# Schedule of Services

The Services may be divided into separate stages but such division shall not affect the Consultant's obligation to provide the Standard Services as and when necessary in accordance with this Appointment.

Where there is a reference in this Schedule to assisting or providing Services in conjunction with the Other Consultants the Consultant shall assist and co-operate with the Other Consultants in the performance of the Services.

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| 1 | 1. Introduction
	1. The Services described in this Schedule are intended to articulate the specific requirements of the Council for the Project and should be read in accordance with the RIBA Plan of Work 2013.
	2. The Services may be divided into and instructed in separate stages and the Council also has the option exercisable at its sole discretion to award any Additional Services or Optional Services but any such division or exercise of any option shall not affect the Consultant’s obligation to provide the Standard Services as and when necessary in accordance with this Appointment.
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| 2 | 1. Council's Objectives
	1. The Council’s objectives for the Project are set out in the Brief and summarised below:
* To commission a design team to develop proposals which firstly demonstrate the most appropriate disposition of uses across the Carfax and Cattlemarket sites, and secondly by producing a more detailed design proposal at RIBA stage 2 ‘Concept Design’ for the Carfax site. In parallel, a strategy for improvements to the public realm and connectivity of the area.
	1. On completion, a successful project will have produced:
* a commercially viable mixed use development of office space with supporting residential and small scale retail uses, including private and public car parking, which meets commercial, public and private needs.
* public realm proposals which will improve the permeability of the area for pedestrians and cyclists and the links with the city centre and recognising the importance of the area around the Station as a gateway to the city.
* a sustainable development which will act as a catalyst for further future enhancement of the City’s economic, environmental and inclusive character.
* imaginative and welcoming proposals to improve the public realm with space to dwell and enjoy; with regard to the existing characteristics of Winchester
* an improved relationship between modes of transport and their impact on the local environment (a Background Report on Transport and accessibility will be provided)
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|  3 | 1. Minimum requirements
	1. Across the two sites owned by the Council the provisional development requirements which the Council believes could be accommodated between the two sites and which should be tested by the design team are:
* approximately 13,000 sq m (140,000 sq ft) office floor space divided into two or three buildings with facilities and floorplates suitable for flexible use or subdivision either for a single or multiple occupiers with self contained car parking requirements incorporated into the design.
* provision of between 5,300 sq m (57,000 sq ft) and 8,180 sq m (88,000 sq ft) of residential floor space with associated parking in accordance with Council’s Local Plan and Affordable Housing policies;
* approximately 465 sq m (5,000 sq ft) small scale retail floor space including restaurant/café uses the purpose of which is to provide convenience shopping and services to office workers, local residents and commuters.
	1. For the avoidance of doubt, the Council reserves the right to limit the Services performed under this Appointment to the Standard Services (as defined in section 4 below) or to award any Additional Services (as defined in section 5 below) and/or any Optional Services (as defined in section 8 below) to the Consultant in accordance with the clauses of the Appointment as the case may be.
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| 4 | 1. Standard Services
	1. The design team (Architect’s team, who will manage the project) will be responsible for procuring all design services required including the following (other than those listed in paragraph 4.2 below): The Standard Services to be provided therefore include the following activities for the Carfax Site (including project management):
		* + 1. Lead Designer
				2. Principal Designer;
				3. Architectural design;
				4. Landscape design;
				5. Civil and Structural Engineer
				6. M&E Engineer
				7. BIM Co-ordinator;
				8. BIM Information Manager;
				9. Master planning including strategic sustainable development advice;
				10. Urban Designer
				11. BREEAM Consultant
				12. Planning consultancy including townscape heritage and visual statement and relevant sustainability statement.
	2. The Council will directly appoint Transport consultants, quantity surveyors and cost consultants separately.
	3. It is envisaged that the Development will be taken forward in phases with the Council exercising the right at its sole discretion at the end of each Phase as to whether or not it wishes to instruct the Consultant in respect of the next phase:
* Phase 1: Disposition of uses across the Carfax and Cattlemarket sites, a strategy for improvements to the public realm, and a proposal for ‘Concept Design’ for the Carfax site (RIBA Stages 0 -2);
* Phase 2: Following agreement from the Council to proceed, the design team will be commissioned to develop the design to planning stage (RIBA Stage 3);
* Phase 3: Technical Design (RIBA Stage 4)
* Phase 4: Construction (RIBA Stage 5) - option to novate or retain depending on chosen route for procurement
* Phase 5: Handover and Close Out (RIBA Stage 6)
* Phase 6: In Use (RIBA Stage 7)
	1. The Consultant will initially be appointed to develop the following elements to RIBA Stage 2:
* Proposal for proposed disposition of use across the Carfax and Cattlemarket sites.
* Prepare a Public Realm Strategy for the Winchester Station Approach area.
* Concept Design at RIBA Stage 2 for the Carfax site
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| 5 | 1. Additional Services

Carfax Site* 1. The Client may instruct the Consultant to undertake Additional Services in relation to the Carfax Site as set out below. These may comprise ( at the sole discretion of the Council ) one or more of Stages 3 to 7 inclusive of the RIBA Stages as set out in paragraph 4.4 above.
* Prepare and submit a Planning Application for the Carfax Site based on the Consultant’s Design as agreed with the Council including all necessary drawings and details and such display boards as are necessary for public consultation;
* Preparation and management of a Building Information Model (BIM) model in accordance with the Employers Information Requirements (EIR)
* Arranging and preparing information for Pre-application discussions with the Local Planning Authority and with statutory consultees
* Submission of screening request to the Local Planning Authority and, if it is determined that the scheme is an EIA development, the submission of a scoping request to the Local Planning Authority
* Submission of a pre-application enquiry to the Local Planning Authority
* Participating in public consultation and stakeholder engagement activities
* Preparing and submitting an application for full planning permission, taking account of the results of consultations including any required statutory consultation and pre-application enquiry response and making such revisions as are necessary in agreement with the Client as a result of any such consultations including Environmental Statement covering all matters scoped in by the Local Planning Authority’s scoping opinion (if the scheme is EIA development), Planning Statement, Design & Access Statement, Heritage Statement, Landscape & Visual Impact Statement, Sustainability Statement, Viability Appraisal (if required) and any other plans, drawings and other information specified in the Local Planning Authority’s Local Requirements List and National Requirements List
* Negotiations with Planning Officers and the subsequent revising and submission of plans
* Attendance at Planning Committee and any accompanied member site visits
* Submission of details in order to comply with any conditions attached to Planning Consent
	1. Any instructions for Additional Services in respect of the Carfax Site will be made in accordance with the clauses of the Appointment.
	2. The Council has not yet determined the procurement strategy for this Project The engagement of the Consultant beyond RIBA Stage 2 ‘Concept Design’ will be subject to the Council’s decision-making processes. Options for subsequent RIBA stages after RIBA Stage 2 ‘Concept Design’ include:
* Traditional procurement, maintaining the services of the design team (in whole or part) though to and including RIBA Stage 7: In Use
* ‘Design and Build’ procurement, employing the design team through part of RIBA Stage 4: Technical Design to prepare a Design & Build Stage One Tender, then novating the Consultant to a Design and Build Contractor for completion of Stage 4 (procured through a two stage tendering process)
* ‘Design and Build’ procurement, employing the design team through RIBA Stage 4: Technical Design to prepare a Design & Build Stage One Tender, then employing the Consultant under a Council Design Advisor role.

Public Realm works* The Council may instruct the Consultant to develop public realm improvements across the Station Approach area. This is subject to the receipt of separate funding by the Council.
* Any instructions for Additional Services in respect of the public realm improvements shall be instructed following the process as set out in the clauses of the Appointment.
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| 6 | 1. Definition of Roles

Lead Designer Co-ordinating preparation of stage programme[s] for the design process.Co-ordinating design of all constructional elements, including work by consultants, specialists or suppliers and for health and safety matters in conjunction with the Health & Safety Advisor.Establishing the form and content of design outputs, their interfaces and a verification procedure.Communicating with the Council on significant design issues.Leading and co-ordination preparation of a Project Execution Plan, including work outstanding from previous stages.Advising on the need for and the scope of services by consultants, specialists, sub-contractors or suppliers.Monitoring the work of the Designers.Designers Preparing and maintaining for each stage a programme for performance of the Services, (including Lead Designer) including any Services not completed in a previous stage.Providing designs, specifications, advice and information concerning the design for which the designer is responsible (‘the Relevant Design’) with due regard to cost, functionality, build quality and impact, buildability, construction safety, operation and maintenance.Determining materials, elements and components, standards of workmanship, type of construction and performance in use for the Relevant Design.Preparing drawings, sketches, schedules, specifications, calculations and production and tender information for the Relevant Design as appropriate.Giving due regard to the guidelines contained in and shall not use any materials specified in the current publication *Good Practice in the Selection of Construction Materials 2011 (British Council for Offices Publication)* unless authorised by the Council in writing to specify products or materials generally known within the Designer’s profession at the time of specification to be deleterious or hazardous to health or safety or to affect the durability of construction works.(Where engaged to provide services during the construction stage other than any duties in connection with administration of the Building Contract), making the appropriate number of visits to the site for: * + - * inspection generally of the progress and quality of the Relevant Design as built;
			* approval of such elements of the works as may be specified to be to the reasonable satisfaction of the Designer;
			* obtaining information necessary for the issue of any notice, certificate or instruction by the administrator of the Building Contract.

Consultant as Designer’s services include siting, spatial arrangement, amenity and appearance of buildings and external works elements. Includes services as relevant to Landscape Architects or Interior Designers.Principal Designer as set out in the CDM Regulations 2015. |
| 7 | 1. RIBA Stages
	1. The following services are based on the RIBA Plan of Work 2013 Stages see: <https://www.architecture.com/files/ribaprofessionalservices/practice/ribaplanofwork2013overview.pdf> for updates.
	2. The Consultant is to provide Principal Designer services as required by the CDM Regulations 2015 throughout the duration of this Appointment.

Phase 1: RIBA Stages 0-2 up to Concept Design Disposition of uses across the Carfax and Cattlemarket sites, a strategy for improvements to the public realm, and a proposal for ‘Concept Design’ for the Carfax site (RIBA Stages 0 -2); * Accessibility Audit
* Visiting the Site and carrying out an initial appraisal.
* Assisting development of the Initial Brief including consideration of Project Objectives, Quality Objectives, Project Outcomes, Sustainability Aspirations, Project Budget and other parameters or constraints. Undertaking Feasibility Studies and review of Site Information.
* Undertaking development of Handover Strategy and Risk Assessments.
* Assembly of project team including contributions to the Design Responsibility Matrix, Information Exchanges and the Project Execution Plan.
* Preparing Concept Design for the Carfax Site including architectural, engineering, landscape and public realm proposals and outline specifications.
* Preparing analysis and proposals for the development of the Carfax.
* Preparing Public Realm Strategy for the Winchester Station Approach development area.
* Preparing strategy for the disposition of uses across the Carfax and Cattlemarket sites,
* Providing information for approximate estimate of Construction Cost for inclusion with Cost Information.
* Preparing Sustainability Strategy and reviewing and Risk Assessments.
* Contributing to completion of the Final Brief.
* Preparing Stage Report in accordance with agreed Information Exchanges and submitting to Council.
* Preparing Maintenance and Operational Strategy and Handover Strategy.
* Assisting with Third Party Consultations, updating of the Project Execution Plan, preparing of the Construction Strategy and Health and Safety Strategies.
* Compile, revise and edit Final Brief.

Phase 2: RIBA Stage 3 Developed Design Following agreement from the Council to proceed, the design team will be commissioned to develop the design to planning stage* Accessibility Audit
* Developing the approved Concept Design to show spatial arrangements, type of construction, materials and updated outline specifications in sufficient detail to co-ordinate the structural and building services design of the project.
* Services in connection with risk management
* Negotiations in connection with statutory approvals
* Services in connection with value engineering
* Developing the approved landscape and public realm Concept Design to sufficient detail for a Planning Application and for the Cost Consultant to prepare a Cost Plan.
* Preparing a Public Realm Strategy for the Winchester Station Approach development area.
* Preparing a strategy for the disposition of uses across the Carfax and Cattlemarket sites,
* Investigating effect of statutory standards and construction safety on Concept Design.
* Consulting statutory authorities.
* Providing information for estimate of Construction Cost.
* Preparing Stage Report in accordance with agreed Information Exchanges and submitting to Client.
* Reviewing the Project Execution Plan and Risk Assessments and the Sustainability, Maintenance and Operational, Handover, Construction and Health and Safety Strategies.
* Undertaking Third Party Consultations as required, including preparing presentations and exhibition material for stakeholder engagement and public consultation events.
* Present the developed design to Council and/or External design review prior to planning application.

Planning Application for the Carfax Site (Standard Service) * Arranging and preparing information for Pre-application discussions with the Local Planning Authority and with statutory consultees.
* Participating in pre-application consultation
* Participating in public consultation and stakeholder engagement activities
* Preparing and submitting application for detailed planning permission, taking account of the results of consultations including any required statutory consultation and making such revisions as are necessary as a result of any such consultations including Planning Statement and Townscape and Heritage Visual Impact Assessment.
* Preparation and management of a Building Information Model (BIM) model in accordance with the Employers Information Requirements (EIR).
* Attendance at Planning Committee and any accompanied member site visits
* Assisting discharge of conditions attached to Planning Consent.

Phase 3: RIBA Stage 4 Technical Design * Preparing technical designs, calculations and specifications sufficient to construct the Project in accordance with the Design Responsibility Matrix and agreed Information Exchanges.
* Preparing Room Data Sheets.
* Consulting statutory authorities on developing design.
* Providing information for updating estimate of Construction Cost.
* Reviewing the Project Execution Plan and Risk Assessments and the Sustainability, Maintenance and Operational, Handover, Construction and Health and Safety Strategies.
* Undertaking Third Party Consultations as required including preparing and making submissions under the Building Acts and/or regulations or other statutory requirements.
* Reviewing design information provided by contractors or specialists to establish whether that information can be co-ordinated and integrated with other project information.
* Giving general advice on operation and maintenance of the building.
* Preparation and management of a Building Information Model (BIM) model in accordance with the Employers Information Requirements (EIR).
* Prepare tender drawings, schedules and specifications as required for procurement of the Building Contract

Phase 4: RIBA Stage 5 Construction (option to novate or retain depending on the chosen route of procurement for construction)* Making visits to construction works as Designer
* (Responding to site queries as reasonably required for construction.
* Complying with the requirements of the Handover Strategy including agreement of information required for commissioning, training, handover, asset management, future monitoring and maintenance and on-going compilation of "Final Construction Issue Information".
* Assisting with the updating of the Construction and Health & Safety Strategies.
* Providing final construction issue drawings showing the building and main lines of drainage and other information, where applicable, for the *Health and Safety File (CDM 2015)* and the building log book *(Building Regulations Approved Document Part L2).*
* Reviewing compliance with statutory and contract requirements.

Phase 5: RIBA Stage 6 Handover and Close Out* Advising on resolution of defects.
* Providing information for agreeing final account.
* Assisting building user during initial occupation period, if applicable as attached schedule.
* Compiling maintenance and operational manuals

Phase 6: RIBA Stage 7 In Use* Carrying out Post-occupation Evaluation.

Appointment of Other Consultants/Design Team* 1. The Council will separately appoint the other members of the design team (including Quantity Surveyors, Cost Consultants and a Transport Consultant to undertake the Transport Impact Assessment) and the Consultant shall assist and co-operate with any other consultants appo**i**nted by the Council in the performance of the Services.
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| 8 | 1. Optional Services
	1. The Council may at its sole discretion instruct the Consultant to undertake any of the Optional Services during the commission of any part of the Project in relation to either the Carfax Site or the Cattlemarket Site or the public realm works in the masterplan area (if appropriate and as required) These Optional Services may comprise:
* Preparation of additional presentation material for Development Planning Control Committee including an A3 booklet with colour copies of all main drawings sketches etc
* Services in connection with value engineering
* Electronic document control system
* Revisions/amendments required to any planning application post committee eg as requested by potential tenants
* Two-stage tendering
* Interim and final valuations
* Revision of or preparation of additional documents to comply with changes in interpretation or enactment or revisions to laws or statutory regulations;
* instructions relating to work not in accordance with the building contract.
* Assessment of alternative designs, materials or products proposed by a contractor or subcontractor.
* Assistance to the Contract Administrator dealing with extensions of time and contractor’s claims.
* Services on behalf of the Client in connection with any dispute between the Client and another party.
* Services following damage to, or destruction of, a building in construction or existing buildings.
* Services following suspension or termination of any contract or agreement with or the insolvency of any other party providing services to the project.
* Specially prepared drawings of building as built, models, photographs etc.
* Commissioning and liaison with professional modelmakers to prepare a presentation model for public consultation and/or Planning Application.
* Provision of Computer Generated Images and Verified Views for use in public consultation and/or for Planning Application documentation.
	1. Any instructions in respect of these Optional Services shall be instructed as a Variation in accordance with the clauses of the Appointment.
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