**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.

|  |  |  |
| --- | --- | --- |
| Built Environment Term Service Contract |  | 4661 |
| Date of Original Agreement | |
|  | 13 Dec 2022 |

TASK ORDER DETAILS:

1. the *Employer*

Intellectual Property Office

2. the

*Consultant*

Perfect Circle JV Ltd

of whose registered office is

Address for communications

Concept House, Cardiff Road, Newport,

South Wales,

NP10 8QQ

Address for communications

Halford House Charles Street Leicester

LE1 1HA

Telephone

Address for electronic communications

The Lead Partner for this Task Order is:

01633 811411

[Phil.Evans@ipo.org](mailto:Evans@ipo.org)

Pick Everard

Telephone

Address for electronic communications

07393 012573 [lucystephens@pickeverard.co.uk](mailto:lucystephens@pickeverard.co.uk)

Task Order Title Task Order No.

Climate Change Risk Assessment

4661-006



**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 Time Charges** X

**The offered total of the Prices is: £**

29,728.33

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

29/01/2024

28/06/2024

**Task Description**

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

Conduct a comprehensive Climate Change Risk Assessment (CCRA) as described in the attached

Task Order.

**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**

|  |  |  |
| --- | --- | --- |
| 001 | Delivery Programme |  |
| 002 | Scope of Services |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

[*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 )

Intellectual Property Office

)

)

…………………………

by

Authorised Signatory

Ben McGirr

9/2/2024

………………

…………………………………………

Full name

…C…at…eg…or…y …M…an…ag…e…r ………………

Position/title

Executed for and on behalf of ) **Perfect Circle JV Ltd** ) by

)

…………………………

Authorised Signatory

Alastair Hamilton

………………

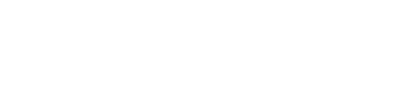
7/2/2024

…………………………………………

Full name

…D…ire…ct…or………………………………

Position/title



|  |
| --- |
| Service Request Proposal |
| Further to recent discussions, please f ind below a Service Request as def ined in the Framework Agreement made between Scape Procure Limited and Perf ect Circle JV Ltd dated 29th January 2021.  This Service Request Proposal is f ormed of 4 parts:  Part A: Outline Service Requirements, which captures your service needs and desired approach,  Part B: Pre-Engagement Activity Checklist, identif ying any activities required to enable our proposal and price to be presented,  Part C: Detailed Service Requirements, identif ying your key value drivers, inc. Social Value and measures of Vf M captured within our comprehensive service delivery proposal,  Part D: Statement of Key Outputs, setting out the deliverables f rom 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.  Perf ect Circle is a company jointly owned by Pick Everard, Gleeds and AECOM. Our of f er is unique in f ramework experience, with an unrivalled record of teams providing excellence through collaboration. We deliver with an extensive national supply chain f ormed of SMEs, micro businesses and larger consultancies, ensuring we provide perf ormance managed services through local businesses. Forming an integrated team across Perf ect Circle and our approved suppliers allows the broadest project scope to be of f ered with value f or money through one simple and ef f ective contract, providing maximum ef f iciencies and contributions to economic, environmental and social benef its to achieve the greatest levels of social value. |
|
|
|
|
| Part A - Outline Service Requirements |
| Client Name Intellectual Property Of f ice  Commission No. 4661-006 Commission Name (Title) Climate Change Risk Assessment  Commission Description Conduct a comprehensive Climate Change Risk Assessment Commission Postcode NP10 8YJ (CCRA)  Client Contact Name 0 Client Contact Email 0  Client Contact Position Client Contact Telephone Number 0  Lead Partner - Company Name Pick Everard Commission Lead Contact Name Lucy Stephens  Commission Lead Contact Email [lucystephens@pickeverard.co.uk](mailto:lucystephens@pickeverard.co.uk) Commission Lead Contact Mobile 07393 012573  Region South Wales  Main Contract Type Option G (NEC3 Prof essional Services Contract) - Task Order Lead Partner’s Service Manager (or Alex Dovey  NEC3 PM)  Procurement Method Time Charge Client anticipated end date 03 May 2024 |
| Client estimated budget f or Commission 29,728.33  £  Client anticipated start date 29 Jan 2024  Has a Client’s draf t/outline programme No been appended?  Other Document Upload 1  Other Document Upload 2  Other Document Upload 3  Has a Client’s Project Brief been No appended?  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

1.2 Objectives/Outcomes

2.0 Health, Welf are, Saf ety, Environment and Sustainability Considerations

3.0 Value f or Money Statement

IPO require a Climate Change Risk assessment to comply with Greening Government Commitments.

- Responds to the requirements of the Greening Government Commitments (GGC) in its preparation;

- Is a proportionate, but (at the same time) industry leading assessment, which sets the bar f or other Government departments;

- Takes into account the intelligence f rom, and voices of , a range of interested parties (both internal and external to IPO), to help understand interdependencies;

- Expresses the potential climate risk impact range across a clear and well-def ined index;

- Links to existing and planned IPO policy, strategy and action plans;

- Incorporates examples and case studies of previous good practice;

- Contextualises f uture inf luential systems e.g. local development sites e.g. St Modwen; the adjacent Tredegar House lake; engagements with Newport Transport (regarding potential new public transportation links);

- Recognises that IPO may not have the ability to directly inf luence some climate risks, but that partnership working may be required to adapt;

- Includes mitigative, proactive and other actions (adaptive capacities);

- Outputs that can materially and positively inf luence ISO14001 signif icant impacts and ef f ects, where appropriate.

As IPO is a government body any inf ormation relating to the building is to be treated sensitively.

Whilst the majority of the work will be desk based assessment if surveys are required of the site, it is noted that it is a live site.

Pick Everard will continue to review Health, welf are, saf ety, Environment and Sustainability considerations through out the project lif ecycle. Parking will be provided on site f or surveys and visits.

The client is keen to undertake this as quickly as possible and known trusted supply chain.

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 f or Money Driver (1) Value f or Money Driver (2) Value f or Money Driver (3)

1) Speed of appointment and delivery

2) Access to specialist / local supply chains

4.0 Project Success Criteria

5.0 Social Value

In addition to the Value Drivers identif ied in section 3.0 above, we also monitor the f ollowing Perf ormance Indicators as standard f or each commission:

• Time Predictability

• Cost Predictability

• Local Spend – Percentage of total spend within 20 miles of Client of f ice/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 Satisf action

• Supply Chain Satisf action

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 30 days of receipt of invoices - our target is 100% of our invoices to be paid within 30 days

Is the Client interested in setting TOMS No targets?

TOMS Outcome No

Having discussed with the client whether they wish us to augment our Social Value of f ering by setting up to 5 additional metrics against the National Data Set of TOMs

(Themes, Opportunities, Measures), we conf irm 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 Proxy Value | 0.91 | Target (1) 13,377.75 | SV Add £ 12,173.75 (1) |
| NT Ref (2) | NT19 - Total amount (£) spent through contract with LOCAL micro, small and medium enterprises (MSMEs) | Comments (2) | Unit | £ | SV Proxy Value | 0.91 | Target (2) 0.00 | SV Add £ 0.00 (2) |
| NT Ref (3) | NT61 - Fair Payment - Percentage of invoices on the contract paid within 30 days | Comments (3) | Unit | % | SV Proxy Value | 0.00 | Target (3) 0 | SV Add £ 0.00 (3) |
| NT Ref (4) |  | Comments (4) | Unit |  | SV Proxy Value |  | Target (4) | SV Add £ 0.00 (4) |
| NT Ref (5) |  | Comments (5) | Unit |  | SV Proxy Value |  | Target (5) | SV Add £ 0.00 (5) |
| NT Ref (6) |  | Comments (6) | Unit |  | SV Proxy Value |  | Target (6) | SV Add £ 0.00 (6) |
| NT Ref (7) |  | Comments (7) | Unit |  | SV Proxy Value |  | Target (7) | SV Add £ 0.00 (7) |
| NT Ref (8) |  | Comments (8) | Unit |  | SV Proxy Value |  | Target (8) | SV Add £ 0.00 (8) |
|  |  |  |  |  |  |  |  | SV (£) 12,173.75  Total |

6.0 Detailed Scope of Services

6.1 Description of the Services to be

Provided

6.2 Service / Price Exclusions

The Scope of works includes:

- Project Inception meeting,

- Detailed review and summary of existing documents,

- IPO and stakeholder workshop,

-CCRA: Screening assessment,

-CCRA: Past and Future Climate Data Management,

-CCRA: Impact Assessment,

-Presentation workshop on results f rom study,

- Final CCRA report.

It is understood the CCRA requires input f rom a Nature Recover Plan and a Intrusive Fabric survey. These worse are excluded f rom this Services Agreement.

6.3 Key Stakeholders, Consultations and IPO Head of Estates and Projects,

Interdependencies

Environmental Manager, IPO stakeholders.

6.4 Summary of Services at Each Project Stage

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

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Prime Core - | RIBAStages (✔ ) |  | 0-1\* |  | 2 |  | 3 |  | 4 |  | 5 |  | 6 |  | 7 |  | Procurement Route |
| Project  Management | Pick Everard |  | Yes |  | No |  | No |  | No |  | No |  | No |  | No |  | SFR |
| Quantity  Surveying | Pick Everard |  | Yes |  | No |  | No |  | No |  | No |  | No |  | No |  | SFR |

Core - RIBAStages (✔ )

|  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Building  Surveying |  | No | No | No | No | No | No | No |  |
| Architectural  Design |  | No | No | No | No | No | No | No |
| Mechanical  Engineering | McCann & Partners Ltd | Yes | No | No | No | No | No | No | SFR |
| 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

Non C ore

Service

Non C ore

Supplier

0-1 2 3 4 5 6 7 Non C ore P rocurement Route

Sustainability P ick Everard Yes No No No No No No SFR

\* use RIBA stages 0-1 for non-construction projects where only time charges are applicable

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 f or Perf ect Circle to engage Client Proposed Organisations you are acknowledging in approving this Service Request that;

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

You are aware that the f ees of the proposed organisation(s) are not in line with the Framework Agreement but nonetheless you are content that these of f er value f or money.

You have undertaken your own technical, commercial, and legal due diligence f or 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 Pref erred Partner(s). Sole appointment of a Client Proposed

Organisation shall not be permitted unless otherwise agreed by Scape.

Perf ect 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 Perf ect 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 Perf ect Circle may ref use to appoint that organisation.

6.5 Sub-consultant Selection and

Competitive Tender Award Criteria

6.6 Appointment of Principal Designer

7.0 Delivery Team

Delivery Team - document upload

McCanns & Partners have been selected by both Perf ect Circle and the client to undertake their services on this project, using Scape Framework Rates.

The role of Principal Designer is not required on this scheme. Lucy Stephens - Pick Everard Project Manager

Tim Danson - Pick Everard Director; Sustainability & Energy

Chris Morgan - McCanns MEP Surveyor

8.0 Delivery Programme

Our proposed delivery programme is as f ollows:

Would you like to upload your own

Project Programme

Project Programme - Document Upload

(1)

Project Programme - Document Upload

(2)

Project Programme Comments

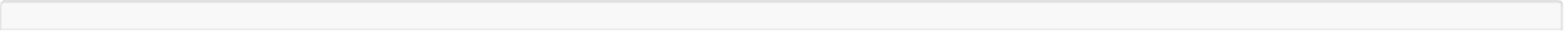
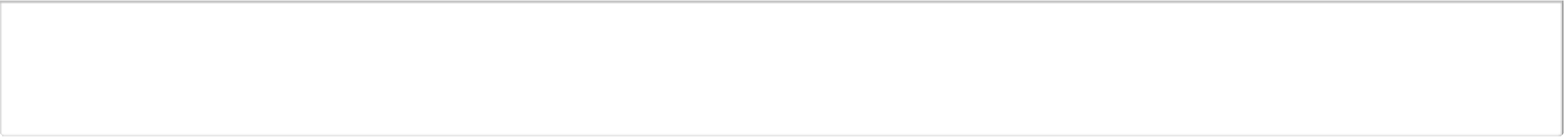
Yes

IPO CCRA Delivery Programme.PNG (60 KB)

Delivery Programme

There are no records to display.

9.0 Schedule of Deliverables



10.0 Design Specif ications and

Technical/Quality/Regulatory Standards

11.0 BIM Requirements and Document

Control

12.0 Client Acceptance Criteria

13.0 Risks and Opportunities

14.0 Prerequisites, assumptions and constraints

15.0 Requirements f or Surveys, Investigations and Third-Party Historic Data

Project Inception Meeting : W/C 5th February 2024

Detailed review and summary of Existing Data: 5th - 16th February 2024

IPO and Stakeholder Workshops: 5th February - 1st March 2024

CCRA Screening Assessment: 26th February - 8th March 2024

CCRA: Climate data acquisition, presentation and analysis: 19th February - 15th March 2024

CCRA: Impact Assessment: 11th March - 29th March 2024

IPO Presentation; 8th April 2024

Finalise and Issue IPO'S CCRA Report; 8th April - 27th April 2024

The report will be compliant with Greening Government Commitment's.

Standard BIM applies. Documents are controlled under the Pick Everard Business Management System. Completed CCRA covering all aspects of the building.

- As built inf ormation not available,

- Delayed responses f rom external bodies,

- Additional Surveys required.

The availability of as built inf ormation on the buildings to be made available by the client.

The client takeaways can occur as per the dates proposed to ensure programme can be achieved.

A Nature Recovery Plan and a Intrusive Fabric Survey Plan will be required to f eed in to the CCRA.

16.1 Overview Fee

Our total fee is summarised as follows

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

B - Charges f or Core Services RIBA Workstages 2-7 £ C - Time Charges £

D - Sub Total: Charges f or 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 £

0.00

28,151.83

28,151.83

0.00

28,151.83

1,576.50

29,728.33

0.00

29,728.33

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 Deeds of Variation since.

Please note that the People Rates are adjusted annually for inflation on the 5th January in accordance with the Indexation Table contained within the 'Agreement'. This is based on the BCIS Labour Cost Index published by the Building Cost Information of the Royal Institute of Chartered Surveyors.

If the Client has elected to include Secondary Option X1 (Price Adjustment for Inflation) in the NEC Delivery Agreement that is executed to progress this Service Request, then those Prices derived from People Rates (identified as ‘Time Charges above) will be subject to adjustment in line with the same inflation indexation provisions of the Framework. Your budget should therefore include an allowance for inflation on these Prices.

Alternatively, if the Client has elected not to include Secondary Option X1 in the NEC Delivery Agreement, then an allowance for the risk of inflation will have been incorporated into the above ‘Time Charges’.

In both the above scenarios, any quotations for compensation events that arise in the future will apply the latest People Rates.

If percentage ‘Charges’ for Prime Core or Core Services apply, then the Construction Cost Estimate will be reviewed at the end of each RIBA Stage or annually (whichever is the shorter) and should this change (upwards or downwards), the ‘Charges’ for those RIBA stages yet to be undertaken will be re-calculated accordingly. Any change in the Prices will as a consequence be recognised through a compensation event due to the change in Scope.

Our Services are broken down across the RIBA Stages as f ollows:

Service % Charges

Project Manager Quantity

Architect Building

Electrical

Mechanical

Structural

Total Fee

Surveyor

Surveyor

Engineer

Engineer

Engineer

2

3

4

5

6

7

Sub Total

0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00

0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00

0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00

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0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00

0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00

Time Charges

Project

Quantity

Architect Building

Electrical

Mechanical

Structural

Commercial

Non Core Total Fee

Manager

Surveyor

Surveyor

Engineer

Engineer

Engineer

Surveyor

0

1

2

3

4

5

6

7

Sub

Total

1,460.80 2,300.54 0.00 0.00 0.00 1,993.27 0.00 0.00 22,397.22 28,151.83

0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00

0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00

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0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00

1,460.80 2,300.54 0.00 0.00 0.00 1,993.27 0.00 0.00 22,397.22 28,151.83

Total Charges

Project

Quantity

Architect Building

Electrical

Mechanical

Structural

Commercial

Non Core Total Fee

Manager

Surveyor

Surveyor

Engineer

Engineer

Engineer

Surveyor

0

1

2

3

4

5

6

7

Totals

1,460.80 2,300.54 0.00 0.00 0.00 1,993.27 0.00 0.00 22,397.22 28,151.83

|  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| 1,460.80 | 2,300.54 | 0.00 | 0.00 | 0.00 | 1,993.27 | 0.00 | 0.00 | 22,397.22 | 28,151.83 |

Escalators

Project

Quantity

Architect Building Electrical Mechanical Structural

Commercial

Non Core Total Fee

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Contract 0.00 0.00 0.00 0.00 |  | 0.00 | 0.00 0.00 0.00 | 0.00 |
| Lead |  |  |  |  |
| Supervisor 0.00 0.00 0.00 0.00 |  | 0.00 0.00 0.00 0.00 0.00 | | |

Manager

Surveyor

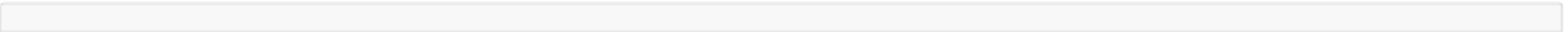
Engineer

Surveyor

0.00

0.00

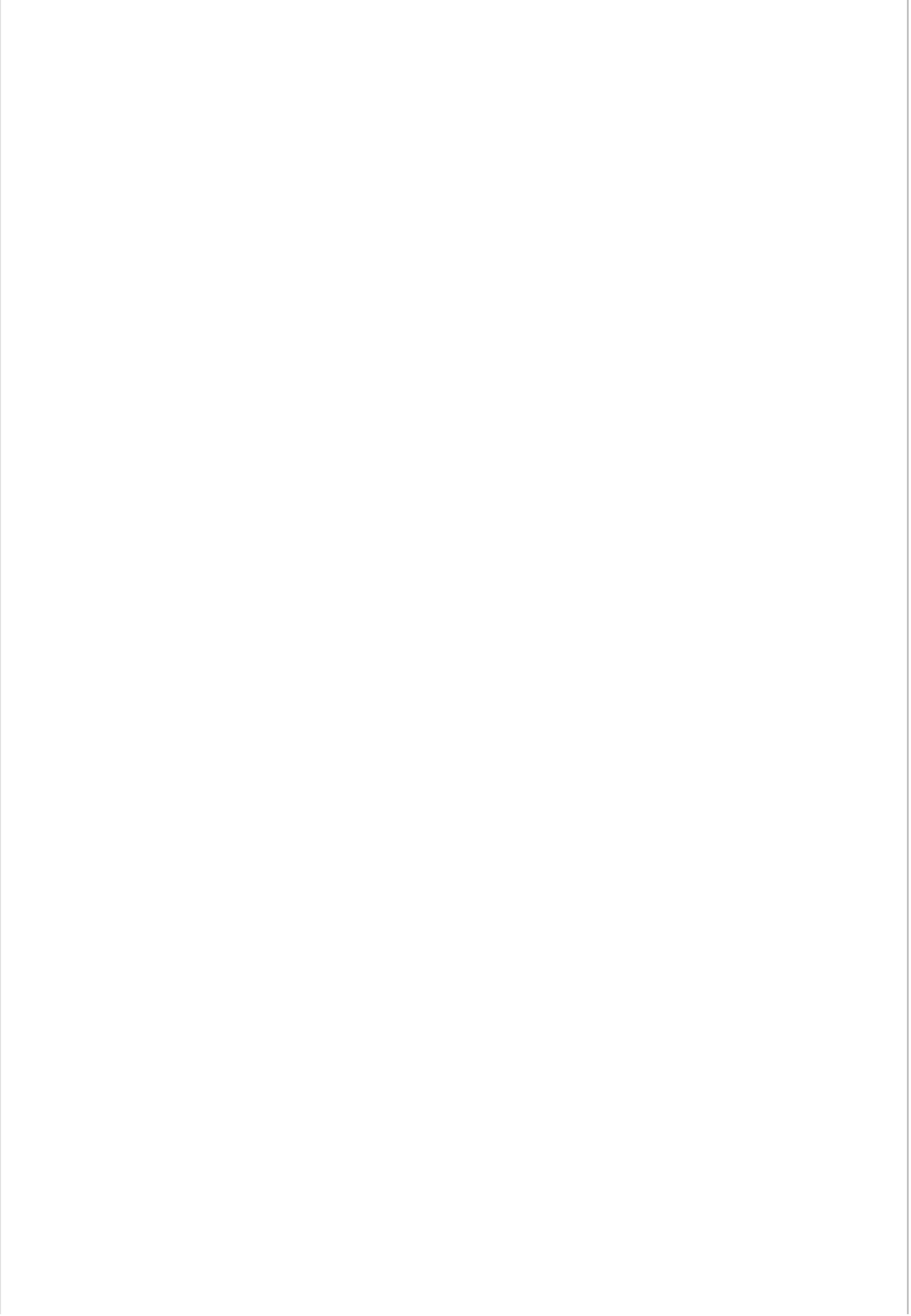
Disbursements



There are no records to display.



|  |
| --- |
| 16.2 Time Charge Schedule |
| The calculation of time charge f ees is based on an hourly rate by grade and the number of hours allocated. As may be appropriate, in the description f or each line we have provided a description as to how these two variables have been used.  Time Charges  Discipline Supplier If Non- RIBA Enter Task Details Staff Grade Estimated Hourly Total Fee £ C ore, Stage Duration in Rate (ex  please Hours V A T) £  state  Service |
|
|
|
|
|
|
| Mechanical McC ann & 0 Support to IP O C C RA meetings and information Senior C onsultant or 10 36.50 54.61 1,993.27  Engineer P artners gathering - 15yrs experience |
| Ltd |
| Non-C ore P ick Sustainabili 0 P roject inception meeting, virtual Director/P artner 1.00 116.19 116.19 |
| Everard |
| Non-C ore P ick Sustainabili 0 P roject Inception meeting Senior C onsultant or 10 2.00 92.96 185.92  Everard - 15yrs experience |



|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Non-C ore | P ick  Everard | Detailed review and summary of existing documents | 0 | Detailed review and summary of existing doucments | Director/P artner | 1.00 | 116.19 | 116.19 |
| Non-C ore | P ick  Everard | Sustainabili | 0 | Detailed review and summary of existing documents | Senior C onsultant or 10  - 15yrs experience | 6.00 | 92.96 | 557.76 |
| Non-C ore | P ick  Everard | Sustainabili | 0 | Detailed review and summary of existing documents | Graduate - Degree qualified and < 5yrs experience | 10.00 | 40.67 | 406.70 |
| Non-C ore | P ick | Sustainabili | 0 | 4no. IP O and stakeholder workshops | Director/P artner | 8.00 | 116.19 | 929.52 |
|  | Everard |  |  |  |  |  |  |  |
| Non-C ore | P ick  Everard | Sustainabili | 0 | 4no. IP O and stakeholder workshops | Senior C onsultant or 10  - 15yrs experience | 8.00 | 92.96 | 743.68 |
| Non-C ore | P ick  Everard | Sustainabili | 0 | 4no. IP O and stakeholder workshops | Graduate - Degree qualified and < 5yrs experience | 16.00 | 40.67 | 650.72 |
| Non-C ore | P ick | Sustainabili | 0 | C C RA : Screening A ssessment | Director/P artner | 2.00 | 116.19 | 232.38 |
|  | Everard |  |  |  |  |  |  |  |
| Non-C ore | P ick  Everard | Sustainabili | 0 | C C RA : Screening A ssessment | Senior C onsultant or 10  - 15yrs experience | 16.00 | 92.96 | 1,487.36 |
| Non-C ore | P ick  Everard | Sustainabili | 0 | C C RA : Screening A ssessment | C onsultant or 5 - 10yrs experience | 8.00 | 73.04 | 584.32 |
| Non-C ore | P ick  Everard | Sustinabilit | 0 | C C RA : Screening A ssessment | Graduate - Degree qualified and < 5yrs experience | 12.00 | 40.67 | 488.04 |
| Non-C ore | P ick | Sustainabili | 0 | C C RA : P ast and Future C limate Data Management | Director/P artner | 2.00 | 116.19 | 232.38 |
|  | Everard |  |  |  |  |  |  |  |
| Non-C ore | P ick  Everard | Sustinabilit | 0 | C C RA : P ast and Future C limate Data Management | Senior C onsultant or 10  - 15yrs experience | 16.00 | 92.96 | 1,487.36 |
| Non-C ore | P ick  Everard | Sustainabili | 0 | C C RA : P ast and Future C limate Data Management | C onsultant or 5 - 10yrs experience | 16.00 | 73.04 | 1,168.64 |
| Non-C ore | P ick  Everard | Sustainabili | 0 | C C RA : P ast and Future C limate Data Management | Technician - no qualification and < 5yrs experience | 8.00 | 40.67 | 325.36 |
| Non-C ore | P ick | Sustainabili | 0 | C C RA : Impact assessment | Director/P artner | 3.00 | 116.19 | 348.57 |
|  | Everard |  |  |  |  |  |  |  |
| Non-C ore | P ick | Sustainabili | 0 | C C RA : Impact assessment | A ssociate/P rincipal | 3.00 | 104.57 | 313.71 |
|  | Everard |  |  |  | C onsultant or 15yrs +  experience |  |  |  |
| Non-C ore | P ick  Everard | Sustinabilit | 0 | C C RA : Impact assessment | Senior C onsultant or 10  - 15yrs experience | 30.00 | 92.96 | 2,788.80 |
| Non-C ore | P ick  Everard | Sustinabilit | 0 | C C RA : Impact assessment | C onsultant or 5 - 10yrs experience | 15.00 | 73.04 | 1,095.60 |
| Non-C ore | P ick  Everard | Sustainabili | 0 | C C RA : Impact assessment | Graduate - Degree qualified and < 5yrs experience | 30.00 | 40.67 | 1,220.10 |
| Non-C ore | P ick | Sustinabilit | 0 | Draft report preparation | Director/P artner | 4.00 | 116.19 | 464.76 |
|  | Everard |  |  |  |  |  |  |  |
| Non-C ore | P ick | Sustinabilit | 0 | Draft report preparation | A ssociate/P rincipal | 2.00 | 104.57 | 209.14 |
|  | Everard |  |  |  | C onsultant or 15yrs +  experience |  |  |  |
| Non-C ore | P ick  Everard | Sustainabili | 0 | Draft report preparation | Senior C onsultant or 10  - 15yrs experience | 16.00 | 92.96 | 1,487.36 |
| Non-C ore | P ick  Everard | Sustainabili | 0 | Draft report preparation | C onsultant or 5 - 10yrs experience | 15.00 | 73.04 | 1,095.60 |
| Non-C ore | P ick  Everard | Sustainabili | 0 | Draft report preparation | Graduate - Degree qualified and < 5yrs experience | 23.00 | 40.67 | 935.41 |
| Non-C ore | P ick | sustainabili | 0 | IP O P resentation | Director/P artner | 3.00 | 116.19 | 348.57 |
|  | Everard |  |  |  |  |  |  |  |
| Non-C ore | P ick  Everard | Sustainabili | 0 | IP O P resentation | Senior C onsultant or 10  - 15yrs experience | 8.00 | 92.96 | 743.68 |
| Non-C ore | P ick  Everard | Sustainabili | 0 | IP O P resentation | Graduate - Degree qualified and < 5yrs experience | 8.00 | 40.67 | 325.36 |
| Non-C ore | P ick | Sustainabili | 0 | Finalise and issue the C C RA report | Director/P artner | 4.00 | 116.19 | 464.76 |
|  | Everard |  |  |  |  |  |  |  |
| Non-C ore | P ick  Everard | Sustainabili | 0 | Finalise and issue the C C RA report | Senior C onsultant or 10  - 15yrs experience | 4.00 | 92.96 | 371.84 |
| Non-C ore | P ick  Everard | Sustainabili | 0 | Finalise and issue the C C RA report | C onsultant or 5 - 10yrs experience | 2.00 | 73.04 | 146.08 |
| Non-C ore | P ick  Everard | Sustainabili | 0 | Finalise and issue the C C RA report | Graduate - Degree qualified and < 5yrs experience | 8.00 | 40.67 | 325.36 |
| P roject  Manager | P ick  Everard |  | 0 | P roject Inception Meeting | C onsultant or 5 - 10yrs experience | 1.00 | 73.04 | 73.04 |
| P roject  Manager | P ick  Everard |  | 0 | Detailed review and summary of existing documents | C onsultant or 5 - 10yrs experience | 1.00 | 73.04 | 73.04 |
| P roject  Manager | P ick  Everard |  | 0 | 4no. IP O and stakeholder workshops | C onsultant or 5 - 10yrs experience | 8.00 | 73.04 | 584.32 |
| P roject  Manager | P ick  Everard |  | 0 | C C RA : Screening A ssessment | C onsultant or 5 - 10yrs experience | 2.00 | 73.04 | 146.08 |
| P roject  Manager | P ick  Everard |  | 0 | C C RA : Impact assessment | C onsultant or 5 - 10yrs experience | 1.00 | 73.04 | 73.04 |
| P roject  Manager | P ick  Everard |  | 0 | Draft report preparation | C onsultant or 5 - 10yrs experience | 2.00 | 73.04 | 146.08 |
| P roject  Manager | P ick  Everard |  | 0 | IP O P resentation | C onsultant or 5 - 10yrs experience | 3.00 | 73.04 | 219.12 |
| P roject  Manager | P ick  Everard |  | 0 | Finalise and issue the C C RA report | C onsultant or 5 - 10yrs experience | 2.00 | 73.04 | 146.08 |
| Q uantity | P ick |  | 0 | P roject inception meeting, virtual | A ssociate/P rincipal | 1.00 | 104.57 | 104.57 |
| Surveyor | Everard |  |  |  | C onsultant or 15yrs +  experience |  |  |  |
| Q uantity  Surveyor | P ick  Everard |  | 0 | Detailed review and summary of existing documents | A ssociate/P rincipal C onsultant or 15yrs + experience | 1.00 | 104.57 | 104.57 |

Q uantity

Surveyor



P ick

Everard



0 Draft report preparation A ssociate/P rincipal C onsultant or 15yrs + experience

5.00 104.57 522.85

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| Q uantity  Surveyor | P ick  Everard | 0 | IP O P resentation | A ssociate/P rincipal C onsultant or 15yrs + experience | 1.00 | 104.57 | 104.57 |
| Q uantity | P ick | 0 | Finalise and issue the C C RA report | A ssociate/P rincipal | 2.00 | 104.57 | 209.14 |
| Surveyor | Everard |  |  | C onsultant or 15yrs +  experience |  |  |  |
| Q uantity | P ick | 0 | C C RA Impact A ssessment | A ssociate/P rincipal | 12.00 | 104.57 | 1,254.84 |
| Surveyor | Everard |  |  | C onsultant or 15yrs +  experience |  |  |  |
| 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 Prof essional Service Contract Model. Option G (NEC3 Prof essional Services Contract) - Task Order  A description of the contracting options available to you can be f ound in Appendix B. We are proposing that this appointment is placed using the f ollowing: | | | | | | | |
|
|
|
| Appendix A | | | | | | | |

Scope of Services Lot 1

4661-006 IPO CCRA Survey Scope of services.docx (22 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 Service Short Contract (PSSC) - Short Service Delivery Agreement

2:NEC4 Professional Service Contract (PSC) Option A - Priced Contract with Activity Schedule

3:NEC4 Professional Service Contract (PSC) Option C - Target Contract

4:NEC3 Professional Services 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 Service 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 Service 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 Service 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 Services 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.

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.

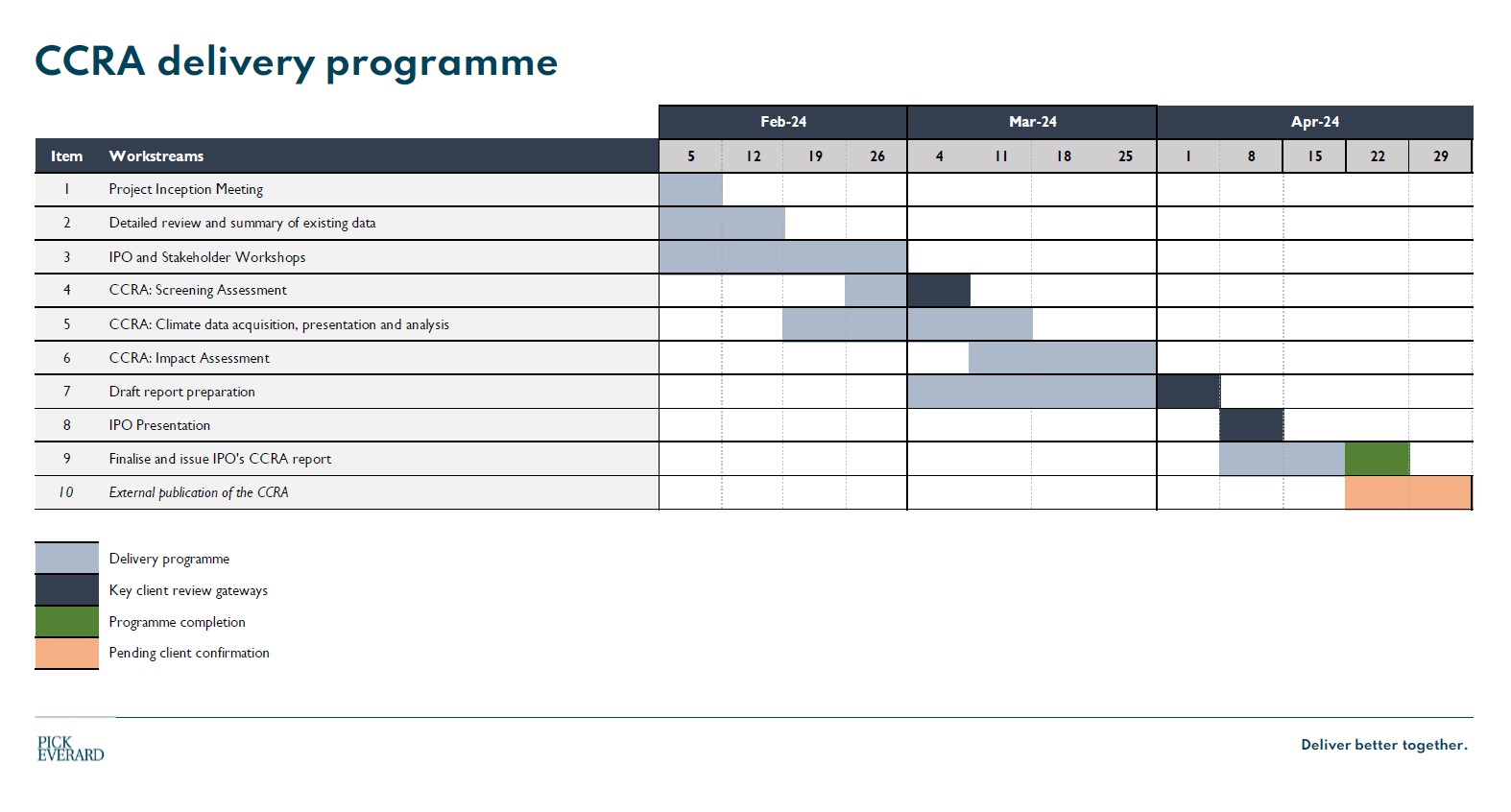
· An activity schedule, Price List or task schedule, as appropriate to the proposed form of contract and the pricing processes of the Agreement.

· 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)



Intellectual Property Office – Climate Change Risk Assessment

Scope of Services

17.01.2024

**Pick Everard – Sustainability Team**

**Project Inception Meeting**

We would welcome the chance to prepare for and host a 1-hour project inception meeting with IPO. The meeting would be virtual and allow us to introduce the key members of our team.

We would work through the methodology proposed, establish any changes required, plan key dates in the diary, and programme in regular meetings (once every two weeks) for formal progress updates with IPO. We can also answer any other questions you have.

**Detailed review and summary of existing documents**

We will conduct a deep and thorough review of existing Pick Everard and other IPO survey and documents, in combination with the information acquired during our initial engagement on 14 December.

This will allow us to prepare a comprehensive list of ‘systems’ that IPO owns and operates, and (where possible) their current condition. For clarity, we will allocate these systems within the following categories:

 Building assets

 Infrastructural assets

 Technologies

 Resources and/or products

 IPO staff and visitors

 Ecosystems, habitats and/or species (including their environmental functions)

 IPO services and operations (impacts on customers)

 Value chain / partner services

 Organisational relationships (interdependencies)

We will also set out forthcoming IPO policy, strategy and action plan documents that the CCRA will need to be cognisant of and integrate with, either as the CCRA is prepared and published, or for future editions.

**IPO and stakeholder workshops**

Once our documentation review is complete, and we have prepared an initial summary of our findings, we will conduct 4no. 1-hour workshops to acquire deeper insight into IPO’s

‘systems’ that have the potential to be adversely affected by a changing climate. We currently plan to host these sessions in a virtual environment (via Teams) to maximise attendance and the use of interactive data collection mechanisms such as Mentimeter. Where we cannot secure attendance from external parties, we will issue a concise but comprehensive email survey. We recommend holding the following workshops to gain a deeper understanding of IPO’s:

1) services and day to day operations, and any previously adopted controls and measures

(case studies) to increase resilience and/or adaptability to climate risks (IPO only);

2) key suppliers and value chain partners (IPO and specially selected members of IPO supply chain);

3) corporate neighbours within the site (IPO and representatives from business e.g. Tredegar House, Wafer Fab, other).

4) wider organisational interdependencies e.g. emergency services, highway authorities, grid electricity, gas network, water and wastewater providers, telecoms and ITC - as appropriate (IPO and specially selected members of IPO functional service community)

As an overlay to the findings of these workshops, we’d welcome an insight or expectations

from KPMG (in its auditing role), acquired either as part of a 1-2-1 session or via email.

We’ll summarise, in a technical note, our initial findings up to this stage, and issue this for IPO review and approval; this will ensure our foundation for the subsequent CCRA is accurate and complete. Based on these findings, we will prepare an initial screening assessment for the physical risks to IPO and its systems.

**CCRA: screening assessment**

With a robust and detailed foundation of information on IPO’s assets and operations, our

PEV team will conduct a high-level review of physical climate risks to identified systems.

In accordance with ISO14091 requirements, the screening assessment will consider the *current* level of risk posed by climatic events, in the absence of any additional mitigation or actions (adaptive measures). The results will be tabulated (example below) and form the basis for the more detailed impact chain analysis (Stage 6).

We will share our initial screening assessment with IPO for review and approval.

**CCRA: past and future climate data management**

Once the background data collection and screening assessment are complete, PEV will be in an ideal position to understand the breadth of climate data we need to collect and utilise. At this time, we expect this to include:

Past events Desk based research into past regional climate events, in combination with locally verified accounts of incidents.

Future trends In accordance with best practice, Met Office forecast data across the medium (6.0) and high (8.5) representative concentration pathways (RCP), for rainfall - snowfall - temperature - humidity - wind - sea level, will be collated. Data will be presented for the current day (baseline), 2030s and 2080s, for the 25km2 region that hosts Concept House site.

CIBSE weather files for ambient temperature, solar global radiation and wind speed will also be incorporated into the assessment. Data will be presented (and / or amalgamated with Met Office data) for the current day (baseline) and for +2oC and +4oC scenarios in 2080. CIBSE weather data sets will be used in particular to evaluate the potential for future building performance (particularly in terms of HVAC performance and strategies) related to energy, services capacity and occupant comfort.

Our specialist team will set out the findings of the climate data acquisition process by climate hazard (rainfall, temperature, sea rise, snowfall etc), with each section sub-divided into ‘past events’ and ‘future trends’.

**CCRA: impact assessment**

By Stage 6, the PEV team will have an extensive and evidenced appreciation of:

 IPO’s various systems;

 its value chain and interdependencies;

 current system risks from climatic events;

 past and future climatic conditions and trends in the Newport region.

It is at this point in the delivery process that we will conduct a detailed risk and impact analysis for IPO. Our analyses will be presented in a detailed report and accompanying tables that describe:

(1) The impact of different climate hazards on all systems, setting out their respective level of exposure and sensitivities using a simple Likert Scale (high-medium-low, for example) (tabulated)

(2) Impact chain visualisations, as shown adjacent

(3) An interdependency visualisation.

**CCRA: impact assessment (continued)**

To accompany the impact assessment, our Cost Consultant will quantify and (where required) qualify the potential financial impact of up to the top five climate risks to IPO systems. This will include a likely worst-case evaluation of (*inter alia*, and as appropriate) the capital costs associated with, for example:

 Repairs, upgrades and/or replacement of materials, products and/or technologies, including contractor service provision;

 Loss of service (lost employee time, disruption to operations, additional time for new staff); and

 Reputational damage as a result of service disruption or failure.

The findings of this part of the assessment will be included as a separate chapter within the report, detailing the methodology used to work up results (including assumptions made) and the potential capital cost impacts associated with specific climate risk events.

**Draft report preparation**

Once the risk assessment is complete, our team will draft an initial report for IPO, which will include (as appropriate) the contents shown adjacent. The main body of the assessment will clearly establish mitigation and/or proactive measures to respond to the most

significant climate risks identified. These actions will be incorporated in a single, tabulated plan, and will be aligned to IPO’s adaptive capacity across ‘organisational, technical, financial, ecosystem’ functions.

We will issue for review our draft report, in advance of a two-hour presentation and discussion session (Stage 8). Early sight of the draft report will give IPO the opportunity to engage deeply with the content and bring questions and queries to the presentation workshop.

**IPO presentation workshop**

Prior to the issue of the final assessment report, we will prepare for and host a two-hour workshop at Concept House to:

 Review the main outputs of the report, including the key impact findings, top five potential cost risks, and our recommendations for mitigation and further action;

 Work through any gaps in data, limitations or opportunities for future analyses;

 Discuss further IPO’s adaptive capacity and plans;

 Answer any other questions or queries; and

 Discuss the opportunity to publish externally a suitable version of the CCRA.

Our current expectation is that this presentation workshop would be held with IPO only. However, should it be determined that having other stakeholders present would be valuable, we will agree this in advance with you.

**Finalise and issue IPO’s CCRA report**

Once the IPO team has reviewed the draft report, and attended and provided feedback in the presentation, we will prepare and issue the final CCRA report. The report will be accompanied by all data and appendix information, for IPO’s records and future work in this area.

We have currently resourced to prepare an assessment report in a Pick Everard format. This would not in any way inhibit the delivery of Stage 10 (external publication), should this later be progressed. The CCRA report will be issued as a pdf, in a highly polished and accessible format.

**External publication of the CCRA**

As discussed during our initial workshop on this commission, there may be a benefit to IPO presenting the CCRA (albeit, potentially in a simplified / condensed format) on its external webpages. The benefits would include:

 Demonstrating a best practice approach to other government organisations;

 Meet the objective of the Greening Government Commitment for Adapting to

Climate Change;

 Staff assurance;

 Proactive stakeholder engagement;

 Wider reputational benefit; and

 Greater attraction and engagement from IPO’s on-site neighbours.

If the CCRA is to be published externally, PEV would recommend that the content of the original report is condensed and simplified, that confidential e.g. cost / security data is removed, and IPO livery / imagery is used throughout.

We have currently priced separately our support for Stage 10, subject to further conversation with IPO and project progression

**McCanns & Partners**

MEP Consultant. McCanns & Partners will support Pick Everard in Information Gathering, share knowledge from previous involvement with IPO and attend workshops.

**Pick Everard**

Project Management. Working alongside Pick Everard Sustainability team & McCanns & Partners to coordinating the works and managing information flow and delivery of reports.