), Occupants (only via BC), MOD employees (via BC), Contractor's employees (if through this route further FM checks apply).

Contractor

The organisation responsible to the *Client* for providing professional and management advice; to assess the condition of assets; to find out and record the maintenance needs of the estate; to plan, organise and manage the maintenance and repair of plant; the maintenance and repair of assets; the design and construction of new works; and the Management of facilities.

Survey

Depending on the context, survey means: an examination, the written report of which would include a recommendation for any action deemed necessary; or the action of taking and recording measurements.

Test

A technical operation that consists of the determination of one or more characteristics of a given asset, process or service according to a specified procedure.

Theatre Designated Officer (TDO)

The TDO for the Contract is a suitably qualified appointed officer (or Employer representative) who is responsible for the articulation of requirements and justifying expenditure, in conjunction with deployed infrastructure staff. It is SO3 Infra Log Sp Node (Africa)

Threshold Value

A predetermined value identified in the Contract below which Remedial Maintenance, Response Maintenance and Minor New Works activities will be subject to valuation/measurement in accordance with the Employer specified Schedule of Rates. Such activities above this Threshold Value will be ordered by the FM on an F1097/1.

Value Banding

A predetermined schedule of values identified in the Contract detailing a specified number of Remedial and Response Maintenance activities and Minor New Works activities, for each range of values, over a specified time period. Such works activities up to the specified maximum number against each value range will be undertaken by the FMS(Ops) at no additional cost. Any such works activities over the specified maximum number for each value range will be ordered by the FM via an F1097/1.

Works Services

Operation, maintenance and new works including planning, design, management and organisation in respect of an Asset, Sub Asset or part thereof.

Annex C to Booklet 3 – Requirements

List of Abbreviations

Below is a list of abbreviations that are used in Booklet 3 or may be encountered in carrying out the Contract:

ACOP	Approved Code of Practice
AE	Authorising Engineer
AESP	Army Equipment Support Publication
AOS	Aircraft Operating Surfaces
AP0	Accounting Period Zero
APs	Authorised Person
AP	Air Publication
APCGM	Asset Physical Condition Grading Methodology
APS	Annual Procurement Strategy
ARCM	Asset Register Change Mechanism
B&CE	Building and Civil Engineering
BC	Business Case
BCP	Business Continuity Plan
BLR	Beyond Local Repair
BMS	Building Management System
BRE	Building Research Establishment
BS	British Standard
Bud Man	Budget Manager
CAFM	Computer Aided Facilities Management software system
CCTV	Closed Circuit Television System
CDM 2015	Construction (Design and Management) Regulations 2015
CIBSE	Chartered Institute of Building Service Engineers
CIRAM	Climate Impacts Risk Assessment
CLS	Contractor Logistic Supply
CO	Commanding Officer
CORGI	Confederation of Registered Gas Installers
COSHH	Control of Substances Hazardous to Health Regulations 2002 (as amended)
CP	Competent Person
CPP	Construction Phase Plan
CRP	Carbon Reduction Plan
DE	Defence Estates
DEA	Defence Estates Advisor
Def Stan	Defence Standard
DEL	Directly Employed Labour
DFM	Deputy Facilities Manager
DIA	Directorate of Internal Audit
DIO	Defence Infrastructure Organisation
DLP	Defects Liability Period
DMG	Design and Maintenance Guide
DO	Designated Officer
DP	Delivery Package
DQDP	Data Quality Development Plan

DURALS	Defence Unified Reporting and Lessons System
ECA:CP	Electrical Contractors Association: Code of Practice
ECP	Engineer Construction Plant
ECU	Environmental Control Unit
EH	HSE Guidance Note: Environmental Hygiene
EHT	Environmental Health Technician
EMPS	Establishment Maintenance Policy Statement
EMS	Environmental Management System
ESTS	Establishment Specific Task Schedule
FAQ	Frequently Asked Questions
FCM	Facilities Condition Management
F10 (Rev)	HSE Notification Form for CDM 2015 Notifiable Works
F1097/1	MOD Form F1097/1
FM	Facilities Manager
FMR	Forward Maintenance Register
FMS(Ops)	Facilities Management Services (Operations)
FOO	Forecast of Outturn
FP	Force Protection
FS	Functional Standard
FY	Financial Year
GDPR	Government Data Protection Regulations
GEMS	Ground Equipment Management System
GFA	Gross Floor Area or Government Furnished Assets
GFE	Government Furnished Equipment
GFX	Government Furnished Stores and Materials
GM	Grounds Maintenance
H&S	Health and Safety
HFM	Hard Facilities Management
HQ	Headquarters
H&S	Health and Safety
HSE	Health and Safety Executive
HS(G)	HSE Health and Safety (Guidance)
HV	High Voltage
IA	Investment Appraisal
IDP	Infrastructure Development Plan
IEE	Institution of Electrical Engineers
IGBC	Initial Gate Business Case
IMPS	Infrastructure Management Policy Statement
IRL	Inclusive Repair Limit
IRT	Inclusive Repair Threshold
ISD	In-Service Date
IT	Information Technology
JAMES	Joint Asset Management Engineering Solutions
JAP	Joint Air Publication
JSCS	Joint Support Chain Services
JSP	Joint Services Publication
KPI	Key Performance Indicator
L1	Level 1 Assets
L2	Level 2 Assets
L3	Level 3 Assets

L4	Level 4 Assets
LAPDS	Local Area Power Distribution System
LEV	Local Exhaust Ventilation System
LoL	Limit of Liability
LPG	Liquefied Petroleum Gas
LRW	Locally Recruited Worker
LSI	Logistic Support Inspection
LTHW	Low Temperature Hot Water
LV	Low Voltage
M&E	Mechanical and Electrical
MB	Management Board
MCS	Modular Control System
MGBC	Main Gate Business Case
MI	Master Index
MIS	Management Information System
MMR	Minimum Military Requirement
MNW	Minor New Work
MOB	Main Operating Base
MOD	Ministry of Defence
MRM	Monthly Meeting Review
MTHW	Medium Temperature Hot Water
MWPM	Monthly Works Progress Meeting
NAO	National Audit Office
NDC	Nationally Delivered Contribution
NER	Network Equipment Room (sometimes called Server Room)
OIP	Operational Infrastructure Programme
O&M	Operation and Maintenance
ONC	Ordinary National Certificate
PAT	Portable Appliance Testing
PC	Principal Contractor
PD	Principal Designer
PG	DIO/DE Practitioner Guide
PI	DIO/DE Policy Instruction (formerly Technical Bulletin)
PIC	Person in Charge
PJHQ	Permanent Joint Headquarters
PM	Project Manager
POC	Point of Contact
PPM	Planned Preventative Maintenance
PQC	Pavement Quality Concrete
PS	Procurement Strategy
PSP	Principal Support Provider
PSA	Property Services Agency
QA	Quality Assurance
QM	Quartermaster
QMS	Quality Management System
QP	Quality Plan
QRM	Quarterly Review Meeting
REAM	Royal Engineers Auditing and Monitoring
REH	Rapid Erect Hangar
Rem	Remedial Maintenance

Res	Response Maintenance
RES	Rapid Erect Shelter
RIBA	Royal Institute of British Architects
RIDDOR	Reporting of Injuries, Diseases and Dangerous Occurrences Regulations 2013
RiP	Relief in Place
RLI	Restricted Local area network (LAN) Interface
RMP	Royal Military Police
ROC	Rough Order of Cost
SAA	Senior Authorising Authority
SATO	Senior Ammunition Technician Officer
SDM	Self Delivery Mechanism
SECR	Streamlined Energy & Carbon Reporting
SHEF	Safety, Health, Environment and Fire
SLOC	Surface Lines of Communication
SOGE	Sustainable Operation of the Government Estate
SoR	Schedule of Rates
SOR	Statement of Requirement
SP	Skilled Person
SRP	Safety Rules and Procedures
SSoW	Safe Systems of Work
STRE	Specialist Team Royal Engineers
TCN	Third Country National
TDO	Theatre Designated Officer
TLB	Top Level Budget
TWE	Technical Working Environment
UK	United Kingdom
URD	User Requirement Document
VAT	Value Added Tax (or equivalent as applied in other countries)
VfM	Value for Money
VRES	Very Rapid Erect Shelter
WC	Work Complete
WEC	Work and Expenditure Complete
WPM	Work Progress Meetings